E-file Reject

Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation

▶ Do not enter social security numbers on this form as it may be made public

▶ 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 , 2015, and ending , 20

Name of foundation: STRATTON PETIT FOUNDATION

A Employer identification number: 95-4709973

Number and street (or PO box number if mail is not delivered to street address): 20929 VENTURA BLVD

Room/suite: 47-301

B Telephone number (see instructions): (818)835-9728

City or town state or province, country, and ZIP or foreign postal code: WOODLAND HILLS, CA 91364-2334

C If exemption application is pending check here ▶ ☐

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

D 1 Foreign organizations check here ▶ ☐

2 Foreign organizations meeting the 85% test check here and attach computation ▶ ☐

H Check type of organization: ☐ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☒ Other taxable private foundation

E If private foundation status was terminated under section 507(b)(1)(A) check here ▶ ☐

I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ $ 2,025,000

J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) (Part I, column (d) must be on cash basis)

F If the foundation is in a 60-month termination under section 507(b)(1)(B) check here ▶ ☐

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) (see instructions))

		(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 (attach schedule)				
2	Check ▶ ☒ if the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments				
4	Dividends and interest from securities				
5a	Gross rents	240,854	240,854		
b	Net rental income or (loss) 236,500				
6a	Net gain or (loss) from sale of assets not on line 10				
b	Gross sales price for all assets on line 6a				
7	Capital gain net income (from Part IV line 2)				
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) (attach schedule)				
11	Other income (attach schedule)				
12	**Total** Add lines 1 through 11	240,854	240,854		
Operating and Administrative Expenses 13	Compensation of officers, directors trustees etc	28,500	14,250		14,250
14	Other employee salaries and wages				
15	Pension plans, employee benefits	24,340	12,170		17,170
16a	Legal fees (attach schedule) STM107	3,200			3,200
b	Accounting fees (attach schedule) STM108	2,650	1,325		1,325
c	Other professional fees (attach schedule)				
17	Interest	1,387	1,387		
18	Taxes (attach schedule) (see instructions) STM110	1,353			
19	Depreciation (attach schedule) and depletion STM126	2,617			
20	Occupancy				
21	Travel, conferences and meetings	3,473	348		3,125
22	Printing and publications				
23	Other expenses (attach schedule) STM103	33,711	25,736		7,975
24	**Total operating and administrative expenses** Add lines 13 through 23	101,231	55,216		47,045
25	Contributions, gifts, grants paid	148,967			148,967
26	**Total expenses and disbursements** Add lines 24 and 25	250,198	55,216		196,012
27	Subtract line 26 from line 12				
a	**Excess of revenue over expenses and disbursements**	(9,344)			
b	**Net investment income** (if negative, enter -0-)		185,638		
c	**Adjusted net income** (if negative enter -0-)			0	

Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)

			Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing	21,057	11,513	
	2	Savings and temporary cash investments			
	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 (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶			
		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 (attach schedule)			
	b	Investments - corporate stock (attach schedule)			
	c	Investments - corporate bonds (attach schedule)			
	11	Investments - land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach schedule) ▶			
	12	Investments - mortgage loans			
	13	Investments - other (attach schedule)			
	14	Land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach schedule) ▶			
	15	Other assets (describe ▶ STM120)	85,473	85,473	2,025,000
	16	**Total assets** (to be completed by all filers - see the instructions Also, see page 1, item I)	106,530	96,986	2,025,000
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 (attach schedule) STM123	24,240	24,040	
	22	Other liabilities (describe ▶)			
	23	**Total liabilities** (add lines 17 through 22)	24,240	24,040	
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here ▶ ☐ 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 ▶ ☒ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	82,290	72,946	
	30	**Total net assets or fund balances** (see instructions)	82,290	72,946	
	31	**Total liabilities and net assets/fund balances** (see instructions)	106,530	96,986	

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	82,290
2	Enter amount from Part I, line 27a	2	(9,344)
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	72,946
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	72,946

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				
b				
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				
b				
c				
d				
e				

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				
b				
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	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) (see instructions) If (loss), enter -0- in Part I, line 8	3	

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	193,544	2,452,595	0.078914
2013	173,661	1,853,605	0.093688
2012	204,249	1,857,855	0.109938
2011	160,289	1,724,352	0.092956
2010	149,851	1,641,098	0.091311

2	**Total** of line 1, column (d)	2	0.466808
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	0.093362
4	Enter the net value of noncharitable-use assets for 2015 from Part X, line 5	4	2,001,845
5	Multiply line 4 by line 3	5	186,896
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	1,856
7	Add lines 5 and 6	7	188,752
8	Enter qualifying distributions from Part XII, line 4	8	196,012

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	1	1,856
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-)	2	0
3	Add lines 1 and 2	3	1,856
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0
5	**Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-	5	1,856
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 2,000		
d	Backup withholding erroneously withheld — 6d		
7	Total credits and payments. Add lines 6a through 6d	7	2,000
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ 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	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	144
11	Enter the amount of line 10 to be **Credited to 2016 estimated tax** ▶ Refunded ▶	11	144

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?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)?	1b		X
	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?	1c		
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year **(1)** On the foundation ▶ $ ______ **(2)** On foundation managers ▶ $ ______			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ ______			
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	2		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	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T	5		X
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?	6		
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	7		
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ CA			
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	8b		
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	9		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

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?	13	X	

Website address ▶ STRATTON-PETITFOUNDATION.ORG

14 The books are in care of ▶ RANDY BELLOUS Telephone no ▶ 818-835-9728

Located at ▶ 21912 DE LA GUERRA, WOODLAND HILLS, CA ZIP+4 ▶ 91364

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

			Yes	No
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?	16		
	See the instructions for exceptions and filing requirements for FinCEN Form 114 If "Yes," enter the name of the foreign country ▶			

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? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ 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)? ☐ Yes ☒ 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) ☐ Yes ☒ 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)?	1b		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
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? ☐ Yes ☒ 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)	2b		X
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? ☐ Yes ☒ 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)	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

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)? **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? ☐ 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** No: 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? **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 (see instructions).

(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
RANDY BELLOUS 21912 DE LA GUERRA, CA 91364	CEO 7.00	STMA01 0	0	0
DANIEL SOSIN 4252 COLT ROAD, LAS CRUCES, NM 88011	SECRETARY 4.00	0	0	0
MICHAEL I FROCH 24755 CALLE SERRANONA, CA 91302	CFO 3.00	0	0	0

2 Compensation of five highest-paid employees (other than those included on line 1 - see instructions). 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

Part VIII **Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** (continued)

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE."

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

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	
2	
3	
4	

Part IX-B **Summary of Program-Related Investments** (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments See instructions 3	
Total. Add lines 1 through 3 ▶	

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	0
b	Average of monthly cash balances	1b	7,330
c	Fair market value of all other assets (see instructions)	1c	2,025,000
d	**Total** (add lines 1a, b, and c)	1d	2,032,330
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) — 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	2,032,330
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	30,485
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	2,001,845
6	**Minimum investment return.** Enter 5% of line 5	6	100,092

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	100,092
2a	Tax on investment income for 2015 from Part VI, line 5	2a	1,856		
b	Income tax for 2015 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	1,856
3	Distributable amount before adjustments Subtract line 2c from line 1			3	98,236
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	98,236
6	Deduction from distributable amount (see instructions)			6	
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1			7	98,236

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	196,012
b	Program-related investments - total from Part IX-B	1b	
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	196,012
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 (see instructions)	5	1,856
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	194,156

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

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					98,236
2 Undistributed income, if any, as of the end of 2015:					
a Enter amount for 2014 only					
b Total for prior years: ____, ____, ____					
3 Excess distributions carryover, if any, to 2015					
a From 2010					
b From 2011	112,405				
c From 2012	111,356				
d From 2013	113,061				
e From 2014	97,857				
f **Total** of lines 3a through e		434,679			
4 Qualifying distributions for 2015 from Part XII, line 4: ► $ 196,012					
a Applied to 2014, but not more than line 2a					
b Applied to undistributed income of prior years (Election required - see instructions)					
c Treated as distributions out of corpus (Election required - see instructions)					
d Applied to 2015 distributable amount					98,236
e Remaining amount distributed out of corpus		97,776			
5 Excess distributions carryover applied to 2015 (If an amount appears in column (d), the same amount must be shown in column (a).)					
6 **Enter the net total of each column as indicated below:**					
a Corpus Add lines 3f, 4c, and 4e Subtract line 5		532,455			
b Prior years' undistributed income Subtract line 4b from line 2b					
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					
d Subtract line 6c from line 6b Taxable amount - see instructions					
e Undistributed income for 2014 Subtract line 4a from line 2a Taxable amount - see instructions					
f Undistributed income for 2015 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2016					
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)					
8 Excess distributions carryover from 2010 not applied on line 5 or line 7 (see instructions)					
9 **Excess distributions carryover to 2016.** Subtract lines 7 and 8 from line 6a		532,455			
10 Analysis of line 9					
a Excess from 2011	112,405				
b Excess from 2012	111,356				
c Excess from 2013	113,061				
d Excess from 2014	97,857				
e Excess from 2015	97,776				

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

1a 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)

	Tax year	Prior 3 years			(e) Total
	(a) 2015	(b) 2014	(c) 2013	(d) 2012	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
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))

NONE

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

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

c Any submission deadlines

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

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				
9 DOTS COMMUNITY LEARNING CENTER POST OFFICE BOX 461976 LOS ANGELES, CA 90046-8976	NONE	PC	EDUCATIONAL PROGRAMS	500
AMERICAN CANCER SOCIETY 2186 KNOLL DRIVE SUITE A VENTURA, CA 93003	NONE	PC	CANCER RESEARCH	220
COUNT BASIE THEATRE FOUNDATION 99 MONMOUTH STREET RED BANK, NJ 07701	NONE	PC	MUSIC AND THEATRE ARTS PROGRAMS	11,686
CONGREGATION NAHLET SHALOM 3606 RIO GRANDE BOULEVARD ALBUQUERQUE, NM 87101-3040	NONE	PC	SEPHARTIC FESTIVAL	2,000
EYE CARE 4 KIDS 6911 SOUTH STATE STREET MIDVALE, UT 84047-1239	NONE	PC	EYE CARE FUNDING PROGRAMS	14,850
GUIDE DOGS OF AMERICA 13445 GLENOAKS BOULEVARD SYLMAR, CA 91342-2049	NONE	PC	TRAINING OF SEEING EYE DOGS FOR THE BLIND	500
JEWISH WAR VETERANS 22048 SHERMAN WAY CANOGA PARK, CA 91303	NONE	PC	SUPPORT FOR VETERANS HOME	13,000
KCDE CHILDRENS PROGRAMS 4155 DIXIE CANYON AVENUE SHERMAN OAKS, CA 91423	NONE	PC	CHILDRENS PROGRAMS	5,000
Total . . . . ▶ 3a				
b Approved for future payment				
Total . . . . ▶ 3b				

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				
NATIONAL ALLIANCE 4 THE MENTALLY IL 3803 NORTH FAIRFAX DRIVE SUITE 100 ARLINGTON, VA 22203-5860	NONE	PC	GRANT - PEGGY & MAC ANDERSON WALKATHON FUNDING	1,000
NMSU TENNIS PROGRAM POST OFFICE BOX 30001 LAS CRUCES, NM 88003	NONE	PC	NET RESULTS PROGRAM	2,000
OUR RESCUE 700 NORTH VALLEY STREET B ANAHEIM, CA 92801	NONE	PC	SUPPORT PROGRAMS AGAINST CHILD SEX TRAFFICING	10,000
REGISTER 9 PRODUCTIONS 20841 VENTURA BOULEVARD 187 WOODLAND HILLS, CA 91364-2319	NONE	NC	CHARITBLE PROGRAM MEDIA PRODUCTIONS	5,000
SANTA MONICA COLLEGE FOUNDATION 1900 PICO BOULEVARD SANTA MONICA, CA 90405-1628	NOINE	PC	ADMINISTRATIVE PROCESSING FEES	800
SM CHAMBER OF COMMERCE 1234 6TH STREET 100 SANTA MONICA, CA 90401	NONE		ARTS & MUSIC PROGRAM AWARENESS FUNDING	250
SMC ARTS FELLOWSHIP 1900 PICO BOULEVARD SANTA MONICA, CA 90405-1628	NONE	PC	ART FELLOWSHIP	2,000
SMC ASSOCIATES 1600 PICO BOULEVARD SANTA MONICA, CA 90405-9867	NONE	PC	ARTS MEMORIAL FUND	1,000
Total . . . . . . ► 3a				
b Approved for future payment				
Total . . . . . . ► 3b				

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				
SMC DALE RIDE 1900 PICO BOULEVARD SANTA MONICA, CA 90405-1628	NONE	PC	INTERSHIP PROGRAM	7,500
SMC EMERITUS ARTS 1900 PICO BOULEVARD SANTA MONICA, CA 90405-1628	NONE	PC	ARTS PROGRAM FUNDING	2,000
SMC FOREIGN STUDENT 1900 PICO BOUELVARD SANTA MONICA, CA 90405-1628	NONE	PC	FOREIGN STUDENT ASSISTANCE PROGRAMS	2,000
SMC GRAPHICS PROGRAM 1900 PICO BOULEVARD SANTA MONICA, CA 90405-1628	NONE	PC	EDUCATIONAL PROGRAMS	3,000
SMC MUSIC FELLOWSHIP AWARDS 1900 PICO BOULEVARD SANTA MONICA, CA 90405-1628	NONE	PC	MUSIC EDUCATION PROGRAMS	2,000
SMC STUDENTS WITH DISABILITIES 1900 PICO BOULEVARD SANTA MONICA, CA 90405-1628	NONE	PC	SUPPORT PROGRAMS FOR DISABLED STUDENTS	2,000
SMC THEATRE ARTS 1900 PICO BOULEVARD SANTA MONICA, CA 90405-1628	NONE	PC	PROGRAM & BENEFIT FUNDING	2,000
SOCIETY FOR CRYPTO JUDAIC STUDIES 1813 9TH STREET SANTA MONICA, CA 90404	NONE	PC	PROGRAM FUNDING	4,500
Total . . . . ▶ 3a				
b Approved for future payment				
Total . . . . ▶ 3b				

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				
START AGAIN MINISTRIES 1070 TIMBRIDGE LANE ARGYLE, TX 76226-8275	NONE	PC	MUSIC PROGRAMS	1,000
TEAM PRIME TIME 3740 OVERLAND AVENUE F LOS ANGELES, CA 90034	NONE	PC	AFTER SCHOOL PROGRAM FUNDING	2,000
UCLA HILLEL 574 HILGARD AVENUE LOS ANGELES, CA 90024	NONE	PC	ARTS PROGRAM	2,000
YARLUNG ARTISTS 10920 WILSHIRE BOULEVARD 150 LOS ANGELES, CA 90024-6502	NONE	PC	STUDENT MUSIC FUNDING	19,073
CA NARCOTIC OFFICERS' ASSN 28245 AVENUE CROCKER 230 VALENCIA, CA 91355-1201	NONE	PC	DONATION	200
CALIFORNIA ALPHA ASSN/PHI DELTA THE 2726 CHANNING WAY BERKELEY, CA 94704-2420	NONE	PC	BENEFIT PROGRAM	560
CALIFORNIA NARCOTIC OFFICERS' ASSN 28245 AVEUE CROCKER VALENCIA, CA 91355-1201	NONE	PC	GRANT - NARCOTIC PROGRAMS	200
CHILD DEVELOPMENT INSTITUTE 6340 VARIEL AVENUE A WOODLAND HILLS, CA 91367-2514	NONE	PC	GRANT ANNUAL FUNDRAISER	250
Total ▶ 3a				
b Approved for future payment				
Total ▶ 3b				

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				
FAWN PARK 39221 N. SHORE DRIVE FAWNSKIN, CA 92333	NONE	PC	GRANT - RECREATIONAL PROGRAMS RE SOCIN	1,500
HOMENETMEN GLENDALE 3347 N SAN FERNANDO RD LOS ANGELES, CA 90065	NONE	PC	ANNUAL RED POPPY EVENT	6,000
LIFE'S GREAT MOMENTS P.O. BOX 742 BROOKINGS, SD 57006	NONE	PC	GRANT - OPERATION GRATITUDE	1,326
NMSU TENNIS PROGRAM P.O. BOX 30001 LAS CRUCES, NM 88003	NONE	PC	GRANT - 5TH GRADE RWANDA LITERACY PROJECT	3,000
PTA NJ CONGRESS OF PARENTS & TEACHE 8 QUAKERBRIDGE PLAZA SUITE F TRENTON, NJ 08619-1255	NONE	PC	GRANT - 5TH GRADE RWANDA LITERACY PROJECT	3,000
SMC - RANDY & LINDA BELLOUS SCHOLAR 1900 PICO BLVD. SANTA MONICA, CA 90405	NONE	PC	GRANT - RANDY & LINDA BELLOUS SCHOLARSHIP	500
THE EISENHOWER FOUNDATION 1875 CONNECTICUT AVE NW STE 410 WASHINGTON, DC 20009-5737	NONE	PC	GRANT - MISCELLANEOUS	2,000
DONG EUI NAN DAI 16545 VENTURA BLVD 24 ENCINO, CA 91436-4521	NONE	PC	GRANT - PUBLIC EDUCATION	2,000
Total . . . . ▶ 3a				
b Approved for future payment				
Total . . . . ▶ 3b				

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				
LA X ARTS 7000 SANTA MONICA BLVD LOS ANGELES, CA 90058	NONE		GRANT ART PROGRAMS	2,000
MUSIC WEST INC 915 EUCALYPLUS DRIVE EL SEGUNDO, CA 90245	NONE	PC	GRANT - STUDENT PROGRAMS	5,500
AMERICAN FED OF POLICE & CONC CTZNS PO BOX 83838+ PHOENIX, AZ 85071	NONE	PC	PROGRAMS AND SERVICES	52
SMC BELLOUS DISABLED STUDENT SCLRSP 1900 PICO BLVD. SANTA MONICA, CA 90405	NONE	PC	PROVIDE SCHLRSHPS FOR DISABLED STUDENTS	2,000
Total ▶ 3a				148,967
b Approved for future payment				
Total ▶ 3b				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities					
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property	531120		12		
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory					
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a					
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)					

13 **Total.** Add line 12, columns (b), (d), and (e) . . . 13

(See worksheet in line 13 instructions to verify calculations)

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)
01A	NOT APPLICABLE
05B	CSH FLW FRM INVSTMT RNTL INCOME IS THE SOLE INCOME SOURCE

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

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

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

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

RANDY BELLOUS 05-05-2016 PRESIDENT

Signature of officer or trustee Date Title

May the IRS discuss this return with the preparer shown below (see inst)? ☒ Yes ☐ No

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
RONALD J KLEKER CPA	RONALD J KLEKER CPA	01-18-2017		P01071158

Firm's name ▶ KLEKER ACCOUNTING SERVICES Firm's EIN ▶

Firm's address ▶ 23241 VENTURA BLVD SUITE 310 WOODLAND HILLS CA 91364 Phone no 818-225-9970