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For calendar year 2016, or tax year beginning 01-01-2016, and ending 12-31-2016

Name of foundation THE AVERY FAMILY FOUNDATION INC		A Employer identification number 20-8091168	
% PAUL E AVERY			
Number and street (or P O box number if mail is not delivered to street address) 16205 SONSOLES DE AVILA	Room/suite	B Telephone number (see instructions)	
City or town, state or province, country, and ZIP or foreign postal code TAMPA, FL 33613		C If exemption application is pending, check here ☐	
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) \$ 493,993	J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	0			
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	22,217	22,217	22,217	
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	-1,123			
	b Gross sales price for all assets on line 6a _____ 225,226				
	7 Capital gain net income (from Part IV, line 2)		0		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances _____				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	21,094	22,217	22,217	
	13 Compensation of officers, directors, trustees, etc	0			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	975	975	975	0
	c Other professional fees (attach schedule)	6,050	6,050	6,050	
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	11,901	259	259	
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)				
	24 Total operating and administrative expenses. Add lines 13 through 23	18,926	7,284	7,284	0
	25 Contributions, gifts, grants paid	202,425			202,425
	26 Total expenses and disbursements. Add lines 24 and 25	221,351	7,284	7,284	202,425
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-200,257			
	b Net investment income (if negative, enter -0-)		14,933		
				14,933	

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					
	2	Savings and temporary cash investments	117,261	27,812	27,812		
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____					
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____					
	5	Grants receivable					
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)					
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____					
	8	Inventories for sale or use					
	9	Prepaid expenses and deferred charges					
	10a	Investments—U S and state government obligations (attach schedule)					
	b	Investments—corporate stock (attach schedule)	361,260	273,346	281,134		
	c	Investments—corporate bonds (attach schedule)					
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____					
	12	Investments—mortgage loans					
	13	Investments—other (attach schedule)	215,374	192,480	185,047		
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____					
15	Other assets (describe ▶ _____)						
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	693,895	493,638	493,993			
Liabilities	17	Accounts payable and accrued expenses					
	18	Grants payable					
	19	Deferred revenue					
	20	Loans from officers, directors, trustees, and other disqualified persons					
	21	Mortgages and other notes payable (attach schedule)					
	22	Other liabilities (describe ▶ _____)					
	23	Total liabilities (add lines 17 through 22)	0	0			
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.						
	24	Unrestricted					
	25	Temporarily restricted					
	26	Permanently restricted					
	Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.						
	27	Capital stock, trust principal, or current funds					
	28	Paid-in or capital surplus, or land, bldg , and equipment fund					
	29	Retained earnings, accumulated income, endowment, or other funds	693,895	493,638			
	30	Total net assets or fund balances (see instructions)	693,895	493,638			
31	Total liabilities and net assets/fund balances (see instructions) .	693,895	493,638				

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)	1 693,895
2	Enter amount from Part I, line 27a	2 -200,257
3	Other increases not included in line 2 (itemize) ▶ _____	3 _____
4	Add lines 1, 2, and 3	4 493,638
5	Decreases not included in line 2 (itemize) ▶ _____	5 _____
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6 493,638

Part IV Capital Gains and Losses for Tax on Investment Income

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 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			(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	
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	-1,123
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))
2015	206,120	566,343	0 363949
2014	109,665	533,522	0 205549
2013	89,080	525,752	0 169433
2012	57,225	93,180	0 614134
2011	59,305	17,736	3 343764
2 Total of line 1, column (d)			2 4 696829
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 939366
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5			4 570,407
5 Multiply line 4 by line 3			5 535,821
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 149
7 Add lines 5 and 6			7 535,970
8 Enter qualifying distributions from Part XII, line 4			8 202,425

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b	1	299
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	
3	Add lines 1 and 2.	3	299
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	299
6	Credits/Payments		
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a	
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d.	7	0
8	Enter any penalty for underpayment of estimated tax. Check here ☐ 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	299
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 2017 estimated tax ▶ Refunded ▶	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? <i>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</i>	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 ▶ \$ _____ (2) On foundation managers ▶ \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities</i>	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? <i>If "Yes," attach a conformed copy of the changes</i>	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? <i>If "Yes," attach the statement required by General Instruction T</i>	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	Yes
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ FL _____		
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? <i>If "No," attach explanation</i> .	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 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>	9	No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i> 	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 ►	13	Yes	
14	The books are in care of ► PAUL E AVERY Telephone no ► (813) 765-1111			

Located at ► 16205 SONSOLES DE AVILA TAMPA FL ZIP+4 ► 33613

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 2016, 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	Yes	No
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 ►				

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)		Yes	No
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No		
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No		
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☒ No		
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No		
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days).	☐ Yes ☒ No		
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	☐	1b	
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 2016?		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 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016?	☐ 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	No
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 2016 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2016).		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 2016?		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)? ☐ Yes ☒ No Organizations relying on a current notice regarding disaster assistance check here. ☐ Yes ☒ No	5b		
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? ☐ Yes ☐ No If "Yes" to 6b, file Form 8870	6b		
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? ☐ Yes ☒ No	7b		No

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
PAUL E AVERY 16205 SONSOLES DE AVILA TAMPA, FL 33606	DIRECTOR 10 0	0	0	0
SUZANNE M AVERY 16205 SONSOLES DE AVILA TAMPA, FL 33606	DIRECTOR 10 0	0	0	0
PAUL JACOBS 3083 DALE CREEK DRIVE NORTH CLEARWATER, FL 33761	DIRECTOR 10 0	0	0	0
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	Title, and average hours per week (b) devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
Total number of other employees paid over \$50,000. ☐ Yes ☒ No				

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

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

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

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1	
2	
3	
4	

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

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities.	1a	506,467
b	Average of monthly cash balances.	1b	72,626
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	579,093
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	579,093
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	8,686
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	570,407
6	Minimum investment return. Enter 5% of line 5.	6	28,520

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	28,520
2a	Tax on investment income for 2016 from Part VI, line 5.	2a	299
b	Income tax for 2016 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	299
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	28,221
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	28,221
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	28,221

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	202,425
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	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	4	202,425
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	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	202,425

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 2015	(c) 2015	(d) 2016
1	Distributable amount for 2016 from Part XI, line 7				28,221
2	Undistributed income, if any, as of the end of 2016				
a	Enter amount for 2015 only.			0	
b	Total for prior years 2014, 2013, 2012		0		
3	Excess distributions carryover, if any, to 2016				
a	From 2011.	58,458			
b	From 2012.	52,566			
c	From 2013.	70,502			
d	From 2014.	83,046			
e	From 2015.	189,445			
f	Total of lines 3a through e.	454,017			
4	Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ <u>202,425</u>				
a	Applied to 2015, but not more than line 2a			0	
b	Applied to undistributed income of prior years (Election required—see instructions).				
c	Treated as distributions out of corpus (Election required—see instructions).				
d	Applied to 2016 distributable amount.				28,221
e	Remaining amount distributed out of corpus	174,204			
5	Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a))				
6	Enter the net total of each column as indicated below:				
a	Corpus Add lines 3f, 4c, and 4e Subtract line 5	628,221			
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.				
d	Subtract line 6c from line 6b Taxable amount—see instructions.		0		
e	Undistributed income for 2015 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 2017.				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).				
8	Excess distributions carryover from 2011 not applied on line 5 or line 7 (see instructions). . . .	58,458			
9	Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a.	569,763			
10	Analysis of line 9				
a	Excess from 2012.	52,566			
b	Excess from 2013.	70,502			
c	Excess from 2014.	83,046			
d	Excess from 2015.	189,445			
e	Excess from 2016.	174,204			

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2016, enter the date of the ruling. ▶

b Check box to indicate whether the organization is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2016	(b) 2015	(c) 2014	(d) 2013	
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))
PAUL AVERY

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 email address of the person to whom applications should be addressed

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

c Any submission deadlines

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

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

Recipient	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> See Additional Data Table				
Total			3a	202,425
b <i>Approved for future payment</i>				
Total			3b	

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2016)

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

		Yes	No
--	--	-----	----

1a(1)	No
-------	----

1a(2)	No
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--	--	--

1b(1)	No
--------------	-----------

1b(2)		No
--------------	--	-----------

1b(3)		No
--------------	--	-----------

1b(4)	No
-------	----

1b(5)		No
--------------	--	-----------

1b(6)		No
--------------	--	-----------

1c		No
----	--	----

value

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations?

☐ Yes ☒ No

— 1.00 — — 1.75

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, this return and the accompanying schedules and statements are true, correct, and complete.

***** 2017-05-12 *****
 Signature of officer or trustee Date Title

May the IRS discuss this return with the preparer shown below
(see instr 1)? ☒ Yes ☐ No

Print/Type preparer's name Raymond M Leich	Preparer's Signature	Date	Check if self-employed ☐	PTIN P01036465
Firm's name ▶ LEICH & TEELING CPA PA				Firm's EIN ▶
Firm's address ▶ 704 W BAY STREET TAMPA, FL 33606				Phone no (813) 251-6662

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	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
44 ABBVIE		2016-07-12	2016-09-28
28 ALTIRA GROUP INC COM		2015-05-22	2016-04-14
32 ASTRAZENICA PLC SPONS ADR		2016-08-03	2016-09-28
63 BCE INC CDA COM US SHS			2016-09-28
89 BP PLC SPONS ADR		2015-05-22	2016-02-25
25 CARE CAPITAL PROPERTIES INC		2015-05-22	2016-01-06
33 COCA-COLA CO COM		2016-08-03	2016-09-28
11 CONSOLIDATED EDISON INC COM		2016-01-08	2016-09-28
11 CROWN CASTLE INTL CORP REIT		2016-07-22	2016-09-28
28 EXXON MOBIL CORP		2016-01-06	2016-09-28

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)
2,826		2,880	-54
1,740		1,440	300
1,082		1,086	-4
2,898		2,992	-94
2,535		3,787	-1,252
789		866	-77
1,390		1,434	-2
851		732	119
1,043		1,088	-33
2,426		2,161	265

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	
			-54
			300
			-4
			-94
			-1,252
			-77
			-44
			119
			-45
			265

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	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
56 GLAXOSMITHKLINE PLC ADR		2016-01-06	2016-11-16
174 HCP INC REIT		2015-05-22	2016-01-07
83 KINDER MORGAN INC		2015-05-22	2016-01-06
144 KRAFT HEINZ CO		2015-05-22	
28 MCDONALDS CORP		2015-05-22	2016-02-03
119 OMEGA HEALTHCARE		2016-04-06	2016-07-12
6 PHILIP MORRIS INTL		2015-05-22	2016-04-14
20 PHILIP MORRIS INTL		2016-01-06	2016-04-14
2 RMR GROUP INC CL A		2015-12-14	2016-01-06
178 REYNOLDS AMERICAN INC		2015-05-22	

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)
2,148		2,263	-115
6,445		6,890	-445
1,241		3,554	-2,313
11,405		10,338	1,067
3,412		2,780	632
3,937		4,214	-277
602		506	96
2,008		1,757	251
32		25	7
8,479		6,722	1,757

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	
			-115
			-445
			-2,313
			1,067
			632
			-277
			96
			251
			7
			1,757

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	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
54 REYNOLDS AMERICAN INC		2016-10-13	2016-10-21
162 ROYAL DUTCH SHELL PLC		2015-05-22	2016-01-08
66 SANOFI SPONS ADR		2016-04-14	2016-09-28
188 SENIOR HOUSING PPTYS TR		2015-05-22	2016-01-06
27 TALEN ENERGY CORP		2015-05-22	2016-01-06
218 TOTAL SA SPONS ADR		2015-05-22	2016-01-06
98 VODAFONE GROUP SPONS ADR			2016-09-28
199 WILLIAMS COS INC COM		2015-05-22	2016-01-06
180 FEDERATED STRATEGIC VALUE-		2015-12-03	2016-09-28
82 AT&T INC		2015-05-22	2016-09-28

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)
2,951		2,545	406
6,538		10,071	-3,533
2,542		2,881	-339
2,911		3,690	-779
161		537	-376
9,301		11,474	-2,173
2,886		3,249	-363
4,869		10,568	-5,699
1,128		1,000	128
3,331		2,845	486

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	
			406
			-3,533
			-339
			-779
			-376
			-2,173
			-363
			-5,699
			128
			486

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	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
73 ALTRIA GROUP INC		2015-05-22	
13 AMERICAN ELEC PWR INC		2015-05-22	2016-09-28
40 BP PLC SPONS ADR		2015-05-22	2016-09-28
13 CHEVRON CORP		2015-05-22	2016-09-28
19 DOMINION RES INC VA		2015-05-22	2016-09-28
28 DUKE ENERGY CORP		2015-05-22	2016-09-28
61 GENERAL MILLS INC COM		2015-05-22	
119 GLAXOSMITHKLINE PLC ADR		2015-05-22	
39 JOHNSON & JOHNSON		2015-05-22	
15 KIMBERLY-CLARK CORP		2015-05-22	2016-09-28

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

(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)
4,826		3,754	1,072
849		724	125
1,382		1,702	-320
1,319		1,366	-47
1,438		1,368	70
2,268		2,132	136
4,247		3,454	793
5,106		5,411	-305
4,688		3,970	718
1,889		1,675	214

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			(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
			1,072
			125
			-320
			-47
			70
			136
			793
			-305
			718
			214

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	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
22 KRAFT HEINZ CO		2015-05-22	2016-07-12
29 KRAFT HEINZ CO		2015-05-22	
19 MCDONALDS CORP		2015-05-22	2016-09-28
112 MERCK AND INC		2015-05-22	
41 NATIONAL GRID TRANSCO PLC		2015-05-22	2016-09-28
42 PPL CORP		2015-05-22	2016-09-28
7 PEPSICO INC		2015-05-22	2016-09-28
29 PHILIP MORRIS INTL		2015-05-22	2016-09-28
61 PROCTER & GAMBLE		2015-05-22	
41 REALTY INCOME CORP REIT		2015-05-22	

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)
1,952		1,567	385
2,549		2,051	498
2,181		1,886	295
7,036		6,668	368
2,940		2,928	12
1,469		1,345	124
750		676	74
2,874		2,446	428
5,332		4,901	431
2,829		1,913	916

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			(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			385
			498
			295
			368
			12
			124
			74
			428
			431
			916

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	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
282 REYNOLDS AMERICAN INC		2015-05-22	
45 SOUTHERN CO		2015-05-22	2016-09-28
100 UNILEVER PLC ADR		2015-05-22	
42 VENTAS INC REIT		2015-05-22	
58 VERIZON COMMUNICATIONS		2015-05-22	2016-09-28
18 WELLTOWER INC REIT		2015-05-22	2016-09-28
621 DOUBLELINE TOTAL RETURN BD		2014-08-29	2016-09-28
40 86 EATON VANCE FLTG-RT		2014-08-29	2016-09-28
3464 84 FEDERATED STRATEGIC VA			2016-09-28
1320 76 PIMCO INVT GRADE CORP		2014-08-29	2016-09-28

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)
14,983		10,650	4,333
2,371		1,942	429
4,519		4,461	58
2,912		2,512	400
3,010		2,887	123
1,368		1,278	90
6,800		6,831	-31
360		371	-11
21,655		21,482	173
14,000		14,277	-277

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	
			4,333
			429
			58
			400
			123
			90
			-31
			-11
			173
			-277

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	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
116 59 OSTERWEIS STRATEGIC INC		2014-08-29	2016-09-28
CAPITAL GAIN DIVIDENDS	P		

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)
1,300		1,400	-100
			117

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	
			-100

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				
FRIEDREICH'S ATAXIA RESEARCH ALLIANCE 102 PICERING WAY SUITE 200 EXTON, PA 19341			MEDICAL RESEARCH	163,500
BERKELEY PREPARATORY SCHOOL 4811 KELLY ROAD TAMPA, FL 33615			SCHOLARSHIP, ENDOWMENT, & FINANCIAL AID	370
PAUL SMITHS COLLEGE ROUTE 86 30 PO BOX 265 PAUL SMITHS, NY 12970			GENERAL SUPPORT	2,000
ADK ACTION PO BOX 655 SARANAC LAKE, NY 12944			CONTRIBUTION	125
ARTA 185 WEST END AVE SUITE 6C NEW YORK, NY 10023			CONTRIBUTION	100
CANINE COMPANIONS FOR INDEPENDENCE PO BOX 446 SANTA ROSA, CA 95402			CONTRIBUTION	4,320
CUBAN ARTS GROUP INC 11111 11111111 TAMPA, FL 99999			CONTRIBUTION	250
CURE FA FOUNDATION 211 STUYVESANT AVE RYE, NY 10580			CONTRIBUTION	10,000
DUANE VOLUNTEER FIRE COMPANY 123 DEER RIVER DR MALONE, NY 12953			CONTRIBUTION	250
ELON UNIVERSITY - ELON DAY 100 CAMPUS DR ELON, NC 27244			CONTRIBUTION	250
NATIONAL PEDIATRIC CANCER FOUNDATION 5550 WEST EXECUTIVE DRIVE SUITE 300 TAMPA, FL 33609			CONTRIBUTION	11,000
FLORIDA SHERIFFS ASSOCIATION 2617 MAHAN DRIVE TALLAHASSEE, FL 32317			CONTRIBUTION	25
MORNING STAR SCHOOL TENNIS CLASSIC 210 E LINEBAUGH AVE TAMPA, FL 33612			CONTRIBUTION	500
FOUNDATION FOR MISSISSIPPI PO BOX 571 JACKSON, MS 39205			CONTRIBUTION	200
WOMANADE OF TAMPA PO BOX 340736 TAMPA, FL 336940736			CONTRIBUTION	40
Total ► 3a				202,425

Form 990FP 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				
FRIENDS OF JOSHUA HOUSE FOUNDATION PO BOX 26333 TAMPA, FL 33623			CONTRIBUTION	550
JUDEO CHRISTIAN HEALTH CLINIC 4118 N MACDILL AVE TAMPA, FL 33607			CONTRIBUTION	200
MANATEE COMMUNITY FOUNDATION 2820 MANATEE AVE W BRADENTON, FL 34205			CONTRIBUTION	350
METROPOLITAN MINISTRIES 2002 N FLORIDA AVE TAMPA, FL 33602			CONTRIBUTION	350
LIFT INC 1620 I STREET NW SUITE 820 WASHINGTON, DC 20006			CONTRIBUTION	2,500
RUTH ECKERD HALL 1111 MCMULLEN BOOTH ROAD CLEARWATER, FL 33759			CONTRIBUTION	200
SARANAC LAKE VOLUNTEER FIRE DEPT 100 BROADWAY STREET SARANAC LAKE, NY 12983			CONTRIBUTION	25
STARTING RIGHT NOW 16057 TAMPA PALMS BLVD SUITE 231 TAMPA, FL 33647			CONTRIBUTION	2,195
TAMPA BAY SPORTING CLAYS 10514 EHREN CUTOFF LAND OLAKES, FL 34639			CONTRIBUTION	1,500
THE SCARF SOCIETY INC 8640 TARPON SPRINGS ROAD ODESSA, FL 33556			CONTRIBUTION	1,000
UNIVERSITY OF TAMPA 401 W KENNEDY BLVD TAMPA, FL 33606			CONTRIBUTION	125
ST JUDE CHILDREN'S HOSPITAL 262 DANNY THOMAS PLACE MEMPHIS, TN 38105			CONTRIBUTION	500
Total ► 3a				202,425

TY 2016 Accounting Fees Schedule**Name:** THE AVERY FAMILY FOUNDATION INC**EIN:** 20-8091168

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX RETURN PREPARATION	975	975	975	

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2016 Depreciation Schedule

Name: THE AVERY FAMILY FOUNDATION INC

EIN: 20-8091168

TY 2016 Investments Corporate Stock Schedule**Name:** THE AVERY FAMILY FOUNDATION INC**EIN:** 20-8091168

Name of Stock	End of Year Book Value	End of Year Fair Market Value
SUNTRUST MUTUAL FUNDS	273,346	281,134

TY 2016 Investments - Other Schedule

Name: THE AVERY FAMILY FOUNDATION INC

EIN: 20-8091168

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
BONDS		192,480	185,047

TY 2016 Other Decreases Schedule

Name: THE AVERY FAMILY FOUNDATION INC
EIN: 20-8091168

Description	Amount
VALUATION ALLOWANCE REVERSAL	0

TY 2016 Other Expenses Schedule**Name:** THE AVERY FAMILY FOUNDATION INC**EIN:** 20-8091168**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ANNUAL REPORT FILING				

TY 2016 Other Income Schedule**Name:** THE AVERY FAMILY FOUNDATION INC**EIN:** 20-8091168**Other Income Schedule**

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
CAPITAL GAIN DISTRIBUTIONS			
NON DIVIDEND DISTRIBUTIONS			
CANCELLED CHECK FROM PREVIOUS YEAR			

TY 2016 Other Professional Fees Schedule**Name:** THE AVERY FAMILY FOUNDATION INC**EIN:** 20-8091168

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT FEES	6,050	6,050	6,050	

**TY 2016 Substantial Contributors
Schedule****Name:** THE AVERY FAMILY FOUNDATION INC**EIN:** 20-8091168**Name****Address**

PAUL AVERY

16205 SONSOLES DE AVILA
TAMPA, FL 33613

TY 2016 Taxes Schedule**Name:** THE AVERY FAMILY FOUNDATION INC**EIN:** 20-8091168

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FORIEGN TAXES	259	259	259	