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# Form **990-PF**

**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. Department of the Treasury Internal Revenue Service

OMB No 1545-0052 Open to Public Inspection

For caler	idar year 2015 or tax year beginning MAY	1, 2015	, and ending	APR 30, 2016	<u> </u>
Name of	foundation			A Employer Identificatio	n number
cum	GART FAMILY FOUNDATION			56-2230054	1
	and street (or P O box number if mail is not delivered to street	address)	Room/suite	B Telephone number	<u> </u>
	4 LONG MEADOW LANE		1,00,000	336-765-96	561
	own, state or province, country, and ZIP or foreign po	nstal rode		C If exemption application is	
•	STON-SALEM, NC 27106	osiai oodo		i exemption application is	pending, check hare
	call that apply: Initial return	Initial return of a fo	rmer public charity	D 1. Foreign organization	ns. check here
• 000.	Final return	Amended return	,		
	Address change	Name change		Foreign organizations m check here and attach c	eeting the 85% test, computation
H Check	type of organization: X Section 501(c)(3) ex	empt private foundation		  E   If private foundation st	
		Other taxable private founda	ıtıon	under section 507(b)(1	
I Fair ma	arket value of all assets at end of year   J   Accounting	ng method: X Cash	Accrual	F If the foundation is in a	60-month termination
(from	Part II, col. (c), line 16)	her (specify)		under section 507(b)(1	
<b>\$</b>	327 , 383 . (Part I, colu	mn (d) must be on cash b	basis.)		· <del></del>
Part I	Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not	(a) Revenue and	(b) Net investment	(c) Adjusted net	(0) Disbursements for charitable purposes
	necessarily equal the amounts in column (a) )	expenses per books	income	income	(cash basis only)
1	Contributions, gifts, grants, etc., received	73,500.		N/A	<del>                                     </del>
2	Check Interest on savings and temporary	201	201		CMAMEMENT 1
3	cash investments	391.	391. 9,141.		STATEMENT 1 STATEMENT 2
4	Dividends and interest from securities	9,141.	7,141.		STATEMENT 2
	Gross rents				<del>-</del>
1.	Net rental income or (loss)	34,277.			
<b>(2)</b>	Net gain or (loss) from sale of assets not on line 10 Gross sales price for all 125,708.	34/2//		· · · ·	
<b>See 7</b>	Capital gain net income (from Part IV, line 2)		34,277.		
2 <u>0</u> 8	Net short-term capital gain				
A Revenue	Income modifications				
U 10a	Gross sales less returns and allowances				
	Less Cost of goods sold				
r=   c	Gross profit or (loss)				<u> </u>
<b>№</b> 11		7,323.	7 323	100 100/	STATEMENT 3
<del>1</del> 2	Total. Add lines 1 through 11	124,632.	51,13.2	50,10 1851	
2016	Compensation of officers, directors, trustees, etc	0.	1851 30		0.
1	Other employee salaries and wages		18	No.	<del> </del>
9 15 16	Pension plans, employee benefits		18 OGO		
30 108	Legal fees Accounting fees STMT 4	3,500.	1,750.	-	1,750.
Š,	Other professional fees	3/3000	<u> </u>	<del></del>	
ш 17 § 17					
18	Taxes STMT 5	1,171.	17.		0.
19	Depreciation and depletion				
Ē 20	Occupancy				
¥ 21	Travel, conferences, and meetings			<u> </u>	
E 22	Printing and publications	352.	0.		352.
<u>ව</u> 23	Other expenses STMT 6	4,036.	3,164.		872.
Operating and Administrative Expense 11 18 15 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5	Total operating and administrative	0.050	4 001		0.054
be	expenses. Add lines 13 through 23	9,059.	4,931.	· · · · · · · · · · · · · · · · · · ·	2,974.
25	Contributions, gifts, grants paid	138,035.			138,035.
26	Total expenses and disbursements.	147,094.	4,931.		141,009.
	Add lines 24 and 25 Subtract line 26 from line 12:	141,034.	=,3J1.	<u>'</u>	141,003.
	Subtract line 25 from line 12.  Excess of revenue over expenses and disbursements	<22,462.	<b>&gt;</b>		
- 1	Net investment income (if negative, enter -0-)	122, 1021	46,201.		
	Adjusted net income (if negative, enter -0-)			N/A	
523501 11-24-15		instructions.		-	Form <b>990-PF</b> (2015)

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 ye	
Column should be for the original amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
↑ Cash - non-interest-bearing	40 505		
2 Savings and temporary cash investments	42,705.	83,738.	<u>83,738.</u>
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			<del></del>
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 7	429,487.	365,992.	243,645.
c Investments - corporate bonds		·	
11 Investments - land, buildings, and equipment basis			
Less accumulated depreciation			
12 Investments - mortgage loans			
13 Investments - other			
14 Land, buildings, and equipment; basis ▶		ļ	
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)	472,192.	449,730	327,383.
17 Accounts payable and accrued expenses			
18 Grants payable			
9 19 Deferred revenue			
20 Loans from officers, directors, trustees, and other disqualified persons 21 Mortgages and other notes payable			
21 Mortgages and other notes payable			
22 Other liabilities (describe >)			
23 Total liabilities (add lines 17 through 22)	0.	0.	
Foundations that follow SFAS 117, check here	ĺ		
and complete lines 24 through 26 and lines 30 and 31.			
24 Unrestricted			
5   25 Temporarily restricted			
26 Permanently restricted			
Foundations that do not follow SFAS 117, check here			
and complete lines 27 through 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 30 Total net assets or fund balances	0.	0.	
28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
29 Retained earnings, accumulated income, endowment, or other funds	472,192.	449,730.	
30 Total net assets or fund balances	472,192.	449,730.	
31 Total liabilities and net assets/fund balances	472,192.	449,730.	
Part III Analysis of Changes in Net Assets or Fund Ba	alances		
		<del></del>	<del></del>
1 Total net assets or fund balances at beginning of year - Part II, column (a), line 3	50		477 100
(must agree with end-of-year figure reported on prior year's return)		1	472,192.
2 Enter amount from Part I, line 27a		2	<22,462.>
3 Other increases not included in line 2 (itemize) ►		3	0.
4 Add lines 1, 2, and 3		ايا	חבני נועו
		4	449,730.
5 Decreases not included in line 2 (itemize)   Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, col	lump (h) line 30	4 5 6	449,730.

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1 ,								1	i
Form 990-PF (2015) SHU	GART FAMILY FOU	NDATION	_			5	6-223	0054	Page 3
(a) List and desc	and Losses for Tax on I cribe the kind(s) of property sold (e. arehouse; or common stock, 200 st	g., real estate,	Income	( <b>b</b> ) H	low acquired - Purchase - Donation		acquired day, yr.)	(d) Dat (mo., d	
1a									
b SEE ATTACHED	STATEMENT								
<u> </u>				1					
<u>d</u>									
_e	T			$\Box$					
(e) Gross sales price	(f) Depreciation allowed (or allowable)		st or other basis expense of sale				Sain or (loss) is (f) minus (		
	(or anomable)	p.000			<u>-</u>	(0) più	<del>- (1) 1111111111111111111111111111111111</del>		
<u>a</u> b				-					<del></del>
C									
<u>d</u>		<del> </del>	******			<del></del> -			
e 125,708.			91,43	1.				34	,277.
	ng gain in column (h) and owned by	the foundation				(I) Gains (C	Col. (h) gaın		<u>,                                    </u>
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69		cess of col. (i) col. (j), if any			ol. (k), but	not less than (from col. (	n -0-) or	
a									
b									
C									
d		ļ							
<u>e</u>								34	<u>,277.</u>
2 Capital gain net income or (net c	apıtal loss) {   If gaın, also ente   If (loss), enter -	er in Part I, line 0- in Part I, line	7 7	}	2			34	,277.
3 Net short-term capital gain or (lo If gain, also enter in Part I, line 8,	, column (c).	ınd (6);		}			N / N		
If (loss), enter -0- in Part I, line 8  Part V Qualification U	Jnder Section 4940(e) fo	r Reduced	Tay on Net	Inv	3   estment In	come	N/A		
<u> </u>								·	
(For optional use by domestic privat	te foundations subject to the section	4940(a) tax on	i net investment ir	icome	·-)				
If section 4940(d)(2) applies, leave t	this part blank.								
Was the foundation liable for the sec	ction 4942 tax on the distributable a	mount of any v	ear in the base per	riod?				Yes	X No
If "Yes," the foundation does not qua									
1 Enter the appropriate amount in	each column for each year; see the	instructions be	fore making any e	entries					
(a) Base period years Calendar year (or tax year beginn	(b) ling in) Adjusted qualifying di	stributions	Net value of no	(c) onchar	itable-use asse	ts	Dıstrıb (col. (b) dıv	( <b>d)</b> ution ratio ided by col.	(c))
2014		47,417.	<u> </u>		<u>529,71</u>				<u> 78295</u>
2013		67,200.			609,98				<u>74105</u>
2012		90,149.			711,32				<u>67316</u>
2011		<u>74,454.</u>			891,98				<u>07689</u>
2010		<u>32,962.</u>		1_	<u>,093,35</u>	0.		• 31	<u>04534</u>
								1 4	21020
2 Total of line 1, column (d)	E year book pariod - duido the total	Lon line 2 hu F	or by the number	r of wa	are	2	<del>                                     </del>	⊥•4.	<u>31939</u>
3 Average distribution ratio for the		i on line 2 by 5,	or by the number	or ye	ais	3		2	86388
the foundation has been in existe	ence ii iess man o years					-3-		. 20	<u> </u>
4 Enter the net value of noncharita	ble-use assets for 2015 from Part X	, line 5				4_	<u> </u>	385	,769.
5 Multiply line 4 by line 3						5		110	<u>,480.</u>

6 Enter 1% of net investment income (1% of Part I, line 27b)

7 Add lines 5 and 6

7 110,942.

8 Enter qualifying distributions from Part XII, line 4

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.

Tall Exempt operating foundations described in section 4940(g)(2), howeshere ▶ and enter **IW** on a his 1.  Date of ruling or determination latter:  (attach copy of letter if in secessary read in the restrictions) (attach copy of letter if in secessary read in the restrictions) of Part I, line 27b  of Part I, line 27b  of Part I, line 27b  A did net and order the section 4947(g)(1) trusts and taxable foundations only. Others enter -0;  2 Tax under section 511 (domestic section 4947(g)(1) trusts and taxable foundations only. Others enter -0;  3 4 452.  4 Subtlish A (norme) tax (domestic section 4947(g)(1) trusts and taxable foundations only. Others enter -0;  5 Tax based on investment income. Subtract line 4 from him 3; if zero or less, enter -0.  5 Tax based on investment income. Subtract line 4 from him 3; if zero or less, enter -0.  5 Tax based on investment income. Subtract line 4 from him 3; if zero or less, enter -0.  5 Tax based on investment income. Subtract line 4 from him 3; if zero or less, enter -0.  5 Tax based on investment income. Subtract line 4 from him 3; if zero or less, enter -0.  6 Crodis/Payments:  2 2015 estimated tax payments and 2014 overpayment credited to 2015  6 Ea 920.  5 Ea 920.  6 Ea 920.  6 Ea 920.  6 Ea 920.  7 Total credits and payments. Add in some tax him in 2.  6 Ea 920.  7 Total credits and payments. Add in six sat brough 6d  8 Enter any peasity for underpayment of estimated tax. Check here — if form 2220 is attached 9  7 Total credits and payments. Add in six more than him; retire an out of each of the subtract of th	_	990-PF (2015) SHUGART FAMILY FOUNDATION 56-2 rt VI . Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 -	22300 see ins			Page 4 ns)
Date of ruling or determination letter: (attach copy of letter if necessary see instructions)  b Domestic undustations that meta the section 4940(e) requirements in Part V, click here ≥						
b Domestic foundations that met the section 4940(e) requirements in Part V, check here						
of Part I, line 27b c All other domestic boundations enter 2% of Inne 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 Subtitie A (income) lax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)  5 Tax based on investment lineome. Subtract line of from line 3.1 factor or less, enter -0-  6 Greditch?**priments:  a 2015 setimated tax payments and 2014 overpayment credited to 2015  5 Exempt foreign organizations - tax withheld at source  6 Tax paid with application for extension of time to file (form 8868)  6 Edit any penalty for underpayment of estimated tax. Otheck here					4	62.
c All other domestic foundations enter 2% of Iner 27b. Exempt foreign organizations enter 4% of Part I, Iner 12, col. (b).  2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)  3 4 62.  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:  2 2015 estimated tax payments and 2014 overpayment credited to 2015  8 a 920 .  8 a 920 .  8 a 920 .  8 b Empt foreign organizations - tax withheld at source  1 Tax pad withholding erroneously withheld  7 Total credits and payments. Add lines 5 ath frough 6d  8 Children's penalty for underpayment of estimated tax. Check here if the 10 total of lines 5 and 8 is more than line 7, enter amount owed  9 Tax due, If the total of lines 5 and 8 is more than line 7, enter amount owed  10 Overayment, If line it is more than line 10, the size 5 and 8, enter the amount owerpaid  11 Enter the amount of line 10 to be, Credited to 2016 estimated tax ► 458 . Retunded ► 11  9 Tax due, If the total of lines 5 and 8 is more than line 7, enter amount owed  10 Enter the amount of line 10 to be, Credited to 2016 estimated tax ► 458 . Retunded ► 11  10 uning the tax year, did the foundation attempt to millivence any national, state, or local legislation or did it participate or interviene in any political campagin?  10 but it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)?  11 If the answer is "Yes" to 1 a or 18, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities  12 In the state of the foundation on connection with the activities  13 Has the foundation his Part 11 to 10 this year?  14 Enter the amount of any of startch a conformation of the schribes.  15 Are the requirements of section of this	-					<u></u>
2 Tax under section 511 (domeshic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 3 Add lines 1 and 2 4 Subtitie A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 5 Tax based on investment lincome. Subtract line 4 from line 3.1 trars or less, enter -0- 5 Circlutis-gynamics: a 2015 estimated tax payments and 2014 overpayment credited to 2015 b Exempt throngon organizations - tax withheld at source c Tax paid with application for extension of time to file (Form 8868) d Backup withholding corrocusty withheld 7 Total credits and payments. Add lines 63 through 64 8 Enter any peaalty 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 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 the. Crediteflet a 2016 estimated tax. 12 Dump the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or interverse in any object accompany?  b Did it spend more than \$100 during the year (either directly or indirectly) for policial purposes (see instructions for the definition)?  If the answers "Yes" to 12 or 16, attach a defailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities 10 United to foundation (if any) of tax on policial espenditures (section 4955) imposed during the year:  10 On the Soundation, IP S O	C	· · · · · · · · · · · · · · · · · · ·				
4 Subtle 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 Credit/Payments: a 2015 estimated tax payments and 2014 overpayment credited to 2015 b Exempt foreign organizations - tax withheld at source c Tax pad with applications - tax withheld at source 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 I if Form 2220 is attached 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 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 Center the amount of line 10 be; Credited tag 2015 estimated tax lines 10 overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 12 During the tax year, did the foundation attempt to mitience any national, state, or local legislation or did it participate or intervere in any political payment in the definition? 12 If the answer is "Ves" to 1e or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in erone in 120-POI, for this year?  1 Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year? 1 If "Yes," attach a detailed description of the activities 1 If "Yes," attach a life attace the						0.
5 Tax based on Investment Income. Subtract line 4 from line 3. If zero or less, enter -0- 6 Credits/Payments: 2015 estimated tax payments and 2014 overpayment credited to 2015 b Exempt foreign organizations - tax withheld at source 1 Tax paid with application for extension of time to left (efform 8868) 6 Backup withholding erroneously withheld 7 Total credits and payments. Add lines 6 at 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, line 7 is more than the total of lines 5 and 8, enter the amount overpald 11 Enter the amount of line 10 to be: Credited to 2016 estimated tax 12 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? 12 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? 13 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? 15 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? 16 Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? 16 If the answer is "Yes" to 1 a or 10, attach a defailed description of the activities 10 Did it spend more than \$100 during the year (either directly or indirectly) for political expenditure tax imposed on foundation managers. \$ \$ 0. (2) On foundation managers. \$ \$ 0. (2) On foundation managers. \$ \$ 0. (2) On foundation managers. \$ \$ 0. (3) On the similar instruments of the sace in the second of the activities of the scale year changes, not previously reported to the IRS? 16 Yes, "tatch has a	3	Add lines 1 and 2			4	62.
6 Credis/Payments: a 2015 estimated tax payments and 2014 overpayment credited to 2015 b Exempt foreign organizations: - tax withheld at source c Tax pad 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 the total of lines 5 and 8, enter the amount overall 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpall 11 Enter the amount of line 10 to be: Credited to 2015 estimated tax	4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)				0.
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b Exempt foreign organizations - tax withheld at source c Tax paid with application for extension of time to file (Form 8868) d Backup withholding erroreously withheld d Backup withholding erroreously withheld d Backup withholding erroreously withhold d Be file any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached  8 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 owerpald 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount owerpald 11	6	Credits/Payments:				
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d Backup withholding erroneously withheld 7 Total credits and payments. Add lines 6a through 64 8 Enter any penalty for underpayment of estimated tax. Check here	b	Exempt foreign organizations - tax withheld at source				
7 Total credits and payments. Add lines 6a through 64 8 Enter any penalty for underpayment of estimated tax. Check here	C	Tax paid with application for extension of time to file (Form 8868)				
8 Enter any penalty for underpayment of estimated tax. Check here	d	Backup withholding erroneously withheld 6d				
9 Tax due. If the total of tines 5 and 8 is more than tine 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: Oredited to 2016 estimated tax ▶  12 Enter the amount of line 10 to be: Oredited to 2016 estimated tax ▶  13 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? 13 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? 14 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? 14 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? 15 During the tax year, did the foundation attempt to the flerethy or indirectly) for political expenditures or intervene in any political expenditures or indirectly or indirectly) for political expenditures and copies of any materials published or distributed by the foundation me connection with the activities 2 During the activities and copies of any materials published or distributed by the foundation materials (section 4955) imposed during the year: 2 During the terminal political expenditure tax imposed on foundation managers. ► \$ Question of the activities. 2 During the terminal political expenditure tax imposed on foundation managers. ► \$ Question of the activities. 3 During the reminal political expenditure tax imposed on foundation managers. ► \$ Question of the activities. 4 During the flow of the state of the political expenditure tax imposed on foundation managers. ► \$ Question of the activities. 4 During the flow of the state of the political expenditure tax imposed on foundation, or bylaws, or other similar instruments? If "Yes	7	Total credits and payments. Add lines 6a through 6d			9	20.
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Part VII-A   Statements Regarding Activities	10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			4	
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8a Enter the states to which the foundation reports or with which it is registered (see instructions)  NC  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  9 X	7			-		<u> </u>
NC 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 9 X	′	Did the logituation have at least \$5,000 in assets at any time during the year? If you, complete i air in, con top, and i air in				
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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  9 X	h	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate)				
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				8b	х	
year 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)? If "Yes," complete Part XIV	a					
	3			9		X
	10			10		

Form **990-PF** (2015)

11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section \$12(h)(3)? If "Yes," attach schedule (see instructions)?  11 Dot the foundation make a distribution has donor advised find over which the foundation or a dequaliting person had advisory privileges?  12 X  13 IX  15 Dot the foundation comply with the public inspection requirements for its annual returns and exemption application?  Website address ► N/A  17 The books are care of ► GROVER F. SHUGART, JR. Telephone no. ►336-765-9661.  Located at ► 221 JONESTOWN ROAD, WINSTON-SALEM, NC  27P4 ►271.04  15 Section 487(1/0) fromezempt retarble timsis fields of from 941-1-check here and enter the amount of tax-exempt interest received or accread during the year  18 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 intanced account in a foreign country?  See the instructions for exceptions and filing requirements for finOCN Form 114, If "Yes," enter the name of the foreign country.  See the instructions for exceptions and filing requirements for finOCN Form 114, If "Yes," enter the name of the foreign country.  See the instructions for exceptions and filing requirements for finOCN Form 114, If "Yes," enter the name of the foreign country.  Yes IX No.  18 Dorrow money from, lend money to, or otherwise extend credit to (or accept them from) a disqualified person?  19 Furnish goods, services, or facinities to for except them from) a disqualified person?  19 Furnish goods, services, or facinities to (or accept them from) a disqualified person?  19 Furnish goods, services, or facinities to (or accept them from) a disqualified person?  10 Finansing any secone or assets to a disqualified person (or make any of either available to the benefit or or so at a disqualified person?  10 Finansing any secone or assets to a dequalified person (or make any of either available)  10 Finansing and provident the receive			Т	Yes	No
section 52(b)(13)? If Ves, a table schedule (see instructions)  10 did the foundation make a distribution to a dions advest fund over which the foundation or a disqualified person had advisory privileges?  11		At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of		res	NO
12 Did the foundation make a distribution to a disroulation or a disqualified person had advisory privileges?  13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?  14 The books are in circle of PROVER F. SHUGART, JR. Telephone no. ▶ 336-765-9661  15 Section 4947(3) nonexempt facinitable trusts filing form 390-F in tile of Form 1041-Check here and enter the amount of twe-exempt interest received or accrued during the year  15 A lany time during cleandar 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 A lany time during cleandar 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?  18 Part VII-B Statements Regarding Activities for Which Form 114. If "yes," enter the name of the farman country.  19 Formating the year did the foundation (either directly or indirectly):  10 Engage in the sace or exchange, or leasing of property with a disqualified person?  21 Burnish goods, servoes, or facilities to (or accept them from) a disqualified person?  23 Furnish goods, servoes, or facilities to (or accept them from) a disqualified person?  24 Pay compensation to, or pay or remburse the expenses of, a disqualified person?  25 Furnish goods, servoes, or facilities to (or accept them from) a disqualified person?  26 Pay compensation to, or pay or remburse the expenses of, a disqualified person?  27 Expense to pay money or cynoperty to a government official? (Exception, Check 'No' free foundation of government service, if terminality with 90 days.)  28 I may answer is "se's to 15 (17)-(6), did any of the acts fast to qualify under the exceptions described in Regulations section 3494(16):3 or in a current notice regarding dissater assistance (see instructions)?  29 Carea to pay many of the acts fast to qualify under the exceptions described in Re	"	·	,,		Y
If Yes, attach statement (see instructions)  If the boundation comply with the public inspection requirements for its annual returns and exemption application?  Website address ▶ N/A  15 The books are in care of ▶ GROVER F. SHUGART, JR.  Located at ▶ 221 JONESTOWN ROAD, WINSTON-SALEM, NC  15 Section 4947(a)(1) increampt charitable trusts filing form \$90-PF in level of Form 1041 - Check here and enter the amount of tax-eventy interest received or accrued during the year  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 or der 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 foundation have an interest in or a signature or other authority over a bank, securities, or or der financial account in a foreign country?  Form VII-B Statements Regarding Activities for Which Form 4720 May Be Required  FIRE Form 4720 if any Item is checked in the "Yes" column, unless an exception applies.  Fire Form 4720 if any Item is checked in the "Yes" column, unless an exception applies.  Fire Form 4720 if any Item is checked in the "Yes" column, unless an exception applies.  Fire Form 4720 if any Item is checked in the "Yes" column, unless an exception applies.  Fire Form 4720 if any Item is checked in the "Yes" column, unless an exception applies.  Fire Form 4720 if any Item is checked in the "Yes" column, unless an exception applies.  Fire Form 4720 if any Item is checked in the "Yes" column, unless an exception applies.  Fire Form 4720 if any Item is checked in the "Yes" column, unless an exception applies.  Fire Form 4720 if any Item is checked in the "Yes" column, unless an exception applies.  Fire Form 4720 if any Item is checked in the "Yes" column, unless an exception applies.  Fire Form 4720 if any Item is checked in the "Yes" column, unless an exception applies.  Fire Form 4720 if any Item is checked in the "Yes" column, unless an	19		<del>  '''</del>		
13   Multi-foundation comply with the public registrents for its annual returns and exemption application?   13   X	12		12		x
Website address ► N/A  If he books are in care of ► GROVER F. SHUGART, JR.  Located at ► 221 JONESTOWN ROAD, WINSTON-SALEM, NC  15 Section 4947(a)(1) nonexempt charatable trusts fling from 790-PF in lite of Form 1041 - Check here and either the amount of tax-exempt interest received or accrued dumpt by ear  16. Alary time during calendar year 2015, did the foundation have an interest in or a signature or other analysis of the foundation foundation foundation for the instructions for exceptions and filing requirements for FinCEN Form 114. If 'Yes,' enter the name of the financial 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.  1 During they ever did the foundation (either directly or indirectly):  (1) Engage in the sale or exchange, or leasing of property with a disqualified person?  (2) Borrow money from, lead money to, or otherwise extend credit to (or accept it from)  a disqualified person?  (3) Firmshop odos, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or remitives the expenses of, a disqualified person?  (5) Transter any moome or assets to a disqualified person (or make any of either available for the boundation arread or make a grant to or to employ the official for a period after termination of government service, it terminating within 90 days.)  If any snower is 7'es to 16 1/16, old any of the acts tals to quality under the exceptions described in Regulations section 34.941(d):3 or in a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  If Yes, 1st the years is the foundation have any undistributed incomer (fines 6 d and 6e, Part XIII) for tax year(s) beginning before 20150 if Yes, 1st the years is period of the fo	13			x	
14. The books are micate of ▶ GROVER P. SHUGART, JR.    Located at ▶ 221 JONESTOWN ROAD, WINSTON—SALEM, NC   Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in heu of Form 1041 - Check here and where the amount of tax-exempt interest received or accrued during the year.    A lany himse during clained by are 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 form 1470 if any item is checked in the "Yes" column, unless an exception applies.   Part VII-B   Statements Regarding Activities for Which Form 4720 May Be Required   Filip Form 4720 if any item is checked in the "Yes" column, unless an exception applies.   1 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?   2 Biorrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?   Yes X No (4) Pay compensation to, or pay or reminibures the expenses of, a disqualified person?   Yes X 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 (or make any) of either available for the bonefit or use of a disqualified person (or make any) of either available for the bonefit or use of a disqualified person (or make any) of either available for the bonefit or use of a disqualified person (or make any) of either available for the boundation agreed to make a grant to or to employ the official for a period after termination of government service, it formination with 150 disables assistance (see instructions)?   A part to a pay money or proprety to a government official? (Exception, Check No distribution of povernment service, it and to a state of the second of the proprety of the acts fail to qualify under th					<b></b>
L coacted at ▶ 221 JONESTOWN ROAD, WINSTON-SALEM, NC  2/P-14 ▶ 271.0 4  15 Section 4947(a)(1) nonexempt charitable trusts filling form 930-PF in lev of Form 1041 - Check here and enter the amount of tax-exempt interest received or accreed during the year  16. Attay time during clainedar 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.  Part VIII-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.  19 Juring the year did the foundation (either directly or indirectly):  (1) Engage in the sale or exchange, or leasing of property with a disqualified person?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or remburs the expenses of, a disqualified person?  (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 (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the boundation agreed in make a grant to or to employ the official for a period after termination of government provides provides and the foundation of government provides provides and the provision of the provision of the provision of section 4942(a)(3) or an accurant notice regarding disaster assistance (see instructions)?  (6) Agree to pay money or property to a government official year level period period period period year in the foundation of expecting foundation defined in secretion 4942(a)(3) or	14		55-9	661	
15 Section 4947(a)(1) nonexempt charitable trusts limp form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year of the fundation 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 financial account in a foreign country?  File Form 4720 if any Item is checked in the "Yes" column, unless an exception applies.  1 a During the year of the foundation (either directly or indirectly):  1 (Finage in the sale or exchange, or leasing to property with a disqualified person?  2 (S) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  3 (Firmsh goods, services, or facilities to (or accept them from) a disqualified person?  4 (Pay compensation to, or pay or rembuse the expenses of, a disqualified person?  5 (Firmsh goods, services, or facilities to (or accept them from) a disqualified person?  6 (Payce to pay money or property to a government official? (Exception, Check 'No' of the boneful or use of a disqualified person)?  6 (Payce to pay money or property to a government official? (Exception, Check 'No' of the foundation agreed to make a grant to or to employ the official for a peniod after termandation of government service, it forming within 90 dispays.  5 (Firmsh goods, services, or facilities to describe the property or a government official? (Exception, Check 'No' of the foundation agreed to make a grant to or to employ the official for a peniod after termandation of government servers, it ferminating within 90 dispays.  5 (Firmsher any or an ourrent notice regarding disaster assistance check here  6 (D) Agree to pay money or property to a government official? (Exception, Check 'No' of the foundation engage in a prior year in any of the acts fait to qualify under the exceptions described in Regulations sectio					
No securities, or other hisancial account in a foreign country	15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here		<b></b>	$\cdot \Box$
Securities, or other financial account in a foreign country?  See the instructions for exceptions and filing requirements for FinCEN Form 114. It "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.  1 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?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)  a disqualified person?  (3) Furnish podds, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (5) Transfer any income or assets to a disqualified person (or make any of either available to the benefit or use of a disqualified person (or make any of either available to the benefit or use of a disqualified person?  (6) Agree to pay money or property to a government official? (Exception, Check "No"  (7) If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53-48(1(4)-3 or in a currient notice regarding disaster assistance check here  0 bit 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 might of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning might of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning might of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax planting disaster assistance check here  1 bit "Yes" list the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part X		and enter the amount of tax-exempt interest received or accrued during the year	N		
See the instructions for exceptions and filting requirements for FinCEN Form 114. If "Yes," enter the name of the topicing 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.  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?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (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)?  (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.)  b If any answer is "Yes" to 14(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 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 Deginning in 2015?  2 Taxes on failure to distribute income (section 4942(a)(2) for years the foundation was a private operating foundation defined in section 4942(a)(3) or 4942(b)(3) or 4942(b)(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(5) beginning before 2015?  If "Yes," list the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer 'No' and attach statement - see mistructions).  c If the provisions of section 49	16	At any time during calendar year 2015, did the foundation have an interest in or a signature or other authority over a bank,		Yes	
Part VII-B   Statements Regarding Activities for Which Form 4720 May Be Required			16		X
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.  1 a 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?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or fremburse the expenses of, a disqualified person?  (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)?  (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.)  b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exception discential and the foundation agreed in a prior year in any of the acts fail to qualify under the exception discential and the foundation selven on a failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(0)(3) or 4942(0)(5)):  a At the end of tax year 2015, did 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.)  b If "Yes," did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)  c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.  3 Did the foundation hold more than a		See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the			
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.    1a During the year did the foundation (either directly or indirectly):	_	foreign country			
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?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (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)?  (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.)  b If any answers "Yes" to 18(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section \$3.4941(a)-3 or in a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(a)(3) or 4942(b)(3) or 4	Pa	<u> </u>	1	\ <u>/</u>	
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?  (2) Borrow money from, lend may lo, or otherwise extend credit to (or accept it from) a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (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)?  (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.)  b If any answer is "Yes" to fat(1)-(6), did any of the acts fall 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 (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  At the end of tax year beginning in 2015?  1 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(a) or 4942(n)(3) o				Yes	NO
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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)? (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.)  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 53.491(t)-3 or in a current notice regarding disaster assistance (see instructions)?  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?  2 Taxes on faultive 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?  If Yes, Itst the years \[ Yes \] \[ X \] No  b If Yes, first the years \[ Yes \] \[ X \] No  b If Yes, first the years \[ Yes \] \[ X \] No  b If Yes, first the years \[ Yes \] \[ X \] No  b If Yes, first the years \[ Yes \] \[ X \] No  b If Yes, first the years \[ Yes \] \[ X \] No  b If Yes, first the years \[ Yes \] \[ X \] No  b If Yes, first the years \[ Yes \] \[ X \] No  b If Yes, first the years \[ Yes \] \[ X \] No  b If Yes, first the years \[ Yes \] \[ X \] No  b If Yes, first the years \[ Yes \] \[ X \] No  b If Yes, first the years \[ Yes \] \[ X \] No  b If Yes, first the years \[ Yes \] \[ X \] No  b If Yes, first the years \[	18				
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had not been removed from jeopardy before the first day of the tax year beginning in 2015?			48		X.
			44		v
				)-PF	

Part VII-B   Statements Regarding Activities for Which		Required (contin	56-22300	J54_	Page 6
5a During the year did the foundation pay or incur any amount to:	Tom 4720 may be	required (contin	T T		
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	nn 4945(e))?		es X No	J.	J
(2) Influence the outcome of any specific public election (see section 4955);	• **		50 (22) 110		
any voter registration drive?	or to carry or, amount or man	· · ·	es X No		
(3) Provide a grant to an individual for travel, study, or other similar purpose	s?		es X No	1	
(4) Provide a grant to an organization other than a charitable, etc., organization					
4945(d)(4)(A)? (see instructions)			es X No		
(5) Provide for any purpose other than religious, charitable, scientific, literary	, or educational purposes, or			- 1	
the prevention of cruelty to children or animals?			es X No	}	
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify ur	nder the exceptions described			İ	
section 53.4945 or in a current notice regarding disaster assistance (see instr	uctions)?	-	N/A	5b	İ
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 mainta	ained			
expenditure responsibility for the grant?	1	N/A 🔲 Ye	es 🔲 No		-
If "Yes," attach the statement required by Regulations section 53.494	15-5(d).				
6a Did the foundation, during the year, receive any funds, directly or indirectly, to	pay premiums on				}
a personal benefit contract?		Ye	es X No		
<b>b</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?	Ye	es 🗶 No 📙		
b If "Yes," did the foundation receive any proceeds or have any net income attrib		<del></del>	N/A	7b	
Part VIII Information About Officers, Directors, Trus	tees, Foundation Ma	anagers, Highly	y		
Paid Employees, and Contractors					
1 List all officers, directors, trustees, foundation managers and their	·	(c) Compensation	(d) Contributions to	(-) (	Evanas
(a) Name and address	(b) Title, and average hours per week devoted to position	(If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	accou allo	Expense unt, other wances
GROVER F. SHUGART, JR.	DIRECTOR				
4004 LONG MEADOW LANE					
WINSTONSALEM, NC 27106	4.00	0.	0.	<u>. </u>	0.
KAY W. SHUGART	DIRECTOR	1			
4004 LONG MEADOW LANE					
WINSTONSALEM, NC 27106	4.00	0.	0.	<u> </u>	<u> </u>
	4				
	4				
				<del> </del> _	
	4		1		
	4				
2 Compensation of five highest-paid employees (other than those in	cluded on line 1). If none	enter "NONE."	J		
	(b) Title, and average	,	(d) Contributions to	(e)	Expense
(a) Name and address of each employee paid more than \$50,000	hours per week devoted to position	(c) Compensation	employee benefit plans and deferred compensation	accou	Expense unt, other wances
NONE	devoted to position	<del> </del>	compensation	- 2110	manicos
HOME	†				
	<del> </del>			†	
	-				
	†			<del>                                     </del>	
	7		}	1	
	7				
	<u> </u>			<u>L</u>	
Total number of other employees paid over \$50,000			<b>•</b>		0

Part VIII Information About Officers, Directors, Trustees, Foundation		2230054 Page 7
Paid Employees, and Contractors (continued)		
3 Five highest-paid independent contractors for professional services. If none, enter "NC		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
		<del></del>
	<del></del>	
Total number of others receiving over \$50,000 for professional services		▶ 0
Part IX-A Summary of Direct Charitable Activities		<u> </u>
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical in number of organizations and other beneficiaries served, conferences convened, research papers produced	nformation such as the , etc.	Expenses
1 N/A		
2		
3		
<u></u>		
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		
2	-	
All other program-related investments. See instructions.		
3		
	•	
Total. Add lines 1 through 3		0.

0 . Form **990-PF** (2015)

P.	Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations	ndations, s	ee instructions )
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
а	Average monthly fair market value of securities	1a	307,012.
	Average of monthly cash balances	1b	307,012. 84,632.
	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	391,644.
	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation)		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	391,644.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	5,875.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	385,769.
6	Minimum investment return, Enter 5% of line 5	6	19,288.
	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations are	nd certain	
	foreign organizations check here 🕨 🔲 and do not complete this part.)		
1	Minimum investment return from Part X, line 6	1	19,288.
2a	Tax on investment income for 2015 from Part VI, line 5		
b	Income tax for 2015. (This does not include the tax from Part VI.)		
C	Add lines 2a and 2b	2c	462.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	18, <u>826.</u>
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	18,826.
6	Deduction from distributable amount (see instructions)	6	<u> </u>
7_	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	18,826.
_	Qualifying Distributions (see instructions)	I	
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:  Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1a	141,009.
a	Program-related investments - total from Part IX-B	1b	0.
b	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
2	Amounts set aside for specific charitable projects that satisfy the:		
3	Suitability test (prior IRS approval required)	3a	
a	Cash distribution test (attach the required schedule)	3b	
	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	141,009.
4	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment		
5	income. Enter 1% of Part I, line 27b	5	462.
e	Adjusted qualifying distributions. Subtract line 5 from line 4	6	140,547.
6	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation	qualifies for	
	4940(e) reduction of tax in those years.		

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2014	(c) 2014	( <b>d)</b> 2015
1 Distributable amount for 2015 from Part XI,				
line 7				18,826.
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 278,415.				
b From 2011 230, 925.				
c From 2012 154,952.				
d From 2013 137,358.				
e From 2014 121,843.				
f Total of lines 3a through e	923,493.			
4 Qualifying distributions for 2015 from				
Part XII, line 4: ►\$ 141,009.				
a Applied to 2014, but not more than line 2a		<u> </u>	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 <u>.</u>			·
d Applied to 2015 distributable amount				18,826.
e Remaining amount distributed out of corpus	122,183.			
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	1,045,676.			
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	0.00 44.5			
not applied on line 5 or line 7	<u>278,415.</u>			
9 Excess distributions carryover to 2016.	B 6 B 6 C 4			
Subtract lines 7 and 8 from line 6a	767,261.			
10 Analysis of line 9:				
a Excess from 2011 230, 925.				
b Excess from 2012 154,952.				
c Excess from 2013 137,358.				
d Excess from 2014 e Excess from 2015 122,183.				
e Excess from 2015 122, 183.	<del></del>	ļ	L	Form <b>990-PF</b> (2015)

Part XI	/ Private Operating Fo	pungations (see ins	structions and Part VII-	A, question 9)	<u>N/A</u>	
	oundation has received a ruling or					
	ition, and the ruling is effective for			<b>▶</b>	<del></del>	<del></del>
	box to indicate whether the found		g foundation described in		4942(J)(3) or 49	42(j)(5)
2 a Enter t	he lesser of the adjusted net	Tax year	(1) 0044 T	Prior 3 years	(1) 0040	/ · <del>-</del> · ·
incom	e from Part I or the minimum	(a) 2015	(b) 2014	(c) 2013	(d) 2012	(e) Total
investi	ment return from Part X for				}	
each y	ear listed				<u> </u>	
<b>b</b> 85% o	f line 2a				<b></b>	
c Qualify	ring distributions from Part XII,					
line 4 t	for each year listed					
d Amou	nts included in line 2c not					
used o	lirectly for active conduct of					
exemp	ot activities					
e Qualify	ring distributions made directly					
for act	ive conduct of exempt activities.					
3 Comp alterna a "Asset	act line 2d from line 2c lete 3a, b, or c for the ative test relied upon: s" alternative test - enter: alue of all assets					
	alue of assets qualifying nder section 4942(j)(3)(B)(i)					
2/3 of	wment" alternative test - enter minimum investment return n in Part X, line 6 for each year					
c "Supp	ort" alternative test - enter:					
ir d s	otal support other than gross ivestment income (interest, ividends, rents, payments on ecurities loans (section 12(a)(5)), or royalties)					
`´a o	upport from general public nd 5 or more exempt rganizations as provided in ection 4942(j)(3)(B)(iii)					
(3) L	argest amount of support from					
a	n exempt organization			<u>.</u>	ļ	
	ross investment income				1 127 000	
Part X\	/ Supplementary Info	rmation (Comple	ete this part only i	if the foundation	n had \$5,000 or m	ore in assets
	at any time during t	ne year-see insti	ructions.)			
	mation Regarding Foundatio					
year (	ny managers of the foundation who but only if they have contributed m	nore than \$5,000). (See s	than 2% of the total contrection 507(d)(2).)	riputions received by the	e roundation before the clo	se or any tax
GROVE	R F. SHUGART, J	R.				
other	ny managers of the foundation whe entity) of which the foundation has	o own 10% or more of th s a 10% or greater intere:	ie stock of a corporation ( st.	or an equally large porti	ion of the ownership of a p	armersnip or
NONE	<del></del>					
Check	mation Regarding Contribution of the makes gifts, grants, etc.	nly makes contributions	to preselected charitable	organizations and does	not accept unsolicited requ complete items 2a, b, c, and	uests for funds. If d d.
a The n	ame, address, and telephone num	ber or e-mail address of	the person to whom apple	cations should be addre	essed:	
b The fo	orm in which applications should b	e submitted and informa	tion and materials they sh	nould include:		
	ubmission deadlines:					
d Anv r	estrictions or limitations on award	s, such as by geographic	al areas, charitable fields,	kınds of institutions, or	other factors:	
N/A	seasons of minianons on arraise	-,, g, -g, -p, -np, -nv	,	,		
						- 000 DE

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Page 11

Supplementary Information (continued) Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, Recipient Purpose of grant or contribution Foundation show any relationship to status of recipient **Amount** any foundation manager Name and address (home or business) or substantial contributor a Paid during the year 20/20/20 250. AFAC 50. ALS ASSOC. 500. ALZHEIMERS ASSOC 500, AMERICAN BIBLE SOCIETY SEE CONTINUATION SHEET(S) **▶** 3a 138 035. Total **b** Approved for future payment NONE **▶** 3b Total

Form 990-PF (2015)

523621 11-24-15

#### Part XVI-A **Analysis of Income-Producing Activities**

nter gross amounts unless otherwise indicated.	T T	Dusiness income	Excluded I	by section 512, 513, or 514	(e)
1 Program service revenue:	(a) Business code	(b) Amount	(C) Exclu- sion code	(d) Amount	Related or exempt function income
a	_				
b	_				
c			+ +		
d	_				
e	_		<del></del>		<del></del>
f	_				<del></del>
g Fees and contracts from government agencies					
Membership dues and assessments			_		
Interest on savings and temporary cash				204	
investments			14	391.	
Dividends and interest from securities			14	9,141.	
Net rental income or (loss) from real estate:	-			<del></del>	
a Debt-financed property					
Not debt-financed property	-				
Net rental income or (loss) from personal					
property	-			7 202	<del> </del>
Other investment income			31	7,323.	
Gain or (loss) from sales of assets other			1.0	24 255	
than inventory		<del></del>	18	34,277.	
Net income or (loss) from special events			<del></del>		
Gross profit or (loss) from sales of inventory					
Other revenue:					
ā		· · · · · · · · · · · · · · · · · · ·	+		
b	I I		+ +		
C					
d	- <del>  -  </del>		+ +-		
Subtotal. Add columns (b), (d), and (e)	— <del>   </del>	0	+ +	51,132.	
Total. Add line 12, columns (b), (d), and (e)	<u> </u>		.•1		51,13
ne No. Explain below how each activity for which in the foundation's exempt purposes (other the	ncome is reported in	ı column (e) of Part XVI-			olishment of
the foundation's exempt purposes (other th	ian by providing fun	us for such purposes).			
	-				
				-	

Form 990-PF (2015) SHUGART FAMILY FOUNDATION 56-2230054 Page 13 Information Regarding Transfers To and Transactions and Relationships With Noncharitable **Exempt Organizations** Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of Yes No 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) (2) Other assets X 1a(2) **b** Other transactions: (1) Sales of assets to a noncharitable exempt organization Х 1b(1) X (2) Purchases of assets from a noncharitable exempt organization 1b(2) (3) Rental of facilities, equipment, or other assets 1b(3) (4) Reimbursement arrangements 1b(4) Х 1b(5) X (5) Loans or loan guarantees (6) Performance of services or membership or fundraising solicitations X 1b(6) X Sharing of facilities, equipment, mailing lists, other assets, or paid employees 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

colum	n (d) the value of the goods,	other assets, or services received.					
(a) Line no	(b) Amount involved	(c) Name of noncharitable	e exempt organization	(d) Description of transfers, transactions, and sharing arrangements			
		N/A					
	<del></del>						
					<del></del>		
			· · · · · · · · · · · · · · · · · · ·				
			- <del></del>				
	-				<del></del>		
					<del></del>		
				<del></del>			
		<del></del>			······		
		<del></del>					
ın sec	tion 501(c) of the Code (othe s," complete the following sch		tion 527?		Yes X No		
	(a) Name of or	ganization	(b) Type of organization	(c) Description of r	<u>elationship</u>		
	N/A						
				·····			
Sign <sup>8</sup>	Inder penalties of bettery, I declare nd belief, it is true, obrrect, and co	omplete Deplaration of preparer (other the	ng accompanying schedules and s an taxpayer) is based on all informa 7-12-16  Date	statements, and to the best of my knowledge ation of which preparer has any knowledge Title	May the IRS discuss this return with the preparer shown below (see instr )?  X Yes No		
	Print/Type preparer's n	arme Preparer's s	signature	Date Check if	PTIN		
			•	self- employed	1		
Paid	GEORGE H.	KNOSTMAN 91	H. Knot-50	7-11-16	P00235890		
Prepar	er Firm's name > SHA	ARRARD MCGEE & C	COMPANY, P.A.	Firm's EIN ► 5	6-1146197		
Use Or					· · · · · · · · · · · · · · · · · · ·		
	Firm's address ▶ PC	BOX 10439					
	d CE	PERMICRORO NC 27	7 <i>A</i> O <i>A</i>	Phone no 33	6-272-9777		

### Schedule B (Form 990, 990-EZ, or 990-PF)

Department of the Treasury Internal Revenue Service

Name of the organization

### **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.lrs.gov/form990.

OMB No 1545-0047

2015

**Employer identification number** 

S	HUGART FAMILY FOUNDATION	56-2230054
Organization type (check	one)	
Filers of:	Section:	
Form 990 or 990-EZ	501(c)( ) (enter number) organization	
	4947(a)(1) nonexempt charitable trust <b>not</b> treated as a private foundation	
	527 political organization	
Form 990-PF	X 501(c)(3) exempt private foundation	
	4947(a)(1) nonexempt charitable trust treated as a private foundation	
	501(c)(3) taxable private foundation	
Note. Only a section 501(	n is covered by the <b>General Rule</b> or a <b>Special Rule.</b> c)(7), (8), or (10) organization can check boxes for both the General Rule and a Spe	cial Rule. See instructions.
General Rule		
	ion filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions t ny one contributor. Complete Parts I and II. See instructions for determining a contr	
Special Rules		
sections 509(a)(1 any one contribu	ion described in section 501(c)(3) filing Form 990 or 990·EZ that met the 33 1/3% su 1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990·EZ), Part II, line 13 utor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the EZ, line 1. Complete Parts I and II.	3, 16a, or 16b, and that received from
year, total contrib	ion described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received butions of more than \$1,000 <i>exclusively</i> for religious, charitable, scientific, literary, of cruelty to children or animals. Complete Parts I, II, and III.	
year, contributior is checked, enter purpose Do not	ion described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received ins exclusively for religious, charitable, etc., purposes, but no such contributions total refer the total contributions that were received during the year for an exclusively recomplete any of the parts unless the <b>General Rule</b> applies to this organization becomes, contributions totaling \$5,000 or more during the year	aled more than \$1,000. If this box eligious, charitable, etc ,
but it must answer "No" o	a that is not covered by the General Rule and/or the Special Rules does not file Schoon Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or o set 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

### SHUGART FAMILY FOUNDATION

56-2230054

Part I	Contributors (see instructions). Use duplicate copies of Part I if a	additional space is needed.	
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	SHUGART MANAGEMENT, INC  221 JONESTOWN ROAD  WINSTON SALEM, NC 27104	\$\$\$\$	Person X Payroll
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash Complete Part II for noncash contributions.)

Name of organization

Employer identification number

## SHUGART FAMILY FOUNDATION

56-2230054

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

	Schedule B	(Form 990,	990-EZ,	or 990-PF)	(2015
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Page 4

lame of organ	ization			Employer identification number
SHUGART Part III	FAMILY FOUNDATION  Exclusively religious, charitable, etc., contri the year from any one contributor. Complete co	butions to organizations described	lin section	56-2230054 n 501(c)(7), (8), or (10) that total more than \$1,000 for
	completing Part III, enter the total of exclusively religious,	charitable, etc., contributions of \$1,000 o	r less for the	year (Enter this info once) \$
(a) No.	Use duplicate copies of Part III if additiona	I space is needed.	- 1	<del></del>
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift		(d) Description of how gift is held
-				
-		(e) Transfer of git	l ft	
	Transferee's name, address, an	<u>d ZIP + 4</u>	Re	lationship of transferor to transferee
_				
1 -				
(a) No. from				
from Part I	(b) Purpose of gift	(c) Use of gift	_	(d) Description of how gift is held
_				
———   –				
		(e) Transfer of gi	ft	
	Transferee's name, address, an	d ZIP + 4	Re	lationship of transferor to transferee
_				
_				
-				
(a) No. from	(b) Purpose of gift	(c) Use of gift		(d) Description of how gift is held
Part I	(b) Fulpose of gift	(0) 000 01 9.11		(0,000)
-				
<u> </u>		/-> T		
		(e) Transfer of gi	it	
	Transferee's name, address, an	d ZIP + 4	Re	elationship of transferor to transferee
-				
-				
(a) No. from	(b) Purpose of gift	(c) Use of gift		(d) Description of how gift is held
Part I				
_				
		(e) Transfer of gi	l	
		(0, 000,000,000,000		
<u> </u>	Transferee's name, address, an	d ZIP + 4	Re	elationship of transferor to transferee
-			<del> </del>	
-				
-			_	

SHUGART FAMILY FO	OUNDATION		3005	4 P	AGE 1	<u> </u>
	ses for Tax on Investment Income					
. (a) List and 2-story bri	describe the kind(s) of property sold ick warehouse; or common stock, 20	, e.g., real estate, 0 shs. MLC Co.	l'	) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a RUCKUS WIRELES	S INC.				02/02/15	10/29/16
b PFIZER INC.						04/06/16
c WINDSTREAM HOLI	DINGS INC.					05/07/15
d COMMUNICATIONS						05/19/15
e WINDSTREAM HOLI						05/19/15
1 PIEDMONT NATUR						10/26/15
g					<u> </u>	= 07 = 07 = 0
h						
1						
1						
k						
1						
m						
n						
0						
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale			Gain or (loss) lus (f) minus (g)	
a 22,083.		18,925.		·		3,158.
b 32,224.		26,533.				5,691.
c 4.		3.				1.
d 10,665.		10,586.				79.
e 2,779.		3,398.		·.		<619.
f 57,953.		31,986.				25,967.
g						
h						
1		-				
k						
1						
m			<u> </u>			
n						
0						
	g gain in column (h) and owned by t			(I) Los	ses (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		Gains (excess o	f col. (h) gain ove ot less than "-0-")	r col. (k),
a						3,158.
b				<del> </del>		5,691.
С					<u></u>	<u> </u>
d		<u> </u>				79.
e			ļ			<619.
f						<u>25,967.</u>
g			<b>_</b>			
h			<u> </u>		···	
1						
<u> </u>					<del></del> .	
<u>k</u>			<del> </del>		<del></del>	<del></del>
<u> </u>						
<u>m</u>			<del> </del> -	_ <del></del>		
<u>n</u>			<del> </del>			<del></del>
0	<u> </u>		<del>                                     </del>			
2 Capital gain net income or (net ca	pital loss) { If gain, also enter If (loss), enter "-0	in Part I, line 7 -" in Part I, line 7	2			34,277.
3 Net short-term capital gain or (los	ss) as defined in sections 1222(5) and	d (6):				
If gain, also enter in Part I, line 8,	column (c).	ľ			N/A_	
If (loss), enter "-0-" in Part I, line 8	·		3		N/A	

Part XV Supplementary Information Grants and Contributions Paid During the Year (Continuation) If recipient is an individual, Recipient Purpose of grant or contribution show any relationship to any foundation manager or substantial contributor Foundation Amount status of Name and address (home or business) recipient AMERICAN CANCER SOCIETY 750, AMERICAN DIABETES ASSOC <u>750,</u> AMERICAN FEDERATION OF POLICE 130. AMERICAN HEART ASSOC. 750. AMERICAN INST FOR CANCER RESEARCH 350. AMERICAN LEPROSY MISSIONS 950. ANGEL TREE 250, ARMED FORCES AID CAMP 30, ASSOC. IN CHRISTIAN COUNSELING 250, BAPTIST MIDMISSIONS 650, 136 385. Total from continuation sheets

Part XV | Supplementary Information Grants and Contributions Paid During the Year (Continuation) If recipient is an individual, show any relationship to any foundation manager or substantial contributor Recipient Purpose of grant or contribution Foundation Amount status of Name and address (home or business) recipient BARIUM SPRINGS HOME FOR CHILDREN 1,000. BELIEVER'S BAPTIST CHURCH 6,500, BIBLE LEAGUE INTERNATIONAL <u>150,</u> BILLY GRAHAM EVANGELISTIC ASSOC. 1,500, BOYS TOWN 750, BURN RESCUE 1,000, CAMPUS CRUSADE FOR CHRIST 2,400. CARE 750, CEF 250, CENTER FOR AMERICA'S FUTURE 200, Total from continuation sheets

Part XV | Supplementary Information Grants and Contributions Paid During the Year (Continuation) If recipient is an individual, show any relationship to any foundation manager or substantial contributor Recipient Foundation Purpose of grant or Amount status of contribution Name and address (home or business) recipient CHARLES & JENNY BRETT 500. CHILDREN CENTER FOR PHYSICALLY 1,000. DISABLED CHILDREN INTERNATIONAL 1,000, CHRISTIAN APPALACHIAN PROJECT 1,100. CLEMMONS FOOD PANTRY 2,000. COMMUNITY CARE CENTER 250. CONGRESSIONAL PRAYER CAUCUS 800. COVENANT HOUSE 750. CRISIS CONTROL MINISTRY - WS 3,500. CRISIS MINISTRY OF DAVIDSON CO 750, Total from continuation sheets

Part XV Supplementary Information

Grants and Contributions Paid During the Year (Continuation) If recipient is an individual, show any relationship to any foundation manager or substantial contributor Recipient Foundation Purpose of grant or status of contribution Amount Name and address (home or business) recipient CRU 850. CYSTIC PIBROSIS FOUNDATION 850, DAVIDSON CO DEPT SENIOR SERVICES 1,500. DAVIE PREGANCY CARE CENTER 1,500, DISABLED AMERICAN VETERANS 800. DOCTORS WITHOUT BORDERS 3,000, DREAM ALIGN MINISTRY 500, DSNGG 250, EASTER SEALS 250. EMMANUEL BAPTIST CHURCH 1,000. Total from continuation sheets

SHUGART FAMILY FOUNDATION

Part XV | Supplementary Information

3 Grants and Contributions Paid During the 1		<del></del> -		
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	or substantial contributor	recipient		
MMANUEL COLLEGE				
				750
AITH BAPTIST CHURCH				
				6,000
PEED BY SEED		10000		1,500
FEED THE CHILDREN			<del></del>	1,500
FIRST PENTECOSTAL HOLINESS CHURCH				
	-			2,000
FIRSTSTEP				750
				750
FOOD FOR THE POOR INC				500
FOR YOU CHRIST MINISTRIES				
				250
FORSYTH FRIENDS MEETING				95.0
				250
FORSYTH JAIL & PRISON MINISTRY				1,000
Total from continuation sheets				

Part XV Supplementary Informatio	' FAMILY FOUNDAT] n			30054
3 Grants and Contributions Paid During the				
Recipient	If recipient is an individual,	Foundation	Purpose of grant or contribution	Amount
Name and address (home or business)	any foundation manager or substantial contributor	status of recipient	Contribution	7,11100.11
REEDOM BAPTIST CHURCH			<u> </u>	50
PRIENDS OF ISRAEL				85
UNDAMENTAL BAPT HOME MISS				50
GOD'S WORD TO THE NATIONS MISSION	,			
SOCIETY				25
GREENSBORO URBAN MINISTRIES				1,00
HANES BAPTIST CHURCH				5(
HEBRON COLONY MINISTRIES				
				1,00
HELP 4 KIDS				5
HELP HOSPITALIZED VETERANS				
HIS LABORING FEW MINISTRIES				1,5

Part XV Supplementary Information Grants and Contributions Paid During the Year (Continuation) Recipient If recipient is an individual, Purpose of grant or contribution show any relationship to any foundation manager or substantial contributor Foundation status of Amount Name and address (home or business) recipient HOSPICE & PALLITIVE CENTER 750. INTERNATIONAL FELLOWSHP 750, CHRISTIANS&JEWS JDRF WALK TO CURE DIABETES 250. KENNETH CATES MISSIONARY COMMITTEE 500, KIWANIS CLUB 250. LAMB FOUNDATION OF NORTH CAROLINA, 500. INC. LEUKEMIA & LYMPHOMA SOCIETY 350, LIBERTY BAPTIST CHURCH 3,000. LIBERTY COUNSEL 1,000, MARCH OF DIMES 1,050. Total from continuation sheets

Part XV Supplementary Information Grants and Contributions Paid During the Year (Continuation) If recipient is an individual, show any relationship to any foundation manager or substantial contributor Recipient Foundation Purpose of grant or status of contribution Amount Name and address (home or business) recipient MDA 300, MEADOWVIEW BAPTIST CHURCH 6,500, MEMORIAL SLOAN KETTERING CANCER CENTER 750. MENTAL HEALTH OF WINSTON SALEM 750, MERCY CORPS 1,750. MERCY HOMES FOR BOYS AND GIRLS 400. MERCY SHIPS 1,750, MOVEMENT CHURCH 1,000. MUSCULAR DYSTROPHY ASSOCIATION 250, NATIONAL ASSOCATION OF BLIND VETERANS 300, Total from continuation sheets

Part XV Supplementary Information		<del></del>		
3 Grants and Contributions Paid During the Y				<u> </u>
Recipient	If recipient is an individual, show any relationship to any foundation manager	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	or substantial contributor	recipient		
NATIONAL LAW ENFORCEMENT				200
NATIONAL MULTIPLE SCLEROSIS SOCIETY				
				750
NEW HOPE RANCH				500
DAK RIDGE TOWN PARK				400
ON WINGS LIKE A DOVE				5,000
PAUL HUFF				500
PENTECOSTAL HOLINESS CHURCH				1,000
PIEDMONT INTERNATIONAL UNIVERSITY				750
PINEY GROVE BAPTIST CHURCH				750
PRAY IN JESUS' NAME MINISTRIES				1,000
Total from continuation sheets	-			

Part XV | Supplementary Information Grants and Contributions Paid During the Year (Continuation) If recipient is an individual, show any relationship to any foundation manager or substantial contributor Recipient Foundation Purpose of grant or **Amount** status of contribution Name and address (home or business) recipient PRISON FELLOWSHIP MINISTIRES 500, ROCK OF AGES MINISTRIES 500. ROOM AT THE INN OF THE TRIAD 1,250, RUN MINISTRIES 1,000, SAMARITAN MINISTRIES 2,000. SAVE JERUSALEM 600, SECOND HARVEST FOOD BANK 2,500, SEDGEFIELD PRESBYTERIAN CHURCH 750, SENIOR SERVICES MEALS ON WHEELS 2,000, SERVING GODS SERVANTS 2,000. Total from continuation sheets

Part XV Supplementary Information	FAMILY FOUNDAT:			30054 *
3 Grants and Contributions Paid During the Y				
Recipient	If recipient is an individual, show any relationship to			
Name and address (home or business)	show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
	or substantial contributor	, co, plant		
SOLUS CHRISTUS, INC.				250
SPECIAL OLYMPICS				1,000
ST JUDE CHILDREN HOSPITAL				
				1,000
SUSAN G KOMEN				750
FARGET ISRAEL				250
THE FOUNDATION OF FORSYTH TECH				50
THE GIDEONS INTERNATIONAL				
				250
THE LEUKEMIA & LYMPHOMA SOCIETY				350
THE SALVATION ARMY				3,000
THE SHEPHERD CENTER OF KERNERSVILLE				1,50

Part XV Supplementary Information Grants and Contributions Paid During the Year (Continuation) If recipient is an individual, show any relationship to any foundation manager or substantial contributor Recipient Purpose of grant or contribution Foundation status of Amount Name and address (home or business) recipient THE SMILE TRAIN 1,500, THE WORKSHOP OF DAVIDSON 500. TRINITY CENTER 750. TURNING POINT 1,000. UNICEF 150, US FUND FOR UNICEF 150. WARM BLANKETS ORPHAN CARE <u>INTERNATIONAL</u> 500, WARRIORS FOR WELLS 500. WESTERN TRIAD FCA 6,000. WHITE ROAD BAPTIST CHURCH 2,050. Total from continuation sheets

Part XV Supplementary Information Grants and Contributions Paid During the Year (Continuation) If recipient is an individual, show any relationship to any foundation manager or substantial contributor Recipient Purpose of grant or contribution Foundation Amount status of Name and address (home or business) recipient WINSTON-SALEM RESCUE MISSION 3,000. WOUNDED WARRIOR PROJECT 275, WS PROFESSIONAL FIRE FIGHTERS **ASSOCIATION** 500, WS STREET SCHOOL 100, WYCLIFFE BIBLE TRANSLATORS 1,000, Total from continuation sheets

FORM 990-PF INTERE	ST ON SAVING	S AND T	EMPOR	ARY	CASH	IN	VESTMENTS	Si	<b>PATEMENT</b>	1
SOURCE		RE	(A) VENUE BOOK		NET	IN	(B) VESTMENT COME	ı	(C) ADJUSTED NET INCOM	E
INTEREST				4.			4.			
INTEREST FROM ENERGY PARTNERS, L.P. K-1			3	51.			351.			
INTEREST FROM LINN : K-1	ENERGY LLC			36.			36.			
TOTAL TO PART I, LI	NE 3		3	91.			391.			
FORM 990-PF	DIVIDENDS	AND INT	EREST	FRO	M SE	CUR	ITIES	si	FATEMENT	2
SOURCE	GROSS AMOUNT	CAPIT GAIN DIVIDE	S		(A) VENU		(B) NET INVES MENT INCO		(C) ADJUST NET INC	
DIVIDENDS DIVIDENDS FROM ENERGY TRANSFER	8,862.		0.		8,8	62.	8,86	2.		
PARTERS, L.P. K-1	279.		0.		2	79.	27	9.		
TO PART I, LINE 4	9,141.		0.	·	9,1	41.	9,14	1.		
FORM 990-PF		OTHER	INCO	ME		·		S	PATEMENT	3
DESCRIPTION					JE OKS		(B) ET INVEST- ENT INCOME			
ROYALTIES ORDINARY LOSS SECTION 1231 LOSS OTHER INVESTEMENT I	NCOME	•			2 3,827 <619 .,767	.> .>		.>		
TOTAL TO FORM 990-P	F, PART I, L	INE 11	<del></del> -	7	7,323	•	7,323	3.		

FORM 990-PF	ACCOUNTI	NG FEES	·	STATEMENT 4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
SHARRARD MCGEE & CO	3,500.	1,750.		1,750.
TO FORM 990-PF, PG 1, LN 16B	3,500.	1,750.		1,750.
FORM 990-PF	TAX	ES		STATEMENT 5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAX TAXES	17. 1,154.	17. 0.		0. 0.
TO FORM 990-PF, PG 1, LN 18	1,171.	17.		0.
FORM 990-PF	OTHER E	XPENSES		STATEMENT 6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE
DESCRIPTION  ADVISORY FEES OTHER EXPENSES	EXPENSES	NET INVEST-	ADJUSTED	(D) CHARITABLE
ADVISORY FEES	PER BOOKS  1,838.	NET INVEST- MENT INCOME 1,838. 1,326.	ADJUSTED	(D) CHARITABLE PURPOSES 0.
ADVISORY FEES OTHER EXPENSES	PER BOOKS  1,838. 2,198.	NET INVEST- MENT INCOME 1,838. 1,326. 3,164.	ADJUSTED	(D) CHARITABLE PURPOSES  0. 872.
ADVISORY FEES OTHER EXPENSES TO FORM 990-PF, PG 1, LN 23	EXPENSES PER BOOKS 1,838. 2,198. 4,036.	NET INVEST- MENT INCOME  1,838. 1,326. 3,164. E STOCK	ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES  0. 872.
ADVISORY FEES OTHER EXPENSES TO FORM 990-PF, PG 1, LN 23 FORM 990-PF	EXPENSES PER BOOKS 1,838. 2,198. 4,036.	NET INVEST- MENT INCOME  1,838. 1,326. 3,164. E STOCK	ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES  0. 872.  872.  STATEMENT 7  FAIR MARKET