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EXTENDED TO AUGUST 15, 2016
Return of Private Foundation

Form 990-PF

Department of the Treasury
Internal Revenue Service

or Section 4947(a)(1) Trust Treated as Private Foundation
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Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2015

Open to Public Inspection

For calendar year 2015 or tax year beginning , and ending

Name of foundation THE JOSEPH H. & REVA ENGEL FOUNDATION		A Employer identification number 63-0989498
Number and street (or P.O. box number if mail is not delivered to street address) P. O. BOX 3128	Room/suite	B Telephone number (205) 221-4000
City or town, state or province, country, and ZIP or foreign postal code JASPER, AL 35502-3128		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1 Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 370,598.	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received	240,500.		N/A	
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	120.	120.		STATEMENT 1
	4 Dividends and interest from securities	2,854.	2,854.		STATEMENT 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	-3,286.			
	b Gross sales price for all assets on line 6a	79,403.			
	7 Capital gain net income (from Part IV, line 2)		0.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss)				
	11 Other income				
	12 Total. Add lines 1 through 11	240,188.	2,974.		
	13 Compensation of officers, directors, trustees, etc.	0.	0.		0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees STMT 3	4,988.	3,741.		1,247.
	c Other professional fees STMT 4	77.	77.		0.
	17 Interest				
	18 Taxes STMT 5	44.	14.		0.
Total	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses				
	24 Total operating and administrative expenses. Add lines 13 through 23	5,109.	3,832.		1,247.
	25 Contributions, gifts, grants paid	122,820.			122,820.
	26 Total expenses and disbursements. Add lines 24 and 25	127,929.	3,832.		124,067.
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	112,259.			
	b Net investment income (if negative, enter -0-)		0.		
	c Adjusted net income (if negative, enter -0-)			N/A	

Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	95,853.	196,971.	196,971.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 6	124,343.	118,782.	132,486.
	c Investments - corporate bonds STMT 7	25,048.	41,753.	41,141.
	11 Investments - land, buildings, and equipment basis ▶			
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other				
14 Land, buildings, and equipment: basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe ▶)	3.	0.	0.	
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	245,247.	357,506.	370,598.	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
23 Total liabilities (add lines 17 through 22)	0.	0.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>			
	and complete lines 24 through 26 and lines 30 and 31			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>			
	and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	245,247.	357,506.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	0.	0.	
30 Total net assets or fund balances	245,247.	357,506.		
31 Total liabilities and net assets/fund balances	245,247.	357,506.		

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	245,247.
2 Enter amount from Part I, line 27a	2	112,259.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	357,506.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	357,506.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a SEE STATEMENT D-1 ATTACHED	P	VARIOUS	12/31/15
b SEE STATEMENT D-1 ATTACHED	P	VARIOUS	12/31/15
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 77,913.		81,487.	-3,574.
b 1,490.		1,202.	288.
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			-3,574.
b			288.
c			
d			
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	-3,286.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):	{ If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8 }	3	N/A

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2014	91,807.	280,263.	.327574
2013	75,107.	107,137.	.701037
2012	135,776.	46,215.	2.937921
2011	239,834.	214,237.	1.119480
2010	134,125.	172,270.	.778574

2 Total of line 1, column (d)	2	5.864586
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	1.172917
4 Enter the net value of noncharitable-use assets for 2015 from Part X, line 5	4	368,488.
5 Multiply line 4 by line 3	5	432,206.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	0.
7 Add lines 5 and 6	7	432,206.
8 Enter qualifying distributions from Part XII, line 4	8	124,067.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate.
See the Part VI instructions.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		1	0.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b			
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).		2	0.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		3	0.
3 Add lines 1 and 2		4	0.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		5	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			
6 Credits/Payments:			
a 2015 estimated tax payments and 2014 overpayment credited to 2015	6a		
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7		0.
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		0.
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be: Credited to 2016 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11		

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ \$ 0. (2) On foundation managers. ▶ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ AL		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>N/A</u>	X	
14 The books are in care of ► <u>MARK PFLAUM, CPA</u> Telephone no. ► <u>205-521-6311</u> Located at ► <u>505 20TH STREET NORTH, STE. 1150, BIRMINGHAM, AL</u> ZIP+4 ► <u>35203</u>		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	15	N/A
16 At any time during calendar year 2015, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►		X

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

	Yes	No
1a During the year did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (6) Agree to pay money or property to a government official? (Exception Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A	
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2015?		X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)): a At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ►		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If "Yes," did it have excess business holdings in 2015 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015)	N/A	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2015?		X

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Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions)

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No**b** If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

▶ ☐**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d)

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?☐ Yes ☒ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

X

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1 List all officers, directors, trustees, foundation managers and their compensation.**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
LISA R. ENGEL	PRESIDENT/DIRECTOR			
3547 KINGSHILL RD				
BIRMINGHAM, AL 35223	7.50	0.	0.	0.
ALAN Z. ENGEL	VICE PRES/SECRETARY/DIRECT			
3547 KINGSHILL RD				
BIRMINGHAM, AL 35223	1.00	0.	0.	0.
ANDREA ENGEL HINES	TREASURER/DIRECTOR			
1710 RIDGE ROAD				
HOMEWOOD, AL 35209	0.25	0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
N/A				
	0.00	0.	0.	0.

Total number of other employees paid over \$50,000

0

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Part VIII**Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** (continued)**3** Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
N/A		0.
Total number of others receiving over \$50,000 for professional services		0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1 N/A	0.

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

	Amount
1 N/A	0.
All other program-related investments. See instructions.	
Total. Add lines 1 through 3	0.

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Part X**Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	212,027.
b	Average of monthly cash balances	1b	162,073.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	374,100.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	374,100.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	5,612.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	368,488.
6	Minimum investment return. Enter 5% of line 5	6	18,424.

Part XI**Distributable Amount** (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	18,424.
2a	Tax on investment income for 2015 from Part VI, line 5	2a	
b	Income tax for 2015. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	0.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	18,424.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	18,424.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	18,424.

Part XII**Qualifying Distributions** (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	124,067.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	124,067.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	124,067.

Note The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2014	(c) 2014	(d) 2015
1 Distributable amount for 2015 from Part XI, line 7				18,424.
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2015:				
a From 2010	126,029.			
b From 2011	229,410.			
c From 2012	133,509.			
d From 2013	69,750.			
e From 2014	77,794.			
f Total of lines 3a through e	636,492.			
4 Qualifying distributions for 2015 from Part XII, line 4: ▶ \$ 124,067.				
a Applied to 2014, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2015 distributable amount				18,424.
e Remaining amount distributed out of corpus	105,643.			
5 Excess distributions carryover applied to 2015 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	742,135.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2014. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2015. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2016				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2010 not applied on line 5 or line 7	126,029.			
9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a	616,106.			
10 Analysis of line 9:				
a Excess from 2011	229,410.			
b Excess from 2012	133,509.			
c Excess from 2013	69,750.			
d Excess from 2014	77,794.			
e Excess from 2015	105,643.			

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)

N/A

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2015, enter the date of the ruling

b Check box to indicate whether the foundation is a private operating foundation described in section

☐ 4942(j)(3) or ☐ 4942(j)(5)

2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

Tax year	Prior 3 years			(e) Total
(a) 2015	(b) 2014	(c) 2013	(d) 2012	

b 85% of line 2a

c Qualifying distributions from Part XII, line 4 for each year listed

d Amounts included in line 2c not used directly for active conduct of exempt activities

e Qualifying distributions made directly for active conduct of exempt activities.

Subtract line 2d from line 2c

3 Complete 3a, b, or c for the alternative test relied upon:

a "Assets" alternative test - enter:

(1) Value of all assets

(2) Value of assets qualifying under section 4942(j)(3)(B)(i)

b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed

c "Support" alternative test - enter:

(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)

(3) Largest amount of support from an exempt organization

(4) Gross investment income

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see instructions.)**1 Information Regarding Foundation Managers:**

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)

ALAN Z. ENGEL

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

NONE

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed:

N/A

b The form in which applications should be submitted and information and materials they should include:

N/A

c Any submission deadlines:

N/A

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

N/A

Part XV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
SEE STATEMENT C-1	N/A	PUBLIC	VARIOUS	122,820.
Total			▶ 3a	122,820.
b Approved for future payment				
NONE				
Total			▶ 3b	0.

Part XVII	Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations	
-----------	---	--

- | | | Yes | No |
|----------|--|--------------|----------|
| 1 | Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? | | |
| a | Transfers from the reporting foundation to a noncharitable exempt organization of: | | |
| | (1) Cash | 1a(1) | X |
| | (2) Other assets | 1a(2) | X |
| b | Other transactions: | | |
| | (1) Sales of assets to a noncharitable exempt organization | 1b(1) | X |
| | (2) Purchases of assets from a noncharitable exempt organization | 1b(2) | X |
| | (3) Rental of facilities, equipment, or other assets | 1b(3) | X |
| | (4) Reimbursement arrangements | 1b(4) | X |
| | (5) Loans or loan guarantees | 1b(5) | X |
| | (6) Performance of services or membership or fundraising solicitations | 1b(6) | X |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees | 1c | X |
| d | If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. | | |

[illegible]

- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

- b** If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

**Sign
Here**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

and belief, it is true, correct, and complete. Declaration of

► *Ann E. Miller*

Date _____

8-15-14

► Treasurer / Director

Title

May the IRS discuss this return with the preparer shown below (see instr. 1)?

☒ Yes ☐ No

**Paid
Preparer
Use Only**

Print/Type preparer's name

Preparer's signature

Date

Check ☐ self-employed

PTIN	
------	--

STEPHEN M. BERMAN

William Brown, CPA

6/8/8

P00031703

Firm's name ▶ **STEPHEN M. BERMAN & ASSOC., L.L.C.**

Firm's EIN ▶ 58-1540139

Firm's address ► 3475 LENOX ROAD, N.E., SUITE 950
ATLANTA 30326

Phone no. **404-262-2181**

Form **990-PF** (2015)

Schedule B(Form 990, 990-EZ,
or 990-PF)Department of the Treasury
Internal Revenue Service**Schedule of Contributors**

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.
▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and
its instructions is at www.irs.gov/form990.

OMB No 1545-0047

2015

Name of the organization

THE JOSEPH H. & REVA ENGEL FOUNDATION

Employer identification number

63-0989498

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

- ☐ 501(c)() (enter number) organization
- ☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
- ☐ 527 political organization

Form 990-PF

- ☒ 501(c)(3) exempt private foundation
- ☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
- ☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.**General Rule**

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. ▶ \$ _____

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2015)

Name of organization	Employer identification number
THE JOSEPH H. & REVA ENGEL FOUNDATION	63-0989498

Part I Contributors (see instructions) Use duplicate copies of Part I if additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
<u>1</u>	JOSEPH ENGEL REVOCABLE TRUST DTD 6/30/99 505 20TH STREET NORTH, STE. 1150 BIRMINGHAM, AL 35203	\$ 240,500.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)

Name of organization

Employer identification number

THE JOSEPH H. & REVA ENGEL FOUNDATION**63-0989498****Part II Noncash Property** (see instructions) Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	

Name of organization	Employer identification number
THE JOSEPH H. & REVA ENGEL FOUNDATION	63-0989498

Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year (Enter this info once) ▶ \$ _____
Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
FIRST NATIONAL BANK OF JASPER	120.	120.	
TOTAL TO PART I, LINE 3	120.	120.	

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
STATE STREET BANK AND TRUST CO, NOMINEE	773.	0.	773.	773.	
STATE STREET BANK AND TRUST CO, NOMINEE	2,081.	0.	2,081.	2,081.	
TO PART I, LINE 4	2,854.	0.	2,854.	2,854.	

FORM 990-PF ACCOUNTING FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	4,988.	3,741.		1,247.
TO FORM 990-PF, PG 1, LN 16B	4,988.	3,741.		1,247.

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
INVESTMENT ADVISORY FEE - RHB	77.	77.			0.
TO FORM 990-PF, PG 1, LN 16C	77.	77.			0.

FORM 990-PF	TAXES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FOREIGN TAX PAID	14.	14.			0.
EXCISE TAX	30.	0.			0.
TO FORM 990-PF, PG 1, LN 18	44.	14.			0.

FORM 990-PF	CORPORATE STOCK		STATEMENT	6
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE		
BLUESTEIN & COMPANY - NOMINEE - SEE STATEMENT A-1	118,782.	132,486.		
TOTAL TO FORM 990-PF, PART II, LINE 10B	118,782.	132,486.		

FORM 990-PF	CORPORATE BONDS		STATEMENT	7
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE		
BLUESTEIN & COMPANY - NOMINEE - SEE STATEMENT A-1	41,753.	41,141.		
TOTAL TO FORM 990-PF, PART II, LINE 10C	41,753.	41,141.		

FORM 990-PF

STATEMENT CONCERNING LIQUIDATION,
TERMINATION, ETC. - PART VII-A, LINE 5

STATEMENT 8

EXPLANATION

ONCE SETTLED, THE FOUNDATION WILL BE THE RECIPIENT OF 50% OF THE ASSETS IN THE ESTATE OF JOSEPH H. ENGEL. WHEN THE ACCOUNT RECEIVABLE IS ADDED TO THE ASSETS WITHIN THE FOUNDATION, A TECHNICAL TERMINATION IS NOT DEEMED TO HAVE OCCURRED BECAUSE NOT MORE THAN 25% OF THE FAIR MARKET VALUE OF THE ASSETS HAVE BEEN DISTRIBUTED.

R. H. BLUESTEIN & COMPANY
INVESTMENT MANAGERS AND ADVISORS

PORTFOLIO APPRAISAL
Joseph H. and Reva Engel Foundation (Alan Engel),
Lisa R. Engel, Alan Z. Engel and Andrea J. Engel, Directors (HS8621)
December 31, 2015

Quantity	Security	Unit Cost	Total Cost	Price	Market Value	Pct. Assets	Yield
COMMON STOCK							
CONSUMER DISCRETIONARY							
10	Amazon.com Inc	332.52	3,325	675.89	6,759	2.3	0.0
200	Ford Motor Company	16.60	3,320	14.09	2,818	1.0	4.3
100	Hilton Worldwide Hldgs	24.88	2,488	21.40	2,140	0.7	1.3
35	Home Depot Inc	90.59	3,171	132.25	4,629	1.6	1.8
50	Jarden Corp	43.38	2,169	57.12	2,856	1.0	0.0
10	Netflix Inc	107.35	1,073	114.38	1,144	0.4	0.0
50	Starbucks Corp	55.71	2,785	60.03	3,002	1.0	1.3
50	Under Armour Inc Cl A	67.54	3,377	80.61	4,031	1.4	0.0
50	Walt Disney Co	96.57	4,828	105.08	5,254	1.8	1.4
			26,537		32,631	11.3	1.0
CONSUMER STAPLES							
50	Church & Dwight Co	69.77	3,488	84.88	4,244	1.5	1.6
25	Costco Wholesale Corp	121.89	3,047	161.50	4,038	1.4	1.0
25	CVS Health Corp	104.90	2,623	97.77	2,444	0.8	1.7
			9,158		10,726	3.7	1.4
ENERGY							
35	Exxon Mobil Corp	99.59	3,486	77.95	2,728	0.9	3.7
35	Schlumberger Ltd	105.12	3,679	69.75	2,441	0.8	2.9
			7,165		5,170	1.8	3.3
FINANCIALS							
35	Prudential Financial Inc	90.04	3,151	81.41	2,849	1.0	3.4
75	US Bancorp	43.69	3,277	42.67	3,200	1.1	2.4
			6,428		6,050	2.1	2.9
HEALTHCARE							
15	Allergan PLC	229.23	3,439	312.50	4,688	1.6	0.0
100	Boston Scientific Corp	17.00	1,700	18.44	1,844	0.6	0.0
50	Bristol-Myers Squibb	53.86	2,693	68.79	3,440	1.2	2.2
25	Gilead Sciences Inc	104.35	2,609	101.19	2,530	0.9	1.7
			10,441		12,501	4.3	1.0
INDUSTRIALS							
15	Boeing Co	127.86	1,918	144.59	2,169	0.7	3.0
50	Caterpillar Inc	99.74	4,987	67.96	3,398	1.2	4.5
100	General Electric Co	31.36	3,136	31.15	3,115	1.1	3.0
35	Honeywell International	105.81	3,703	103.57	3,625	1.3	2.3
15	Lockheed Martin Corp	175.15	2,627	217.15	3,257	1.1	3.0
15	Raytheon Co	123.96	1,859	124.53	1,868	0.6	2.2
15	Union Pacific Corp	105.94	1,589	78.20	1,173	0.4	2.8
			19,821		18,605	6.4	3.0

R. H. BLUESTEIN & COMPANY
INVESTMENT MANAGERS AND ADVISORS

PORTFOLIO APPRAISAL

**Joseph H. and Reva Engel Foundation (Alan Engel),
Lisa R. Engel, Alan Z. Engel and Andrea J. Engel, Directors (HS8621)
December 31, 2015**

Quantity	Security	Unit Cost	Total Cost	Price	Market Value	Pct. Assets	Yield
TECHNOLOGY							
5	Alphabet Inc Cl C	580.86	2,904	758.88	3,794	1.3	0.0
25	Apple Inc	100.86	2,522	105.26	2,632	0.9	2.0
50	ARM Hldgs PLC ADR	48.38	2,419	45.24	2,262	0.8	0.7
25	Electronic Arts Inc	73.15	1,829	68.72	1,718	0.6	0.0
50	Facebook Inc Cl A	79.21	3,960	104.66	5,233	1.8	0.0
25	Palo Alto Networks Inc	95.41	2,385	176.14	4,404	1.5	0.0
60	Visa Inc Cl A	56.29	3,377	77.55	4,653	1.6	0.7
			19,397		24,695	8.5	0.4
MATERIALS							
50	Dow Chemical Co	47.86	2,393	51.48	2,574	0.9	3.6
25	Ecolab Inc	113.91	2,848	114.38	2,860	1.0	1.2
15	Sherwin Williams Co	217.59	3,264	259.60	3,894	1.3	1.0
50	Steel Dynamics Inc	18.86	943	17.87	894	0.3	3.1
			9,447		10,221	3.5	1.9
TELECOMMUNICATION SERVICES							
35	T-Mobile US Inc	40.12	1,404	39.12	1,369	0.5	0.0
UTILITIES							
50	American Water Works	49.38	2,469	59.75	2,988	1.0	2.3
35	NextEra Energy Inc	103.06	3,607	103.89	3,636	1.3	3.0
			6,076		6,624	2.3	2.7
SPECIAL SITUATIONS							
10	AMERCO	290.85	2,909	389.50	3,895	1.3	0.0
			118,782		132,486	45.7	1.5
CORPORATE BONDS							
10,000	AT&T INC (Callable) 2.950% Due 05-15-16	102.33	10,233	100.61	10,061	3.5	0.7
10,000	LOCKHEED MARTIN CORP (Callable) 2.125% Due 09-15-16	101.68	10,168	100.68	10,068	3.5	0.9
10,000	KROGER CO 1.200% Due 10-17-16	100.45	10,045	99.80	9,980	3.4	0.9
10,000	NORFOLK SOUTHERN CORP 7.700% Due 05-15-17	113.07	11,307	108.08	10,808	3.7	1.1
	Accrued Interest				223	0.1	
			41,753		41,141	14.2	0.9
CASH/MONEY MKT							
	Federated Govt Obligations Fund		116,062		116,062	40.1	0.0
TOTAL PORTFOLIO			276,597		289,689	100.0	0.8

THE JOSEPH H. AND REVA ENGEL FOUNDATION
FORM 990 - PF
12/31/2015

RECIPIENT	PURPOSE	AMOUNT
Aish Ha Torah	Religious	500.00
Alabama Possible	Civic	300.00
Alabama Symphony Orchestra	Civic	2,700.00
Alpha Epsilon Phi	Educational	25.00
Alys Stevens Center	Civic	2,500.00
Alzheimers Of Central Alabama	Medical	525.00
American Heart Association	Medical	50.00
Audeth Israel Etz Ahayem Synagogue	Religious	18.00
Birmingham First Seventh Day Adventist	Religious	250.00
Birmingham Holocaust Educational Committee	Educational	500.00
Birmingham International Center	Civic	250.00
Birmingham Jewish Federation	Civic	198.00
Birmingham Jewish Foundation	Religious	36.00
Birmingham Museum Of Art	Civic	2,500.00
Birmingham Zoo	Civic	220.00
Bloom Hillel	Educational	180.00
Boy Scouts of America	Civic	100.00
Brith Sholom Beth Israel	Religious	18.00
Chabad Of Alabama	Religious	540.00
Chizuk Amuno	Religious	36.00
Church at Brook Hills	Religious	50.00
Collat Jewish Family Services	Religious	3,018.00
Community Furniture Bank	Civic	50.00
Congregation Beth-El	Religious	100.00
Crippled Children's Foundation	Medical	200.00
Crisis Center	Medical	75.00
Delta Gamma Fraternity	Civic	50.00
Dixie Golf Foundation	Civic	150.00
Emmet O'Neal Library	Educational	25.00
Feeding South Florida	Civic	50.00
Girl Scouts of North Central Alabama	Civic	160.00
Girls Inc.	Civic	500.00
Hadassah	Religious	1,255.00
Heart Gallery Alabama	Medical	100.00
Hispanic Interest Coalition of AL (HICA)	Civic	100.00
Hope Clinic	Medical	50.00
Horizons School	Educational	2,500.00
IMPACT, AL	Civic	500.00
Indian Springs School	Educational	500.00
Institute Of Southern Jewish Life	Civic	250.00
Jewish Women's Fund of Atlanta	Civic	360.00
Jimmy Hale Mission	Civic	100.00
JoAnn Hess Morrison Chai Tots (Jahm)	Educational	590.00
Joint Distribution Committee	Civic	1,000.00
Knesseh Israel	Religious	268.00
Leket Israel	Religious	500.00
Levite Jewish Community	Religious	1,000.00
Magic Moments	Civic	150.00
March of Dimies	Medical	25.00
N E Miles Jewish Day School	Educational	1,200.00
National Conference for Community and Justice (NCCJ) of AL	Civic	1,500.00
National Fire Safety Council Inc.	Civic	52.00
Northwestern University	Educational	7,500.00

THE JOSEPH H. AND REVA ENGEL FOUNDATION
FORM 990 - PF
12/31/2015

RECIPIENT	PURPOSE	AMOUNT
Oasis	Civic	1,000.00
Pathways	Religious	50.00
Rabbi Graffman Endowment Fund	Religious	100.00
Ransom Everglades School	Educational	50.00
Red Mountain Theatre Company	Civic	5,000.00
Shalom Cares	Civic	25.00
Sidewalk Film Festival	Civic	50.00
Sisterhood Of Temple Beth-El	Religious	309.00
Steve Byars Scholarship Fund	Educational	100.00
Teach for America	Educational	5,000.00
Temple B'nai Sholom	Religious	18.00
Temple Beth El	Religious	823.00
Temple Beth El Tikvah	Religious	36.00
Temple Emanu-El	Religious	716.00
The Exceptional Foundation	Educational	125.00
The Humane Society of the US	Civic	18.00
The Temple	Religious	54.00
The Women's Fund	Civic	5,050.00
Torah Fund	Civic	180.00
UAB Comprehensive Cancer Center	Medical	25.00
UAB Dept. Of Psychiatry	Medical	49,911.75
UAB National Alumni Society	Civic	125.00
United Negro College Fund	Educational	100.00
United States Holocaust Museum	Civic	180.00
University of Alabama	Educational	5,000.00
University of Colorado Foundation	Civic	250.00
Washington University in St Louis	Educational	10,000.00
WBHM Public Radio	Civic	150.00
Women's Jewish Learning Center	Educational	500.00
Yemin Orde	Religious	2,500.00
YWCA	Civic	
		<u>122,819.75</u>