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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

▶ Do not enter social security numbers on this form as it may be made public.
▶ Information about Form 990-PF and its instructions is at *www.irs.gov/form990pf*.

OMB No 1545-0052

2016

Open to Public Inspection

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

Name of foundation
THE THOMAS B STANLEY JR AND
RUTH B STANLEY FAMILY FOUNDATION INC

A Employer identification number
27-1437797

Number and street (or P O box number if mail is not delivered to street address)
1350 N ORANGE AVENUE NO 229

Room/suite

B Telephone number (see instructions)
(407) 740-6262

City or town, state or province, country, and ZIP or foreign postal code
ORLANDO, FL 32789

C If exemption application is pending, check here ▶ ☐

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

D 1. Foreign organizations, check here ▶ ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

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

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

I Fair market value of all assets at end of year *(from Part II, col (c), line 16)*▶$ 2,000,204

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

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

Part I **Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))*

			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)				
	2	Check ▶ ☑ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments	18,318	18,318	18,318	
	4	Dividends and interest from securities	69,442	69,442	69,442	
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	-15,854			
	b	Gross sales price for all assets on line 6a 426,014				
	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				
	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	71,906	87,760	87,760	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	0	0	0	0
	14	Other employee salaries and wages	9,069	454	8,615	8,615
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)	1,000	50	950	950
	c	Other professional fees (attach schedule)	7,903	7,903	0	0
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	2,564	155	753	753
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy	9,073	454	8,619	8,619
	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	29,609	9,016	18,937	18,937
	25	Contributions, gifts, grants paid	86,000			86,000
	26	**Total expenses and disbursements.** Add lines 24 and 25	115,609	9,016	18,937	104,937
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	-43,703			
	b	**Net investment income** (if negative, enter -0-)		78,744		
	c	**Adjusted net income**(if negative, enter -0-)			68,823	

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 (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets				
1	Cash—non-interest-bearing	109,170	2,051	2,051
2	Savings and temporary cash investments		93,278	93,278
3	Accounts receivable ▶			
	Less allowance for doubtful accounts ▶	7,623		
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)	1,140,065	1,249,624	1,415,001
c	Investments—corporate bonds (attach schedule)	74,555		
11	Investments—land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
12	Investments—mortgage loans			
13	Investments—other (attach schedule)	532,566	433,816	489,874
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)	1,863,979	1,778,769	2,000,204
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 ▶)	1,120	1,030	
23	**Total liabilities**(add lines 17 through 22)	1,120	1,030	
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	1,862,859	1,777,739	
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)	1,862,859	1,777,739	
31	**Total liabilities and net assets/fund balances** (see instructions)	1,863,979	1,778,769	

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	1,862,859
2	Enter amount from Part I, line 27a	2	-43,703
3	Other increases not included in line 2 (itemize) ▶	3	0
4	Add lines 1, 2, and 3	4	1,819,156
5	Decreases not included in line 2 (itemize) ▶	5	41,417
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	1,777,739

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)
1 a	BB&T #23218316			
b	BB&T #23218316			
c	BB&T #41762907			
d	BB&T #41762907			
e	CAPITAL GAINS DIVIDENDS	P		

	(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	8,143		8,969	-826
b	281,850		327,810	-45,960
c	14,266		17,285	-3,019
d	114,079		87,804	26,275
e	7,676			7,676

	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				-826
b				-45,960
c				-3,019
d				26,275
e				7,676

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**	-15,854
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**	-3,845

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	88,350	1,833,955	0 048175
2014	80,035	2,020,648	0 039609
2013	77,691	1,820,822	0 042668
2012	71,040	1,799,576	0 039476
2011	73,413	1,742,297	0 042136

2	**Total** of line 1, column (d)	**2**	0 212064
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 042413
4	Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	**4**	1,932,741
5	Multiply line 4 by line 3	**5**	81,973
6	Enter 1% of net investment income (1% of Part I, line 27b)	**6**	787
7	Add lines 5 and 6	**7**	82,760
8	Enter qualifying distributions from Part XII, line 4	**8**	104,937

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	787
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	787
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	787
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	787
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)?	1b		No
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		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) ▶ 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? *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 2016 or the taxable year beginning in 2016 (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)

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		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?	13	Yes	

Website address ▶N/A

14 The books are in care of ▶SUSAN STANLEY TAYLOR Telephone no ▶(407) 740-6262

Located at ▶1350 N ORANGE AVENUE SUITE 229 WINTER PARK FL ZIP+4 ▶32789

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** —Check here ▶ ☐
and enter the amount of tax-exempt interest received or accrued during the year ▶ | 15 |

			Yes	No
16	At any time during calendar year 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		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

			Yes	No
	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? ☐ Yes ☑ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☑ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☑ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☑ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☑ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☑ No			
b	If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	1b		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 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		
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)

			Yes	No
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	**(e)** Expense account, other allowances
THOMAS B STANLEY III 1500 W WESLEY ROAD ATLANTA, GA 30327	PRESIDENT 1 00	0	0	0
SUSAN STANLEY TAYLOR 1350 N ORANGE AVE SUITE 229 WINTER PARK, FL 32789	SECRETARY & TREASURER 1 00	0	0	0
ANDREW B STANLEY 1350 N ORANGE AVE SUITE 229 WINTER PARK, FL 32789	VICE PRESIDENT 1 00	0	0	0

2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than $50,000	Title, and average hours per week **(b)** devoted to position	**(c)** Compensation	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
NONE				

Total number of other employees paid over $50,000 ▶ 0

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

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

(a) Name and address of each person paid more than $50,000	**(b)** Type of service	**(c)** Compensation
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**	
Total. Add lines 1 through 3 . . . . ▶	0

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	1,789,800
b	Average of monthly cash balances.		1b	172,374
c	Fair market value of all other assets (see instructions).		1c	0
d	**Total** (add lines 1a, b, and c).		1d	1,962,174
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	1,962,174
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).		4	29,433
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4		5	1,932,741
6	**Minimum investment return.** Enter 5% of line 5.		6	96,637

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	96,637
2a	Tax on investment income for 2016 from Part VI, line 5.	2a 787		
b	Income tax for 2016 (This does not include the tax from Part VI).	2b		
c	Add lines 2a and 2b.		2c	787
3	Distributable amount before adjustments Subtract line 2c from line 1.		3	95,850
4	Recoveries of amounts treated as qualifying distributions.		4	0
5	Add lines 3 and 4.		5	95,850
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	95,850

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	104,937
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	104,937
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	787
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4.	6	104,150

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				95,850
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only.			33,336	
b Total for prior years 20___ , 20___ , 20___		0		
3 Excess distributions carryover, if any, to 2016				
a From 2011.				
b From 2012.				
c From 2013.				
d From 2014.				
e From 2015.				
f **Total** of lines 3a through e.	0			
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ $ 104,937				
a Applied to 2015, but not more than line 2a			33,336	
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 2016 distributable amount.				71,601
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2016 *(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 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				24,249
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 2011 not applied on line 5 or line 7 (see instructions) . . .	0			
9 **Excess distributions carryover to 2017.** Subtract lines 7 and 8 from line 6a	0			
10 Analysis of line 9				
a Excess from 2012. . . .				
b Excess from 2013. . . .				
c Excess from 2014. . . .				
d Excess from 2015. . . .				
e Excess from 2016. . . .				

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))

See Additional Data Table

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 Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year* See Additional Data Table				
Total . . . . ▶ **3a**				86,000
b *Approved for future payment*				
Total . . . . ▶ **3b**				0

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments. . . .					
3 Interest on savings and temporary cash investments	561000	18,318			
4 Dividends and interest from securities. . . .	561000	69,442			
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	561000	-15,854			
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue					
a OTHER INCOME			14		
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e). .		71,906		0	0

13 **Total.** Add line 12, columns (b), (d), and (e). 13 71,906

(See worksheet in line 13 instructions to verify calculations)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)

Part XVII **Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations**

		Yes	No
1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501 (c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash.	1a(1)		No
(2) Other assets.	1a(2)		No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization.	1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization.	1b(2)		No
(3) Rental of facilities, equipment, or other assets.	1b(3)		No
(4) Reimbursement arrangements.	1b(4)		No
(5) Loans or loan guarantees.	1b(5)		No
(6) Performance of services or membership or fundraising solicitations.	1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c		No

d If the answer to any of the above is "Yes," complete the following schedule Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received

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

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?. ☐ Yes ☑ No

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge

******	2017-05-15	******
Signature of officer or trustee	Date	Title

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

Paid Preparer Use Only

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ▶ ☐	PTIN
CHERYL B MORRISON				P00739907

Firm's name ▶ DAVIS GROUP PA — Firm's EIN ▶27-3509345

Firm's address ▶ 518 S MAGNOLIA AVE SUITE 110
ORLANDO, FL 32801 — Phone no (407) 434-7900

Form 990PF Part XV Line 1a - 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).

THOMAS B STANLEY III
SUSAN STANLEY TAYLOR
ANDREW B STANLEY

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
ADULT DAY CARE CENTER OF MARTINSVILLE 431 COMMONSWEALTH BLVD EAST MARTINSVILLE, VA 24112			GENERAL SUPPORT	1,000
ALL ABOUT DEVELOPMENTAL DISABILITIES 125 CLAIRMONT AVE SUITE 300 DECATUR, GA 30030			GENERAL SUPPORT	3,500
ARTS COUNCIL OF MOORE COUNTY PO BOX 405 SOUTHERN PINES, NC 28388			FOR TRAVIS-BARNES SCHOLARSHIP FUND	500
ATLANTA BOTANICAL GARDENS 1345 PIEDMONT AVE NE ATLANTA, GA 30309			FOR NATIVE PLANT PROGRAM IN HONOR OF TOM AND RUTH STANLEYIN HONOR OF TOM AND RUTH STANLEY	1,000
ATLANTA CELEBRATES PHOTOGRAPHY 1135 SHERIDAN RD ATLANTA, GA 30324			GENERAL SUPPORT	2,000
ATLANTA INTERNATIONAL SCHOOL 2890 N FULTON DRIVE ATLANTA, GA 30305			FOR THINKING FORWARD PROGRAM	2,500
BASSETT MEMORIAL UNITED METHODIST CHURCH PO BOX 408 BASSETT, VA 20455			IN MEMORY OF ROXANN BASSETT DILLON	250
BASSETT RESCUE SQUAD PO BOX 510 BASSETT, VA 24055			GENERAL SUPPORT	2,250
BLUE HILL PUBLIC LIBRARY 5 PARKER POINT RD BLUE HILL, ME 04614			GENERAL SUPPORT	2,000
BLUE HILL SOCIETY FOR AID TO CHILDREN 2964 FAIRYSTONE PARK HIGHWAY BASSETT, VA 24055			NICHOLAS DAY CAMP	500
BPLA DBA BASSETT HISTORICAL CENTER PO BOX 472 BLUE HILL, ME 04614			GENERAL SUPPORT	1,000
CHATTAHOCHEE RIVERKEEPER INC 3 PURITA ATLANTA, GA 30318			GENERAL SUPPORT	1,000
CHRISTMAS CHEER PO BOX 540 MARTINSVILLE, VA 24114			GENERAL SUPPORT	4,000
COMMUNITY FOUNDATION OF ATLANTA 50 HURT PLAZA SE SUITE 449 ATLANTA, GA 30303			METRO ARTS OF ATLANTA	1,000
COMMUNITY STOREHOUSE PO BOX 3015 MARTINSVILLE, VA 24115			FOOD FOR KIDS PROGRAM	4,000
Total . . . . ▶ **3a**				86,000

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
FIRST CONGRETIONAL CHURCH OF BLUE HILL PO BOX 444 BASSETT, ME 04614			FUEL ASSISTANCE PROGRAM/DOLLY FISHER FUND	1,500
FAITH HOUSE PO BOX 1964 CLAYTON, GA 30525			GENERAL SUPPORT	1,000
FRIENDS OF INFINITY ACRES 136 JOPPA ROAD RIDGEWAY, VA 24148			GENERAL SUPPORT	1,000
FRIENDS OF THE BLUE RIDGE LIBRARIES PO BOX 3967 MARTINSVILLE, VA 24155			FOR BASSETT BRANCH SUMMER READING PROGRAMS	3,000
GRACE NETWORK PO BOX 3902 MARTINSVILLE, VA 24115			GENERAL SUPPORT	5,000
GREATER BASSETT AREA COMMUNITY INC 3289 RIVERSIDE DRIVE BASSETT, VA 24055			GENERAL SUPPORT	3,500
HEALTHY ACADIA 140 STATE STREET SUITE 1 ELLSWORTH, ME 04605			GLEANING INITIATIVE AND SUBSTANCE PREVENTION AND TREATMENT INITIATIVES	2,000
HEALTHY PENINSULA PO BOX 945 BLUE HILL, ME 04605			MAGIC FOOD BUS	1,000
HELPING HANDS INC PO BOX 429 ROCKY MOUNT, VA 24151			GENERAL SUPPORT	1,000
HENRY COUNTY FOOD PANTRY INC 3289 RIVERSIDE DRIVE BASSETT, VA 24055			GENERAL SUPPORT	1,000
JUPITER ISLAND GARDEN CLUB PO BOX 1410 HOBE SOUND, FL 33475			POST STORM REPAIR FOR GARDEN ISLAND	1,000
KAMP KUDZU 5885 GLENRIDGE DRIVE SUITE 160 ATLANTA, GA 30328			GENERAL SUPPORT	500
KENNESAW STATE UNIVERSITY FOUNDATION 3391 TOWN POINT DRIVE NW KENNESAW, GA 30144			SCHOOL OF THE ARTS AND ACADEMY OF INCLUSIVE LEARNING AND SOCIAL GROWTH	3,500
MARTINSVILLEHENRY COUNTY COALITION FOR H 22 CHURCH STREET SUITE 211 MARTINSVILLE, VA 24115			GENERAL SUPPORT	4,000
MUSEUM OF CONTEMPORARY ART OF GEORGIA 75 BENNETT ST ATLANTA, GA 30308			GENERAL SUPPORT	1,000
Total . . . . ▶ **3a**				86,000

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
PHCC FOUNDATION PO BOX 5311 MARTINSVILLE, VA 24115			SCHOLARSHIPS	4,000
PIEDMONT VA DENTAL HEALTH FOUNDATION 407 STARLING AVE MARTINSVILLE, VA 24112			GENERAL SUPPORT	4,000
SPENCER PENN CENTRE 475 SPENCER PENN RD SPENCER, VA 24165			SUPPORT FOR SUMMER PROGRAM	4,000
STANLEYTOWN UNITED METHODIST CHURCH PO BOX 206 STANLEYTOWN, VA 24168			PARK MAINTENANCE AND GENERAL SUPPORT	11,500
STEP 200 DENT STREET ROCKY MOUNT, VA 24151			GENERAL SUPPORT	1,000
THE CONSERVATION FUND 1655 N FORT MYER DRIVE SUITE 1300 ARLINGTON, VA 22209			IN HONOR OF DICK LUDDINGTON	1,000
TREE OF LIFE PO BOX 1329 BLUE HILL, ME 04614			GENERAL SUPPORT	2,000
UNIVERSITIY OF GEORGIA FOUNDATION 270 RIVER RD ATHENS, GA 30602			LAMAR DODD SCHOOL OF ART GENERAL SUPPORT	1,000
WASHINGTON HANCOCK COMMUNITY AGENCY 248 BUCKSPORT RD ELLSWORTH, ME 04605			PENINSULA FREE HEALTH AGENCY	1,000
Total . . . . ▶ **3a**				86,000

TY 2016 Accounting Fees Schedule

Name: THE THOMAS B STANLEY JR AND
RUTH B STANLEY FAMILY FOUNDATION INC

EIN: 27-1437797

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	1,000	50	950	950

TY 2016 Investments Corporate Stock Schedule

Name: THE THOMAS B STANLEY JR AND
RUTH B STANLEY FAMILY FOUNDATION INC

EIN: 27-1437797

Name of Stock	End of Year Book Value	End of Year Fair Market Value
745 SHS ABBOTT LABORATORIES	23,457	28,615
409 SHS ABBVIE INC.	14,773	25,612
247 SHS ACCENTURE PLC	18,298	28,931
224 SHS ANTHEM INC.	20,007	32,204
132 SHS CVS HEALTH CORP	9,534	10,416
442 SHS DISCOVER FINANCIAL SVCS	25,663	31,864
309 SHS DUNKIN BRANDS GRP	13,003	16,204
877 SHS GENERAL MOTORS	26,066	30,555
293 SHS HONEYWELL INTL	29,677	33,944
1152 SHS HOST HOTELS & RESORTS	22,752	21,704
744 SHS INVESCO LTD	23,200	22,573
249 SHS JOHNSON & JOHNSON	24,829	28,687
592 SHS MAXIM INTEEGRATED PRODUCTS	16,867	22,833
116 SHS MCDONALDS	7,581	14,120
183 SHS MEAD JOHNSON NUTRITION CO	12,846	12,949
422 SHS MERCK & CO	22,046	24,843
289 SHS MICROSOFT CORP	7,206	17,958
285 SHS NOVARTIS AG	13,770	20,759
237 SHS OMNICOM GROUP	8,468	20,171
285 SHS PEPSICO	18,213	29,820
825 SHS PFIZER	16,643	26,796
1140 SHS PULTEGROUP	18,199	20,953
478 SHS QUALCOMM	29,641	31,166
550 SHS ROBERT HALF INTL	20,904	26,829
652 SABRE CORP	15,816	16,267
175 SHS SCOTTS MIRACLE-GRO	10,623	16,721
703 SHS SPECTRA ENERGY CORP	20,057	28,886
230 SHS TIME WARNER INC	14,032	22,202
592 SHS UNILEVER PLC	18,923	24,135
232 SHS UNITED PARCEL SERVICE	18,134	26,596

Name of Stock	End of Year Book Value	End of Year Fair Market Value
524 SHS VERIZON COMMUNICATIONS	24,534	27,971
544 SHS WELLS FARGO & CO	27,638	29,980
3000 SHS CAPITALA FINANCE CORP	50,149	38,790
2000 SHS CAPITALIA FINANCE CORP SR NOTE 7.125%	50,000	51,080
2000 SHS COLONY CAPITAL	50,230	50,520
1000 SHS COLONY CAPITAL SER B	24,992	24,680
2300 SHS FIRST TRUST INTERMEDIATE	50,093	52,187
2500 SHS GUGGENHEIM CREDIT ALLOC FD	59,930	55,850
1500 SHS HERCULES CAPITAL SR HOTE 6.25%	37,245	38,100
763 SHS HERCULES CAPITAL SR NOTE 7%	19,368	19,495
1500 SHS MONMOUTH REAL ESTATE INVT CORP	37,500	38,445
5000 SHS NUVEEN HI INC FD	50,000	49,400
1000 SHS PIMCO DYNAMIC CREDIT & MTG INC FD	25,000	20,220
1500 SHS SARATOGA INV CORP SR NOTE 7.5%	37,500	37,920
1500 SHS SARATOGA INV CORP NOTE 6.75%	37,500	38,775
2000 SHS STONECASTLE FINANCIAL CORP	38,931	37,380
1500 SHS THL CREDIT INC SR NOTE 6.75%	37,500	37,995
1000 SHS TRIANGLE CAP CORP SR NOTE 6.375%	25,286	25,400
1000 SHS TRIPLEPOINT VEN. GRWTH CORP NOTE 6.75%	25,000	25,500

TY 2016 Investments - Other Schedule

Name: THE THOMAS B STANLEY JR AND
RUTH B STANLEY FAMILY FOUNDATION INC

EIN: 27-1437797

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
1000 UNITS TEEKAY LNG PARTNERS LP	AT COST	24,970	23,480
15779.664 SHS JP MORGAN INC BUILDER	AT COST	150,061	157,639
13723.924 SHS LOOMIS SAYLES STRATEGIC INCOME	AT COST	153,917	193,782
15309.306 SHS LORD ABBETT HI YLD	AT COST	104,868	114,973

TY 2016 Other Decreases Schedule

Name: THE THOMAS B STANLEY JR AND
RUTH B STANLEY FAMILY FOUNDATION INC

EIN: 27-1437797

Description	Amount
UNREALIZED LOSS ON INVESTMENTS	41,417

TY 2016 Other Liabilities Schedule

Name: THE THOMAS B STANLEY JR AND
RUTH B STANLEY FAMILY FOUNDATION INC

EIN: 27-1437797

Description	Beginning of Year - Book Value	End of Year - Book Value
PAYROLL TAXES	1,120	1,030

TY 2016 Other Professional Fees Schedule

Name: THE THOMAS B STANLEY JR AND RUTH B STANLEY FAMILY FOUNDATION INC

EIN: 27-1437797

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BB&T MANAGEMENT FEES	7,903	7,903	0	0

TY 2016 Taxes Schedule

Name: THE THOMAS B STANLEY JR AND
RUTH B STANLEY FAMILY FOUNDATION INC

EIN: 27-1437797

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES PAID	116	116	0	0
PAYROLL TAXES	702	39	753	753
FEDERAL TAXES PAID	1,746	0	0	0