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Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

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▶ Information about Form 990-PF and its instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2015
Open to Public Inspection

For calendar year 2015, or tax year beginning 06-01-2015, and ending 05-31-2016

Name of foundation JOHN T STEVENS FOUNDATION		A Employer identification number 57-6005554	
Number and street (or P O box number if mail is not delivered to street address) POST OFFICE BOX 158		Room/suite	B Telephone number (see instructions) (803) 475-3655
City or town, state or province, country, and ZIP or foreign postal code KERSHAW, SC 29067			
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ 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) ▶ \$ 7,238,394		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here	
J Accounting method ☐ Cash ☒ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</i>		Revenue and expenses per books (a)	Net investment income (b)	Adjusted net income (c)	Disbursements for charitable purposes (d) (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	2,952	2,952		
	4 Dividends and interest from securities	261,153	261,153		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	226,541			
	b Gross sales price for all assets on line 6a 321,816				
	7 Capital gain net income (from Part IV, line 2) . . .		226,541		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	490,646	490,646		
	13 Compensation of officers, directors, trustees, etc	33,000	0		0
	14 Other employee salaries and wages	25,200	0		0
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule).				
	b Accounting fees (attach schedule).	8,490	0		0
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .				
	19 Depreciation (attach schedule) and depletion . .	825	0		
	20 Occupancy				
	21 Travel, conferences, and meetings.				
	22 Printing and publications				
	23 Other expenses (attach schedule).	9,416	0		0
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	76,931	0		0
	25 Contributions, gifts, grants paid	277,863			277,863
	26 Total expenses and disbursements. Add lines 24 and 25	354,794	0		277,863
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	135,852			
	b Net investment income (if negative, enter -0-)		490,646		
	c Adjusted net income (if negative, enter -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	21,343	34,828	34,828
	2	Savings and temporary cash investments	346,561	315,040	315,040
	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)	1,344,675	1,366,766	1,366,766
	b	Investments—corporate stock (attach schedule)	5,219,719	5,442,763	5,442,763
	c	Investments—corporate bonds (attach schedule)	14,196	60,878	60,878
	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 ▶ _____ 46,254 Less accumulated depreciation (attach schedule) ▶ _____ 28,135	18,944	18,119	18,119
15	Other assets (describe ▶ _____)				
16	Total assets(to be completed by all filers—see the instructions Also, see page 1, item I)	6,965,438	7,238,394	7,238,394	
Liabilities	17	Accounts payable and accrued expenses	316	3,013	
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule).			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities(add lines 17 through 22)	316	3,013	
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	6,965,122	7,235,381	
	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(see instructions)	6,965,122	7,235,381	
31	Total liabilities and net assets/fund balances(see instructions)	6,965,438	7,238,394		

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	6,965,122
2	Enter amount from Part I, line 27a	2	135,852
3	Other increases not included in line 2 (itemize) ▶ _____	3	143,902
4	Add lines 1, 2, and 3	4	7,244,876
5	Decreases not included in line 2 (itemize) ▶ _____	5	9,495
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	7,235,381

Part IV

Capital Gains and Losses for Tax on Investment Income

List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)		How acquired P—Purchase (b) D—Donation	Date acquired (c) (mo , day, yr)	Date sold (d) (mo , day, yr)
1a	See Additional Data Table			
b				
c				
d				
e				

(e) Gross sales price	Depreciation allowed (f) (or allowable)	Cost or other basis (g) plus expense of sale	Gain or (loss) (h) (e) plus (f) minus (g)
a See Additional Data Table			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			Gains (Col (h) gain minus col (k), but not less than -0-) or (l) Losses (from col (h))
(i) F M V as of 12/31/69	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
a See Additional Data Table			
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	226,541
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 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	328,124	6,973,099	0 047056
2013	320,735	6,655,860	0 048188
2012	342,124	5,296,893	0 064590
2011	339,481	6,154,977	0 055156
2010	350,508	5,808,920	0 060340

2	Total of line 1, column (d).	2	0 275330
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 055066
4	Enter the net value of noncharitable-use assets for 2015 from Part X, line 5.	4	6,805,452
5	Multiply line 4 by line 3.	5	374,749
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	4,906
7	Add lines 5 and 6.	7	379,655
8	Enter qualifying distributions from Part XII, line 4.	8	277,863

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 page 18 of the instructions)

1a

Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1
Date of ruling or determination letter _____
(attach copy of letter if necessary—see instructions)

b

Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b

c

All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)

2

Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)

2

0

3

Add lines 1 and 2.

3

9,813

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

9,813

6

Credits/Payments

a

2015 estimated tax payments and 2014 overpayment credited to 2015

6a

6,800

b

Exempt foreign organizations—tax withheld at source.

6b

c

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

6c

d

Backup withholding erroneously withheld.

6d

7

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

7

6,800

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

3,013

10

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

10

11

Enter the amount of line 10 to be **Credited to 2015 estimated tax** ☐ **Refunded** ☐

11

Part VII-A

Statements Regarding Activities

1a

During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?

1a

No

b

Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)?
If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.

1b

No

c

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

1c

No

d

Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:
(1) On the foundation ☐ \$ _____ 0 (2) On foundation managers ☐ \$ _____ 0

e

Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$ _____ 0

2

Has the foundation engaged in any activities that have not previously been reported to the IRS?
If "Yes," attach a detailed description of the activities.

2

No

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

No

4a

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

4a

No

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

No

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

No

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

Yes

8a

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

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

Yes

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

No

10

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

10

No

Part VII-A

Statements Regarding Activities *(continued)*

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		No
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		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A	13	Yes	
14	The books are in care of W JOEY MUNN Telephone no (803) 475-3655 Located at POST OFFICE BOX 158 KERSHAW SC ZIP+4 29067			
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			
16	At any time during calendar year 2015, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country 	16	Yes	No

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)? ☐ Organizations relying on a current notice regarding disaster assistance check here. ☐	1b		
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		No
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 20____, 20____, 20____, 20____			
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		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20____, 20____, 20____, 20____			
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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015.</i>) ☐	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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		No

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

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	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
See Additional Data Table				

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	Title, and average hours per week (b) devoted to position	(c) Compensation	Contributions to employee benefit plans and deferred compensation (d)	Expense account, (e) other allowances
NONE				

Total

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

0

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Part VIII

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
NONE		

Total number of others receiving over \$50,000 for professional services.	0
--	---

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1	
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	

[illegible]

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	6,794,865
b	Average of monthly cash balances.	1b	114,223
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	6,909,088
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	6,909,088
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	103,636
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	6,805,452
6	Minimum investment return. Enter 5% of line 5.	6	340,273

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	340,273
2a	Tax on investment income for 2015 from Part VI, line 5.	2a	9,813
b	Income tax for 2015 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	9,813
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	330,460
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	330,460
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	330,460

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	277,863
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	277,863
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	277,863

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				330,460
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only.			70,386	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2015				
a From 2010.				
b From 2011.				
c From 2012.				
d From 2013.				
e From 2014.				
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2015 from Part XII, line 4 ▶ \$ 277,863				
a Applied to 2014, but not more than line 2a			70,386	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2015 distributable amount.				207,477
e Remaining amount distributed out of corpus	0			
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	0			
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 instructions			0	
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015.				122,983
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2010 not applied on line 5 or line 7 (see instructions). . .	0			
9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a.	0			
10 Analysis of line 9				
a Excess from 2011.				
b Excess from 2012.				
c Excess from 2013.				
d Excess from 2014.				
e Excess from 2015.				

Part XIV

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 organization is a private operating foundation described in section 170(c)(2)(B)(i) or 170(c)(2)(B)(ii): ☐ 170(c)(2)(B)(i) or ☐ 170(c)(2)(B)(ii)

		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 organization 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))

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

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

JOHN T STEVENS FOUNDATION STEVE WIL
P O BOX 158
KERSHAW, SC 29067
(803) 475-3655

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

THE REQUEST MUST BE IN WRITING

c Any submission deadlines
NONE

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

KERSHAW AND LANCASTER COUNTY AREAS AND MUST QUALIFY AS A 501 (C) 3 ORGANIZATION

Part XV

Supplementary Information(continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	277,863
b Approved for future payment				
Total			3b	0

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			14	2,952	
4 Dividends and interest from securities.			14	261,153	
5 Net rental income or (loss) from real estate					
a Debt-financed property.					
b Not debt-financed property.					
6 Net rental income or (loss) from personal property					
7 Other investment income.					
8 Gain or (loss) from sales of assets other than inventory			18	226,541	
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).		0		490,646	0
13 Total. Add line 12, columns (b), (d), and (e).			13		490,646

(See worksheet in line 13 instructions to verify calculations)

[illegible]

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	Date acquired (c) (mo , day, yr)	(d) Date sold (mo , day, yr)
1,200 SHS SOUTHERN COMPANY	P	1999-02-25	2015-10-08
2,000 SHS PIEDMONT NATURAL GAS COMPANY	P	2003-09-16	2016-05-25
2,000 SHS PIEDMONT NATURAL GAS COMPANY	P	2004-04-26	2016-05-25
500 SHS PIEDMONT NATURAL GAS COMPANY	P	2004-12-09	2016-05-25
150,000 SHS FHLMC	P	2005-01-04	2015-09-15
LOOMIS SAYLES STRATEGIC	P	2015-12-21	2015-12-21

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
53,530		18,636	34,894
119,105		40,358	78,747
119,105		41,161	77,944
29,776		11,685	18,091
300		300	0
			16,865

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			34,894
			78,747
			77,944
			18,091
			0
			16,865

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation(If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
STEVE G WILLIAMS JR	PRESIDENT 1 00	0	0	0
POST OFFICE BOX 158 KERSHAW, SC 29067				
JASON MUNN	SECRETARY 1 00	0	0	0
POST OFFICE BOX 158 KERSHAW, SC 29067				
STEPHEN D WILLIAMS	ASSISTANT SECRETARY AND TR 1 00	0	0	0
POST OFFICE BOX 158 KERSHAW, SC 29067				
LANNY M WILLIAMS	VICE PRESIDENT 1 00	0	0	0
POST OFFICE BOX 158 KERSHAW, SC 29067				
W JOEY MUNN	TREASURER 1 00	0	0	0
POST OFFICE BOX 158 KERSHAW, SC 29067				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
AMERICAN RED CROSS 106 CIRCLE WOODLAND DRIVE LANCASTER, SC 29020			DISASTER RELIEF	2,500
ANDREW JACKSON HIGH SCHOOL 6865 KERSHAW CAMDEN HWY KERSHAW, SC 29067			TROPHY CASE	11,220
ANDREW JACKSON MIDDLE SCHOOL 6865 KERSHAW CAMDEN HWY KERSHAW, SC 29067			SCHOOL FIELD TRIP	2,400
BARON DEKALB ELEMENTARY 2684 BARON DEKALB RD CAMDEN, SC 29020			AFTER SCHOOL PROGRAM	1,000
BLANEY ELEMENTARY SCHOOL 1621 SMYRNA RD ELGIN, SC 29045			SCHOOL SUPPLIES	900
BOY SCOUTS OF AMERICA - INDIAN WATERS COUNCIL 715 BETSY DR COLUMBIA, SC 29210			SUPPORT	3,500
CAMDEN ELEMENTARY SCHOOL 1304 LYTTLETON STREET CAMDEN, SC 29020			SCHOOL SUPPLIES	1,900
CAMDEN MIDDLE SCHOOL 902 MCRAE RD CAMDEN, SC 29020			SCHOOL SUPPLIES	500
CHILDREN'S COUNCIL 1240 CHILDRENS AVE LANCASTER, SC 29720			YOUTH CONFERENCE	1,000
CHRISTIAN SERVICES 101 SOUTH WHITE STREET LANCASTER, SC 29720			SUPPORT	3,000
CLINTON CHAPEL AME ZION CHURCH 105 N JOHNSON ST KERSHAW, SC 29067			REPAIRS AND MAINTENANCE	10,000
COLUMBUS PARKER TRACK CLUB PO BOX 145 LANCASTER, SC 29721			SUPPORT	1,000
COMMUNITY MEDICAL CLINIC 110C EAST DEKALB STREET CAMDEN, SC 29020			SUPPORT	10,000
DOBY'S MILL ELEMENTARY SCHOOL 1964 FORT JACKSON RD LUGOFF, SC 29078			SCHOOL SUPPLIES	3,000
GUM SPRINGS HOLINESS CHURCH 203 GUM SPRINGS RD TAYLORS, SC 29687			REPLACE ROOF	1,658
Total				277,863

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
KERSHAW AREA RESOURCE EXCHANGE 110 HART STREET KERSHAW, SC 29067			YOUTH SERVE PROGRAM	15,000
KERSHAW AREA MUSIC SUPPORTERS PO BOX 224 KERSHAW, SC 29067			EQUIPMENT AND COMPETITION SUPPORT	3,800
KERSHAW CHAMBER OF COMMERCE POST OFFICE BOX 441 KERSHAW, SC 29067			DOWNTOWN BEAUTIFICATION AND COMMUNITY EVENTS SUPPORT	14,825
KERSHAW COMMUNITY PARK COUNCIL 515 WALNUT STREET CAMDEN, SC 29020			LANDSCAPING AROUND AMPHITHEATER	13,000
KERSHAW CONSERVATION DISTRICT 1126 LITTLE STREET CAMDEN, SC 29020			SUPPORT	250
KERSHAW COUNTY FINE ARTS CENTER 810 LYTTLETON ST CAMDEN, SC 29020			LIGHTING FOR PERFORMING ARTS WING AND A/C UNIT	24,000
KERSHAW ELEMENTARY SCHOOL 108 NORTH ROLLINS DRIVE KERSHAW, SC 29067			SCHOOL FIELD TRIP	5,000
KERSHAW LIONS CLUB 125 BLACKMON STREET KERSHAW, SC 29067			FLAG DISPLAY	50
KERSHAW SECOND BAPTIST CHURCH 7737 KERSHAW CAMDEN HWY KERSHAW, SC 29067			MEDICAL CLINIC SUPPLIES	2,000
LANCASTER COUNTY COUNCIL OF THE AGING 309 STATE RD S-29-527 LANCASTER, SC 29720			SUPPORT	8,000
LANCASTER COUNTY COUNCIL OF THE ARTS 201 WEST GAY STREET LANCASTER, SC 29721			NUTCRACKER BALLET SUPPORT AND YOUTH SUMMER CAMP	7,500
LANCASTER COUNTY SCHOOL DISTRICT 300 SOUTH CATAWBA STREET LANCASTER, SC 29720			LITTLE FREE LIBRARIES AND BOOKS	5,000
MILITARY SPOUSAL SUPPORT CENTER 410 OAKLAND AVE ROCK HILL, SC 29730			SUPPORT	3,500
MT CALVARY OUTREACH CENTER PO BOX 96 KERSHAW, SC 29067			SUMMER YOUTH PROGRAM	20,000
MT OLIVE BAPTIST CHURCH 3788 TOM HORTON RD KERSHAW, SC 29067			REPLACE HEATING AND A/C SYSTEM	8,000
Total				277,863

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
MT ZION BAPTIST CHURCH 300 MONROE ST CAMDEN, SC 29020			SUPPORT FOR VAN PURCHASE	5,000
NORTH CENTRAL HIGH SCHOOL 3000 LOCKHART RD KERSHAW, SC 29067			ATHLETIC EQUIPMENT AND UNIFORMS	5,000
OPERATION RUDOLPH 7048 HILTON DRIVE KERSHAW, SC 29067			SUPPORT	15,360
PLEASANT VALLEY BAPTIST CHURCH 211 MARVIN RD INDIAN LAND, SC 29707			SUPPORT	7,500
SALEM UNITED METHODIST CHURCH 201 SOUTH MAIN STREET HEATH SPRINGS, SC 29058			SUPPORT	2,000
TOWN OF BETHUNE 101 ELM ST BETHUNE, SC 29009			DOWNTOWN BEAUTIFICATION AND ELECTRONIC MESSAGE BOARD	10,000
TOWN OF HEATH SPRINGS PO BOX 100 HEATH SPRINGS, SC 29058			JULY 4TH CELEBRATION AND PARADE	1,000
TOWN OF KERSHAW 113 SOUTH HAMPTON STREET KERSHAW, SC 29067			NEW BAND STAND AND VETERANS MEMORIAL MONUMENT	26,000
UNITED CITIZENS CLUB OF HEATH SPRINGS 119 CASKEY ST HEATH SPRINGS, SC 29058			SUPPORT	2,000
UNITED WAY OF KERSHAW COUNTY 110 DEKALB STREET SUITE 1A CAMDEN, SC 29021			SUPPORT	3,500
UNITED WAY OF LANCASTER COUNTY 109 SOUTH WYLIE STREET LANCASTER, SC 29720			SUPPORT	3,500
USC EDUCATION FOUNDATION 1600 HAMPTON ST COLUMBIA, SC 29208			MEDICAL SCHOOL SCHOLARSHIPS	10,000
WATEREE ELEMENTARY SCHOOL 424 WILDWOOD LANE LUGOFF, SC 29720			EDUCATIONAL SOFTWARE	3,500
Total			3a	277,863

TY 2015 Accounting Fees Schedule

Name: JOHN T STEVENS FOUNDATION

EIN: 57-6005554

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	8,490	0		0

TY 2015 Investments Corporate Bonds Schedule

Name: JOHN T STEVENS FOUNDATION

EIN: 57-6005554

Name of Bond	End of Year Book Value	End of Year Fair Market Value
CORPORATE BONDS	60,878	60,878

TY 2015 Investments Corporate Stock Schedule

Name: JOHN T STEVENS FOUNDATION

EIN: 57-6005554

Name of Stock	End of Year Book Value	End of Year Fair Market Value
CORPORATE STOCK	5,442,763	5,442,763

TY 2015 Investments Government Obligations Schedule

Name: JOHN T STEVENS FOUNDATION

EIN: 57-6005554

US Government Securities - End of

Year Book Value:

1,366,766

US Government Securities - End of

Year Fair Market Value:

1,366,766

**State & Local Government
Securities - End of Year Book**

Value:

0

**State & Local Government
Securities - End of Year Fair**

Market Value:

0

TY 2015 Other Decreases Schedule

Name: JOHN T STEVENS FOUNDATION

EIN: 57-6005554

Description	Amount
EXCISE TAX PROVISION	9,495

TY 2015 Other Expenses Schedule

Name: JOHN T STEVENS FOUNDATION

EIN: 57-6005554

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MISCELLANEOUS	8,451	0		0
INSURANCE	965	0		0

TY 2015 Other Increases Schedule

Name: JOHN T STEVENS FOUNDATION

EIN: 57-6005554

Description	Amount
UNREALIZED GAIN ON INVESTMENTS	143,902