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Form 990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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 WEST FOUNDATION, INC.		A Employer identification number 72-6018637
Number and street (or P O box number if mail is not delivered to street address) 6121 FERN AVENUE, UNIT 122	Room/suite	B Telephone number (318) 371-2350
City or town, state or province, country, and ZIP or foreign postal code SHREVEPORT, LA 71105		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply. <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input checked="" type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <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) \$ 655,292. (Part I, column (d) must be on cash basis)	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)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities		18,437.	18,437.		STATEMENT 1
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		21,331.			
b Gross sales price for all assets on line 6a 106,579.					
7 Capital gain net income (from Part IV, line 2)			21,331.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income					
12 Total. Add lines 1 through 11		39,768.	39,768.		
13 Compensation of officers, directors, trustees, etc		7,200.	3,600.		3,600.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees		675.	68.		607.
c Other professional fees					
17 Interest					
18 Taxes		1,093.	324.		275.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings		1,106.	0.		1,106.
22 Printing and publications					
23 Other expenses		8,556.	974.		0.
24 Total operating and administrative expenses. Add lines 13 through 23		18,630.	4,966.		5,588.
25 Contributions, gifts, grants paid		30,930.			30,930.
26 Total expenses and disbursements. Add lines 24 and 25		49,560.	4,966.		36,518.
27 Subtract line 26 from line 12.					
a Excess of revenue over expenses and disbursements		<9,792.>			
b Net investment income (if negative, enter -0-)			34,802.		
c Adjusted net income (if negative, enter -0-)				N/A	

523501 11-24-15 LHA For Paperwork Reduction Act Notice, see instructions.

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09560508 756104 03985-001X

2015.03030 WEST FOUNDATION, INC.

03985-01

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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	7,952.	20,871.	20,871.
	2 Savings and temporary cash investments	701.	702.	702.
	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 5	647,560.	633,719.	633,719.
	c Investments - corporate bonds			
	Liabilities	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 ▶)				
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		656,213.	655,292.	655,292.
17 Accounts payable and accrued expenses				
18 Grants payable				
Net Assets or Fund Balances	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	831,689.	831,689.	
28 Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.		
29 Retained earnings, accumulated income, endowment, or other funds	<175,476.>	<176,397.>		
30 Total net assets or fund balances	656,213.	655,292.		
31 Total liabilities and net assets/fund balances	656,213.	655,292.		

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	656,213.
2 Enter amount from Part I, line 27a	2	<9,792.>
3 Other increases not included in line 2 (itemize) ▶ UNREALIZED GAIN ON INVESTMENTS	3	8,871.
4 Add lines 1, 2, and 3	4	655,292.
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	655,292.

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 WELLS FARGO #2958 SEE ATTACHED	P		
b WELLS FARGO #2958 SEE ATTACHED	P		
c WELLS FARGO #2958 SEE ATTACHED	P		
d DEUTSCHE BANK	P	07/13/07	02/20/15
e CAPITAL GAINS DIVIDENDS			

(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 5,739.		6,415.	<676.>
b 252.		248.	4.
c 93,698.		73,585.	20,113.
d 5,000.		5,000.	0.
e 1,890.			1,890.
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			
(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	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			<676.>
b			4.
c			20,113.
d			0.
e			1,890.

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	21,331.
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	28,430.	627,258.	.045324
2013	37,503.	614,050.	.061075
2012	35,696.	604,665.	.059034
2011	33,802.	606,524.	.055731
2010	33,594.	544,048.	.061748

2 Total of line 1, column (d)	2	.282912
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	.056582
4 Enter the net value of noncharitable-use assets for 2015 from Part X, line 5	4	638,800.
5 Multiply line 4 by line 3	5	36,145.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	348.
7 Add lines 5 and 6	7	36,493.
8 Enter qualifying distributions from Part XII, line 4	8	36,518.

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 ☐ and enter "N/A" on line 1.

Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)

b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ 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 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)

3 Add lines 1 and 2

4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -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

b Exempt foreign organizations - tax withheld at source

c Tax paid with application for extension of time to file (Form 8868)

d Backup withholding erroneously withheld

7 Total credits and payments. Add lines 6a through 6d

8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached

9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed

10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid

11 Enter the amount of line 10 to be. Credited to 2016 estimated tax

Refunded

Part VII-A Statements Regarding Activities

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?

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

c Did the foundation file Form 1120-POL for this year?

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

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

4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?

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?

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

8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☐

LA

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

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

10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses

	Yes	No
1a		X
1b		X
1c		X
2		X
3		X
4a		X
4b		
5		X
6	X	
7	X	
8b	X	
9		X
10		X

N/A

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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)	11	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)	12	X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X
14 The books are in care of ► A DAVID EVANS Telephone no. ► (318) 458-4314 Located at ► 6121 FERN AVENUE, UNIT 122, SHREVEPORT, LA ZIP+4 ► 71105		
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 ►	16	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 checked="" type="checkbox"/> Yes <input 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 ► <input type="checkbox"/>	1b	X
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?	1c	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. ► , , ,	2b	
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	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	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?	4b	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

6b

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

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

7b

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

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
SEE STATEMENT 6		7,200.	0.	7,582.

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
NONE				

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
NONE		

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	
2	
3	
4	

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	
2	
All other program-related investments. See instructions.	
3	

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	638,188.
b	Average of monthly cash balances	1b	10,340.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	648,528.
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	648,528.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	9,728.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	638,800.
6	Minimum investment return. Enter 5% of line 5	6	31,940.

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	31,940.
2a	Tax on investment income for 2015 from Part VI, line 5	2a	348.
b	Income tax for 2015. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	348.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	31,592.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	31,592.
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	31,592.

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	36,518.
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	36,518.
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	348.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	36,170.

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				31,592.
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only			62.	
b Total for prior years.		0.		
3 Excess distributions carryover, if any, to 2015:				
a From 2010				
b From 2011				
c From 2012				
d From 2013				
e From 2014				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2015 from Part XII, line 4: ▶ \$ 36,518.				
a Applied to 2014, but not more than line 2a			62.	
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				31,592.
e Remaining amount distributed out of corpus	4,864.			
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	4,864.			
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	0.			
9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a	4,864.			
10 Analysis of line 9				
a Excess from 2011				
b Excess from 2012				
c Excess from 2013				
d Excess from 2014				
e Excess from 2015	4,864.			

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(i)(5)

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

Recipient	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
Name and address (home or business)				
a Paid during the year				
BAYLOR UNIVERSITY 1311 SOUTH 5TH STREET WACO, TX 76798	NONE	PUBLIC	EDUCATIONAL	9,000.
BOY SCOUTS OF AMERICA 3508 BEVERLY PLACE SHREVEPORT, LA 71104-4606	NONE	PUBLIC	CHARITABLE	500.
FIRST BAPTIST CHURCH 301 PENNSYLVANIA AVENUE MINDEN, LA 71055-5623	NONE	PUBLIC	RELIGIOUS	6,000.
L.S.U. TIGER ATHLETIC FOUNDATION P. O. BOX 711 BATON ROUGE, LA 70821	NONE	PUBLIC	EDUCATIONAL	10,405.
YMCA SHREVEPORT 400 MCNEIL STREET SHREVEPORT, LA 71101	NONE	PUBLIC	CHARITABLE	1,000.
Total SEE CONTINUATION SHEET(S) ▶ 3a				30,930.
b Approved for future payment				
NONE				
Total ▶ 3b				0.

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3 Grants and Contributions Paid During the Year (Continuation)

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04-01-15

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
EDWARD JONES MINDEN BANCORP, INC.	1,538.	5.	1,533.	1,533.	
WELLS FARGO - 2958	6,160.	0.	6,160.	6,160.	
WELLS FARGO - 6305	3,535.	1,885.	1,650.	1,650.	
	9,094.	0.	9,094.	9,094.	
TO PART I, LINE 4	20,327.	1,890.	18,437.	18,437.	

FORM 990-PF	ACCOUNTING FEES	STATEMENT	2
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
HEARD, MCELROY & VESTAL	675.	68.		607.
TO FORM 990-PF, PG 1, LN 16B	675.	68.		607.

FORM 990-PF	TAXES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FORM 990-PF	494.	0.		0.
FOREIGN TAX WITHHELD	49.	49.		0.
PAYROLL TAXES	550.	275.		275.
TO FORM 990-PF, PG 1, LN 18	1,093.	324.		275.

FORM 990-PF	OTHER EXPENSES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
INVESTMENT FEES	974.	974.		0.	
INSURANCE	7,582.	0.		0.	
TO FORM 990-PF, PG 1, LN 23	8,556.	974.		0.	

FORM 990-PF	CORPORATE STOCK		STATEMENT	5
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE		
WELLS FARGO #6305	223,381.	223,381.		
EDWARD JONES	0.	0.		
MINDEN BANCORP COMMON STOCK	315,000.	315,000.		
WELLS FARGO #2958	95,338.	95,338.		
TOTAL TO FORM 990-PF, PART II, LINE 10B	633,719.	633,719.		

FORM 990-PF

PART VIII - LIST OF OFFICERS, DIRECTORS
TRUSTEES AND FOUNDATION MANAGERS

STATEMENT 6

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
C. O. WEST 282 CIRCLE W RANCH ROAD MINDEN, LA 71055	DIRECTOR/PRES 2.00	7,200.	0.	7,582.
LEATRICE D. WEST 282 CIRCLE W RANCH ROAD MINDEN, LA 71055	DIRECTOR/VP 2.00	0.	0.	0.
A. DAVID EVANS 1307 EAST TODD MINDEN, LA 71055	DIR/SEC-TREAS 1.00	0.	0.	0.
GLORIA EVANS 1307 EAST TODD MINDEN, LA 71055	DIR/ASST S-T 1.00	0.	0.	0.
SANDRA W JACKSON 338 CIRCLE W RANCH ROAD MINDEN, LA 71055	DIRECTOR 1.00	0.	0.	0.
CLAUDIA LEE 264 CIRCLE W RANCH ROAD MINDEN, LA 71055	DIRECTOR 1.00	0.	0.	0.
PEGGY WATERS 1502 EAMES MINDEN, LA 71055	DIRECTOR 1.00	0.	0.	0.
MARK D EVANS 9207 STONEBRIAR CIRCLE SHREVEPORT, LA 71115	DIRECTOR 1.00	0.	0.	0.
KAREN E ANTHONY 705 MUIRFIELD ROAD KELLER, TX 76248	DIRECTOR 1.00	0.	0.	0.
KATHY S BLAZEK 7607 BROKEN OAK LANE SUGARLAND, TX 77479	DIRECTOR 1.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		7,200.	0.	7,582.

2015 Year-End Account Summary

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WEST FOUNDATION INC

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Proceeds from Broker and Barter Exchange Transactions

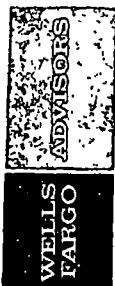
Short Term Gains or Losses (Box 2) For Covered Securities (Box 5)

Description (Box 1a) CUSIP	Quantity Sold	Date Acquired (Box 1b)	Date Sold or Disposed (Box 1c)	Proceeds (Box 1d)	Cost or Other Basis (Box 1e)	Code (Box 1f)	Adjustments (Box 1g)	Gain/Loss Amount	Additional Information
AMG FUNDS III MANAGERS BOND FUND CUSIP: 00170L834	2 05000	04/23/2015	08/18/2015	55 79	57 28		0 00	-1 49	
ADVISORS INNER CIRCLE * FD II INC NEW CHAMPLAIN CUSIP: 00764Q405	1 73600	04/23/2015	08/18/2015	29 15	29 67		0 00	-0 52	
ABERDEEN TOTAL RETURN * BOND FUND CLASS I CUSIP: 04315J209	153 56700	04/23/2015	08/18/2015	2,017 87	2,059 92		0 00	-42 05	Original Basis 2,060 87
COHEN & STEERS RLTY * SHARES INC CUSIP: 192476109	0 67500	04/23/2015	08/18/2015	49 02	53 03		0 00	-4 01	
DODGE & COX STK FD * CUSIP: 256219106	0 63000	04/23/2015	08/18/2015	113 74	114 80		0 00	-1 06	
GOLDMAN SACHS TR * STRATEGIC INCOME FD CL CUSIP: 38145C646	10 31800	04/23/2015	08/18/2015	103 28	103 80		0 00	-0 52	
JPMORGAN TR I INTREPID VALUE FD SELECT CUSIP: 4812A2306	27 93400	04/23/2015	08/18/2015	998 09	1,022 67		0 00	-24 58	

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2015 Year-End Account Summary



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WEST FOUNDATION INC

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Proceeds from Broker and Barter Exchange Transactions (continued)

Short Term Gains or Losses (Box 2) For Covered Securities (Box 5)

Description CUSIP (Box 1a)	Quantity Sold (Box 1b)	Date Acquired (Box 1c)	Date Sold or Disposed (Box 1d)	Proceeds (Box 1e)	Cost or Other Basis (Box 1f)	Code (Box 1g)	Adjustments (Box 1h)	Gain/Loss Amount	Additional Information
METROPOLITAN WEST FDS *	9 59100	04/23/2015	08/18/2015	103 77	105 70		0 00	-1 93	
TOTAL RETURN BD FD CL I CUSIP: 592905509									
OPPENHEIMER INTL BD FD *	6 27300	04/23/2015	08/18/2015	36 07	36 95		0 00	-0 88	Original Basis 37 08
CLASS Y CUSIP: 68380T509									
OPPENHEIMER SENIOR *	3 95600	04/23/2015	08/18/2015	31 69	32 33		0 00	-0 64	
FLOATING RATE FD CL Y CUSIP: 68381K408									
PIMCO FDS PAC INVT *	226 24450	04/23/2015	12/15/2015	1 434 38	2 000 00		0 00	-565 62	
MGMT SER-COMMODITY REAL CUSIP: 722005667	3 20950	06/19/2015	12/15/2015	20 34	27 60		0 00	-7 26	
	27 94300	08/18/2015	12/15/2015	177 17	210 97		0 00	-33 80	
	5 01200	09/18/2015	12/15/2015	31 78	36 94		0 00	-5 16	
Subtotals	262 40900			\$1,663.67	\$2,276.51		\$0.00	(\$611.84)	
T ROWE PRICE BLUE CHIP *	6 18400	04/23/2015	08/18/2015	465 85	451 13		0 00	14 72	
GROWTH FUND CUSIP: 77954Q106									
AMERICAN FUNDS	1 72800	04/23/2015	08/18/2015	70 63	71 80		0 00	-1 17	
WASHINGTON MUTUAL FD F2 CUSIP: 939330825									
Totals				\$5,738.62	\$6,414.59		\$0.00	(\$676.97)	

2015 Year-End Account Summary

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WEST FOUNDATION INC

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Proceeds from Broker and Barter Exchange Transactions, Continued

Long Term Gains or Losses (Box 2) For Covered Securities (Box 5)

Description CUSIP (Box 1a)	Quantity Sold	Date Acquired (Box 1b)	Date Sold or Disposed (Box 1c)	Proceeds (Box 1d)	Cost or Other Basis (Box 1e)	Code (Box 1f)	Adjustments (Box 1g)	Gain/Loss Amount	Additional Information
BLACKROCK INTL GROWTH & INCOME TRUST CUSIP 092524107	34.98300 0.01700	03/28/2013 03/28/2013	04/16/2015 04/16/2015	251.88 0.12	247.42 0.13		0.00 0.00	4.46 -0.01	Original Basis 256.90
Subtotals	35.00000			\$252.00	\$247.55		\$0.00	\$4.45	
Totals				\$252.00	\$247.55		\$0.00	\$4.45	

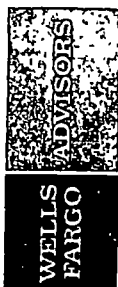


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2015 Year-End Account Summary

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WEST FOUNDATION INC

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Proceeds from Broker and Barter Exchange Transactions (Continued)

Long Term Gains or Losses (Box 2) For Noncovered Securities (Box 5)

Description CUSIP (Box 1a)	Quantity Sold	Date Acquired (Box 1b)	Date Sold or Disposed (Box 1c)	Proceeds (Box 1d)	Cost or Other Basis (Box 1e)	Code	Adjustments	Gain/Loss Amount	Additional Information
ABBOTT LABORATORIES CUSIP: 002824100	40 00000	02/08/2006	04/16/2015	1,859.57	805.89		0.00	1,053.68	
	14 00000	07/12/2006	04/16/2015	650.85	298.49		0.00	352.36	
Subtotals	54.00000			\$2,510.42	\$1,104.38		\$0.00	\$1,406.04	
ABBVIE INC CUSIP: 00287Y109	40 00000	02/08/2006	04/16/2015	2,481.16	873.91		0.00	1,607.25	
	14 00000	07/12/2006	04/16/2015	868.41	323.67		0.00	544.74	
Subtotals	54.00000			\$3,349.57	\$1,197.58		\$0.00	\$2,151.99	
AMERICAN ELECTRIC POWER INC CUSIP: 025537101	650 00000	11/05/1993	04/16/2015	36,367.48	31,867.30		0.00	4,500.18	
	200 00000	11/05/1993	04/16/2015	11,194.57	9,805.32		0.00	1,389.25	
Subtotals	850.00000			\$47,562.05	\$41,672.62		\$0.00	\$5,889.43	
BHP BILLITON LTD SPON ADR CUSIP: 088606108	23 00000	04/01/2008	04/16/2015	1,078.48	1,531.63		0.00	-453.15	
BRISTOL MYERS SQUIBB CO CUSIP: 110122108	79 00000	10/09/2007	04/16/2015	5,014.04	2,361.25		0.00	2,652.79	
HALLIBURTON COMPANY CUSIP: 406216101	53 00000	02/12/2008	04/16/2015	2,546.67	1,859.39		0.00	687.28	
INTERNATIONAL BUSINESS MACHINE CORP CUSIP: 459200101	27 00000	07/09/2007	04/16/2015	4,400.92	2,939.77		0.00	1,461.15	
PROCTER & GAMBLE CO CUSIP: 742718109	6 00000	02/28/2005	04/16/2015	501.49	320.53		0.00	180.96	
	15 00000	02/13/2006	04/16/2015	1,253.73	892.47		0.00	361.26	
	12 00000	04/27/2006	04/16/2015	1,002.99	703.80		0.00	299.19	

2015 Year-End Account Summary

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WEST FOUNDATION INC

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Proceeds from Broker and Barter Exchange Transactions Continued

Long Term Gains or Losses (Box 2) For Noncovered Securities (Box 5)

Description CUSIP (Box 1a)	Quantity Sold	Date Acquired (Box 1b)	Date Sold or Disposed (Box 1c)	Proceeds (Box 1d)	Cost or Other Basis	Code	Adjustments	Gain/Loss Amount	Additional Information
PROCTER & GAMBLE CO CUSIP 742718109	12 00000	04/28/2007	04/16/2015	1,003 00	757 90		0 00	245 10	
Subtotals	46 00000			\$3,761.21	\$2,674.70		\$0.00	\$1,086.51	
THORNBURG INVT TR INVT INCOME BUILDER CUSIP 885215558	844 32700	06/14/2006	04/16/2015	18,676 51	16,000 00		0 00	2,676 51	
UNITED TECHNOLOGIES CORP CUSIP 913017109	23 00000	03/03/2004	04/16/2015	2,691 86	1,037 30		0 00	1,654 56	
	11 00000	04/09/2007	04/16/2015	1,287 42	714 78		0 00	572 64	
	7 00000	03/27/2008	04/16/2015	819 27	491 32		0 00	327 95	
Subtotals	41 00000			\$4,798.55	\$2,243.40		\$0.00	\$2,555.15	
Totals				\$93,698.42	\$73,584.72		\$0.00	\$20,113.70	

The Code column will reflect W for wash sale, C for collectibles, or D for market discount

For some tax lots complete data is not available. Therefore, you may see N/A in the Proceeds, Gain/Loss or Cost columns. In these situations, you should determine the actual cost or proceeds and calculate the Gain/Loss. Please note that the totals will include any available cost or proceeds, even if the Gain/Loss is marked N/A.



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