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Form **990-PF**

Return of Private Foundation

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

OMB No 1545-0052

2016Department of the Treasury
Internal Revenue Service

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

Open to Public Inspection

For calendar year 2016 or tax year beginning , and ending

Name of foundation THE MORRIS FAMILY FOUNDATION C/O JOHN A. MORRIS		A Employer identification number 58-1913577
Number and street (or P O box number if mail is not delivered to street address) 3016 VANDERBILT PLACE	Room/suite	B Telephone number (see instructions) 615-665-4448
City or town, state or province, country, and ZIP or foreign postal code NASHVILLE TN 37212		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input checked="" type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ 2,562,619	J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

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)
1	Contributions, gifts, grants, etc., received (attach schedule)				
2	Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments	28	28		
4	Dividends and interest from securities	46,354	46,354		
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	111,634			
b	Gross sales price for all assets on line 6a	1,244,870			
7	Capital gain net income (from Part IV, line 2)		111,634		
8	Net short-term capital gain		0		
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	158,016	158,016	0	
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) SEE STMT	2,950			
c	Other professional fees (attach schedule)				
17	Interest				
18	Taxes (attach schedule) (see instructions) STMT	171	171		
19	Depreciation (attach schedule) and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses (att sch) SEE STMT	30,580	22,269		
24	Total operating and administrative expenses. Add lines 13 through 23	33,701	22,440	0	0
25	Contributions, gifts, grants paid	127,500			127,500
26	Total expenses and disbursements. Add lines 24 and 25	161,201	22,440	0	127,500
27	Subtract line 26 from line 12				
a	Excess of revenue over expenses and disbursements	-3,185			
b	Net investment income (if negative, enter -0-)		135,576		
c	Adjusted net income (if negative, enter -0-)			0	

For Paperwork Reduction Act Notice, see instructions.

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Form 990-PF (2016)

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	233,600	78,342	78,343
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶ Less allowance for doubtful accounts ▶			
	4 Pledges receivable ▶ Less allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ Less allowance for doubtful accounts ▶	0		
	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) SEE STMT 4	1,972,292	2,123,505	2,484,276
	c Investments – corporate bonds (attach schedule)			
	11 Investments – land, buildings, and equipment basis ▶ Less accumulated depreciation (attach sch) ▶			
	12 Investments – mortgage loans			
	13 Investments – other (attach schedule)			
	14 Land, buildings, and equipment basis ▶ Less accumulated depreciation (attach sch) ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers – see the instructions Also, see page 1, item I)	2,205,892	2,201,847	2,562,619
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. ▶ <input type="checkbox"/>			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input checked="" type="checkbox"/>			
	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	2,205,892	2,201,847	
	30 Total net assets or fund balances (see instructions)	2,205,892	2,201,847	
	31 Total liabilities and net assets/fund balances (see instructions)	2,205,892	2,201,847	

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	2,205,892
2 Enter amount from Part I, line 27a	2	-3,185
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	2,202,707
5 Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 5	5	860
6 Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 30	6	2,201,847

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 ATTACHED		P	VARIOUS	VARIOUS
b SEE ATTACHED		P	VARIOUS	VARIOUS
c NATIONAL FINANCIAL SERVICES				
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 412,711		417,984	-5,273
b 821,011		715,252	105,759
c 11,148			11,148
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) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			-5,273
b			105,759
c			11,148
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	111,634
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 		3	

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year, see the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2015	134,019	2,600,871	0.051529
2014	109,895	2,260,428	0.048617
2013	96,200	2,026,987	0.047460
2012	89,000	1,791,671	0.049674
2011	99,327	1,889,580	0.052566

2 Total of line 1, column (d)	2	0.249846
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	0.049969
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	2,517,815
5 Multiply line 4 by line 3	5	125,813
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,356
7 Add lines 5 and 6	7	127,169
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions	8	127,500

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 <input type="checkbox"/> 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 <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	1,356
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b).		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3	Add lines 1 and 2	3	1,356
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	1,356
6	Credits/Payments		
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a	1,500
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	1,500
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	144
11	Enter the amount of line 10 to be: Credited to 2017 estimated tax 144 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?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the 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>		X
1c Did the foundation file Form 1120-POL for this year?		X
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>		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
4b If "Yes," has it filed a tax return on Form 990-T for this year?		
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>		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
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>	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) TN		
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>	X	
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>		X
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>		X

N/A

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)
- 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)
- 13** Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► **THEMORRISFAMILYFOUNDATION.ORG**

	Yes	No
11		X
12		X
13	X	

- 14** The books are in care of ► **JOHN A MORRIS**
870 TYNE BLVD

Telephone no ► **615-665-4448**Located at ► **NASHVILLE**

TN

ZIP+4 ► **37220**

- 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?

	Yes	No
16		X

See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

- 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)? **N/A**
- 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? **N/A**
- 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) **N/A**
- 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) **N/A**
- 4a** Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?
- 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?

	Yes	No
1b		
1c		
2b		
3b		
4a		X
4b		X

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions)

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No**b** If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

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?N/A ☐ 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

If "Yes" to 6b, file Form 8870.

X

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?

N/A

7b

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (if not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
JOHN A MORRIS 870 TYNE BLVD NASHVILLE TN 37220	TRUSTEE 2.00	0	0	0
ALFRED H MORRIS 159 LAMBERT ROAD NEW CANAAN CT 06840	TRUSTEE 2.00	0	0	0

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

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

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

0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)***3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE."**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

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 N/A	
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 N/A	
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	2,484,734
b	Average of monthly cash balances	1b	71,423
c	Fair market value of all other assets (see instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	2,556,157
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	2,556,157
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	38,342
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,517,815
6	Minimum investment return. Enter 5% of line 5	6	125,891

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	125,891
2a	Tax on investment income for 2016 from Part VI, line 5	2a	1,356
b	Income tax for 2016 (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	1,356
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	124,535
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	124,535
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	124,535

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes	1a	127,500
a	Expenses, contributions, gifts, etc. – total from Part I, column (d), line 26	1b	
b	Program-related investments – total from Part IX-B		
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	127,500
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)	5	1,356
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	126,144

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				124,535
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2016				
a From 2011	6,194			
b From 2012	1,393			
c From 2013				
d From 2014	1,084			
e From 2015	6,937			
f Total of lines 3a through e	15,608			
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ 127,500				
a Applied to 2015, but not more than line 2a				
b Applied to undistributed income of prior years (Election required – see instructions)				
c Treated as distributions out of corpus (Election required – see instructions)				
d Applied to 2016 distributable amount				124,535
e Remaining amount distributed out of corpus	2,965			
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	18,573			
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount – see instructions				
e Undistributed income for 2015 Subtract line 4a from line 2a Taxable amount – see instructions				
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)	6,194			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	12,379			
10 Analysis of line 9				
a Excess from 2012	1,393			
b Excess from 2013				
c Excess from 2014	1,084			
d Excess from 2015	6,937			
e Excess from 2016	2,965			

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 foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year				(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 foundation had \$5,000 or more in assets at any time during the year – see instructions.)

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2).)
N/A

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
N/A

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed.
BRENDA HARDISON 615-665-4448
3016 VANDERBILT PLACE NASHVILLE TN 37212

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

c Any submission deadlines:
NOVEMBER 1

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors
AWARDS ARE LIMITED TO 501(C)(3) ORGANIZATIONS ONLY

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year SEE STATEMENT 7				127,500
Total			▶ 3a	127,500
b Approved for future payment N/A				
Total			▶ 3b	

Federal Statements

Statement 1 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
INDIRECT ACCOUNTING FEES	\$ 2,950	\$	\$	\$
TOTAL	\$ 2,950	\$ 0	\$ 0	\$ 0

Statement 2 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
FOREIGN TAX	\$ 171	\$ 171	\$	\$
TOTAL	\$ 171	\$ 171	\$ 0	\$ 0

Statement 3 - Form 990-PF, Part I, Line 23 - Other Expenses

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
EXPENSES	\$	\$	\$	\$
BANK CHARGES	100			
INVESTMENT FEES	22,269	22,269		
WEBSITE	8,211			
TOTAL	\$ 30,580	\$ 22,269	\$ 0	\$ 0

Statement 4 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
357 SH COSTCO WHOLESALE CORP	\$ 35,847	\$	COST	\$
116 SH AETNA INC NEW COM	11,009		COST	
35 SH AFFILIATED MANAGERS GROUP	7,538		COST	
165 SH ALLEGION PLC COM US	10,007		COST	
79 SH ALPHABET INC CAP STK CL A	33,714		COST	
99 SH AMAZON.COM INC	42,023		COST	
477 SH APPLE INC	33,459		COST	

Federal Statements

Statement 4 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments (continued)

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
110 SH ASHLAND INC NEW	\$ 8,488		COST	\$
94 SH BIOGEN INC COM	19,798		COST	
336 SH BOEING CO	40,832		COST	
550 SH BOSTON SCIENTIFIC CORP	9,584		COST	
735 SH BRISTOL MYERS SQUIBB	34,593		COST	
228 SH CALLIDUS SOFTWARE INC COM	4,519		COST	
557 SH CMS ENERGY CORP	15,540		COST	
945 SH COGNIZANT TECH SOLUTIONS CORP	49,949		COST	
1,155 SH COMCAST CORP NEW CL A	63,970		COST	
185 SH DELPHI AUTOMOTIVE PLC COM US	11,254		COST	
197 SH DIAMOND FOODS INC COM	6,018		COST	
59 SH DIAMONDBACK ENERGY INC COM US	4,527		COST	
230 SH DISNEY WALT CO	25,557		COST	
688 SH FACEBOOK INC COM	48,698		COST	
260 SH GILEAD SCIENCES INC	15,489		COST	
195 SH HARTFORD FINL SVCS GROUP INC	7,134		COST	
641 SH HCA HLDGS INC COM US	40,462		COST	
556 SH HD SUPPLY HLDGS INC COM	16,014		COST	
207 SH HEALTH NET INC COM	5,576		COST	
3,385 SH KEYCORP NEW	44,273		COST	
221 SH LAM RESEARCH CORP	12,559		COST	
90 SH LITHIA MOTORS INC CL A	8,010		COST	
386 SH LOWES COS INC COM	15,390		COST	
533 SH MARATHON PETROLEUM CORP	24,479		COST	
1,146 SH MICROSOFT CORP	46,665		COST	
173 SH MOLSON COORS BREWING CO CL B	12,865		COST	
1,107 SH MONDELEZ INTL INC COM	43,268		COST	
201 SH MSCI INC COM	12,158		COST	
1,003 SH NASDAQ INC COM STK	43,060		COST	
286 SH O REILLY AUTOMOTIVE INC NEW C	27,841		COST	
141 SH PG & E CORP	7,125		COST	
289 SH PROCTOR & GAMBLE CO	25,673		COST	
336 SH PROFFPOINT INC COM	11,925		COST	
388 SH RED HAT INC COM	26,397		COST	
1,367 SH SCHWAB CHARLES CORP NEW	39,470		COST	
179 SH SEALED AIR CORP NEW	6,494		COST	
87 SH SIRONA DENTAL SYSTEMS INC COM	7,334		COST	
460 SH STRYKER CORP	44,171		COST	
36 SH TABLEAU SOFTWARE INC COM	4,050		COST	

Federal Statements

Statement 4 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments (continued)

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
	\$	\$		\$
463 SH TEAM HEALTH HOLDINGS INC COM	17,093		COST	
320 SH TRACTOR SUPPLY CO	28,025		COST	
129 SH TRANSDIGM GROUP INC COM	25,499		COST	
230 SH UNION PACIFIC CORP	17,924		COST	
260 SH VALERO ENERGY CORP	16,795		COST	
364 SH ZIONS BANCORP	10,294		COST	
974.725 SH INVESCO CONVERTIBLE SECUR	22,662		COST	
2,989.756 SH BLACKROCK HIGH YIELD	22,662		COST	
4,143.025 SH DOUBLELINE TOTAL RETURN	45,325		COST	
1,066.966 SH FIRST TRUST PREFERD SEC	22,662		COST	
413 SH ISHARES MSCI EAFE ETF	25,180		COST	
273 SH ISHARES S&P SMALLCAP 600 VALU	30,118		COST	
437 SH ISHARES US TELECOMMUNICATION	13,252		COST	
133 SH POWERSHARES EXCHANGE TRADED F	5,206		COST	
4,712 SH VANGUARD INDEX FDS VANGUARD	496,722		COST	
667 SH WISDOMTREE TR EUROPE HEDGED E	43,513		COST	
411 SH HUDSON PAC PPTYS INC COM	12,278		COST	
271 SH SIMON PPTY GRP INC	52,276		COST	
42 SH ALPHABET INC		31,456	COST	33,283
123 SH AMAZON.COM INC		60,430	COST	92,234
239 SH APPLE INC		18,476	COST	27,681
598 SH AT&T INC COM		23,342	COST	25,433
939 SH BB&T CORP		39,898	COST	44,152
550 SH BOSTON SCIENTIFIC CORP		9,584	COST	11,897
1,155 SH COMCAST CORP NEW		63,970	COST	79,753
363 SH CONCHO RES INC		44,933	COST	48,134
95 SH COPART INC COM		4,061	COST	5,264
357 SH COSTCO WHOLESALE CORP		35,847	COST	57,159
94 SH DIAMONDBACK ENERGY INC		7,464	COST	9,500
662 DOW CHEMICAL CO		35,951	COST	37,880
58 SH EQUIFAX INC		5,415	COST	6,857
344 SH FACEBOOK INC COM		25,447	COST	39,577
84 SH FAIR ISAAC CORP COM		8,064	COST	10,014
1,238 SH GENERAL ELECTRIC CO		37,537	COST	39,121
1,437 SH INTEL CORP		51,600	COST	52,120
674 SH JPMORGAN CHASE & CO		53,610	COST	58,159
102 SH LAM RESEARCH CORP		6,114	COST	10,784
386 SH LOWES COS INC COM		15,390	COST	27,452
1,146 SH MICROSOFT CORP		46,665	COST	71,212

Federal Statements

Statement 4 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments (continued)

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
173 SH MOLSON COORS BREWING CO	\$	12,865	COST	\$ 16,835
154 SH MSCI INC COM		9,167	COST	12,132
1,003 SH NASDAQ INC COM		43,060	COST	67,321
164 SH NEXTERA ENERGY INC COM		19,318	COST	19,591
286 SH O REILLY AUTOMOTIVE INC NEW		27,841	COST	79,625
86 SH PG&E CORP		4,429	COST	5,226
247 SH PIONEER NATURAL RESOURCES CO		39,552	COST	44,477
757 SH PROCTER AND GAMBLE CO COM		63,655	COST	63,649
388 SH RED HAT INC COM		26,397	COST	27,044
271 SH SIMON PPTY GRP INC		52,276	COST	48,149
425 SH STARBUCKS CORP COM		24,928	COST	23,596
460 SH STRYKER CORP		44,171	COST	55,113
415 SH SYSCO CORP		19,173	COST	22,979
219 SH TRANSDIGM GROUP INC COM		48,464	COST	54,522
445 SH UNION PACIFIC CORP		44,672	COST	46,138
435 SH UNITED STATES STEEL CORP		7,128	COST	14,359
313 SH UNITEDHEALTH GROUP		44,462	COST	50,093
260 SH VALERO ENERGY CORP		16,795	COST	17,763
111 SH 3M COMPANY		18,276	COST	19,821
1,015.66 SH AMERICAN MUTUAL FUND		34,583	COST	37,397
3,549.982 SH AMERICAN WASHINGTON MUT		130,533	COST	145,265
3,646.285 SH EATON VANCE ATLANTA CAP		101,950	COST	101,549
108 SH FIRST TR EXCHANGE TRADED FD		3,824	COST	3,834
193 SH FIRST TR EXCHANGE TRADED FD		8,926	COST	8,830
892 SH FIRST TR EXCHANGE TRADED FD		21,682	COST	24,111
474 SH FIRST TR EXCHANGE TRADED FD		14,041	COST	15,585
413 SH FIRST TR EXCHANGE TRADED FD		14,026	COST	14,798
437 SH ISHARES US TELECOMMUNICATION		13,252	COST	15,077
159 SH POWERSHARES EXCHANGE TRADED		8,698	COST	11,074
103 SH POWERSHARES EXCHANGE TRADED		7,617	COST	7,524
4,712 SH VANGUARD INDEX FDS VANGUARD		496,722	COST	543,388
1,805 SH VANGUARD INTL EQUITY INDEX		75,768	COST	79,745
TOTAL	\$ 1,972,292	\$ 2,123,505		\$ 2,484,276

Statement 5 - Form 990-PF, Part III, Line 5 - Other Decreases

Description	Amount
INCOME TAX	\$ 860
TOTAL	\$ 860

Statement 6 - Form 990-PF, Part XV, Line 2b - Application Format and Required Contents**Description**

DETAILS REGARDING THE APPLICATION PROCESS AND ANY
INFORMATION THAT SHOULD BE INCLUDED CAN BE FOUND ONLINE AT
THEMORRISFAMILYFOUNDATION.ORG

Form 990-PF, Part XV, Line 2c - Submission Deadlines**Description**

NOVEMBER 1

Form 990-PF, Part XV, Line 2d - Award Restrictions or Limitations**Description**

AWARDS ARE LIMITED TO 501(C)(3) ORGANIZATIONS ONLY

Federal Statements

Statement 7 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the
Year

Name	Address	Relationship	Status	Purpose	Amount
AMERICAN CANCER SOCIETY	ATLANTA GA 30303	NONE	250 WILLIAMS ST NW	PUB. CHARITY DONATION	1,000
AMERICAN FOUNDATION FOR THE COURTLA	NEW YORK NY 10028	NONE	55 EAST END AVENUE #3D	PUB. CHARITY DONATION	6,000
AMERICAN SOCIETY FOR THE PREVENTION	NEW YORK NY 10128-6804	NONE	424 E. 92ND STREET	PUB. CHARITY DONATION	325
AMERICAN THEATRE WING	NEW YORK NY 10036	NONE	230 WEST 41ST STREET	PUB. CHARITY DONATION	3,000
BALLET COLLECTIVE INC.	NEW YORK NY 10025	NONE	915 WEST END AVE APT 6D	PUB. CHARITY DONATION	2,000
BRICK PRES. CHURCH	NEW YORK NY 10128	NONE	62 E 92ND ST	PUB. CHARITY DONATION	500
BUCKLEY SCHOOL ANNUAL FUN	NEW YORK NY 10021	NONE	113 EAST 73RD STREET	PUB. CHARITY DONATION	1,000
CARNEGIE HILL NEIGHBORS INC.	NEW YORK NY 10128	NONE	170 E 91ST STREET	PUB. CHARITY DONATION	150
ENSEMBLE STUDIO THEATRE	NEW YORK NY 10019	NONE	549 W 52ND STREET	PUB. CHARITY DONATION	500
FORDHAM UNIVERSITY	BRONX NY 10458	NONE	441 EAST FORDHAM ROAD	PUB. CHARITY DONATION	3,000
ITALIAN GREYHOUND RESCUE	NORTH READING MA 01864	NONE	7 DAMON STREET	PUB. CHARITY DONATION	750
MUSEUM OF THE CITY OF NEW YORK	NEW-YORK NY 10029	NONE	1220 5TH AVENUE	PUB. CHARITY DONATION	3,200
NATIONAL MUSEUM OF RACING	SARATOGA SPRINGS NY 12866	NONE	191 UNION AVENUE	PUB. CHARITY DONATION	500
NEW CANAAN BEAUTIFICATION LEAGUE	NEW CANAAN CT 06840	NONE	P.O. BOX 4	PUB. CHARITY DONATION	250
NEW CANAAN LAND TRUST INC.	NEW CANAAN CT 06840	NONE	P.O. BOX 425	PUB. CHARITY DONATION	500
NEW CANAAN PRESERVATION ALLIANCE	NEW CANAAN CT 06840	NONE	P.O. BOX 924	PUB. CHARITY DONATION	500
NY PHILHARMONIC	NEW YORK NY 10023	NONE	10 LINCOLN CENTER PLAZA	PUB. CHARITY DONATION	4,600
ST GEORGE'S ANNUAL FUND	MIDDLETOWN RI 02842	NONE	372 PURGATORY ROAD	PUB. CHARITY DONATION	2,000
STAYING PUT IN NEW CANAAN	NEW CANAAN CT 06840	NONE	P.O. BOX 484	PUB. CHARITY DONATION	500

Federal Statements

Statement 7 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the
Year (continued)

Name		Address		Relationship	Status	Purpose	Amount
Address							
THE FUND FOR PARK AVENUE		445 PARK AVENUE					
NEW YORK NY 10022	NONE	PUB. CHARITY	DONATION				250
THE HORTICULTURAL SOCIETY OF NY		148 WEST 37TH STREET					
NEW YORK NY 10018-6909	NONE	PUB. CHARITY	DONATION				225
THE NEW YORK TIMES NEEDIEST CASES F		4 CHASE METROTECH CENTER					
BROOKLYN NY 11245	NONE	PUB. CHARIT	DONATION				1,870
THE VERSAILLES FOUNDATION		420 LEXINGTON AVENUE					
NEW YORK NY 10170	NONE	PUB. CHARITY	DONATION				1,300
TRUSTEES OF COLUMBIA UNIV		622 W. 113TH STREET					
NEW YORK NY 10025	NONE	PUB. CHARITY	DONATION				3,000
TRUSTEES OF TUFTS COLLEGE		169 HOLLAND STREET #3					
SOMERVILLE MA 02144	NONE	PUB. CHARITY	DONATION				1,500
WILDLIFE IN CRISIS		P.O. BOX 1246					
WESTON CT 06883	NONE	PUB. CHARITY	DONATION				1,000
WSHU PUBLIC RADIO GROUP		5151 PARK AVENUE					
FAIRFIELD CT 06825	NONE	PUB. CHARITY	DONATION				250
NEW CANAAN NATURE CENTER ASSOC		144 OENOKE RDG					
NEW CANAAN CT 06840	NONE	PUB. CHARITY	DONATION				250
THE SOCIETY OF MSK		1275 YORK AVENUE					
NEW YORK NY 10065	NONE	PUB. CHARITY	DONATION				4,200
BRUCE MUSEUM, INC.		ONE MUSEUM DR					
GREENWICH CT 06830	NONE	PUB. CHARITY	DONATION				680
BLUE STAR FAMILIES		PO BOX 230637					
ENCINITAS CA 92023	NONE	PUB. CHARITY	DONATION				250
ECAD		149 NEWFIELD RD					
TORRINGTON CT 06790	NONE	PUB. CHARITY	DONATION				500
THE QUEEN ELIZABETH II SEPTEMBER 11		11 HANOVER SQ FL 12					
NEW YORK NY 10005	NONE	PUB. CHARITY	DONATION				250
TISCH MS RESEARCH CENTER OF NY		521 WEST 57TH STREET					
NEW YORK NY 10019	NONE	PUB. CHARITY	DONATION				250
INTERNATIONAL YOUTH INTERNSHIP PROG		125 SUSSEX DRIVE					
OTTAWA ON K1A 0G2	NONE	PUB. CHARITY	DONATION				3,000
EAST SIDE SETTLEMENT HOUSE		337 ALEXANDER AVE					
BRONX NY 10454	NONE	PUB. CHARITY	DONATION				850
92ND STREET Y		1395 LEXINGTON AVE					
NEW YORK NY 10128	NONE	PUB. CHARITY	DONATION				100

Federal Statements

Statement 7 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the
Year (continued)

Name		Address		Relationship	Status	Purpose	Amount
Address							
THE ANIMAL MEDICAL CENTER NEW YORK NY 10065		510 E 62ND ST	PUB. CHARITY DONATION	NONE			250
GIRL SCOUTS OF GREATER NY NEW YORK NY 10005		40 WALL STREET, SUITE 708	PUB. CHARITY DONATION	NONE			2,500
THE DREAM TEAM OF MSKCC NEW YORK NY 10065		1275 YORK AVENUE	PUB. CHARITY DONATION	NONE			10,000
ROUNDAABOUT THEATRE COMPANY INC NEW YORK NY 10018		231 W 39TH ST STE 1200	PUB. CHARITY DONATION	NONE			1,000
IDEAS DECATUR GA 30032		1702 DANCING FOX ROAD	PUB. CHARITY DONATION	NONE			15,000
LWALA COMMUNITY ALLIANCE, INC. NASHVILLE TN 37206		P.O. BOX 60688	PUB. CHARITY DONATION	NONE			17,500
GLOBAL MOBILITY VAN NUYS CA 91405		7536 TYRONE AVE	PUB. CHARITY DONATION	NONE			10,250
TREK MEDICS INTERNATIONAL INC NEW YORK NY 10012		193-195 BLEECKER ST	PUB. CHARITY DONATION	NONE			15,000
DEVELOPMENT SERVICES OF NORTHWEST HAYS KS 67601		P.O. BOX 310	PUB. CHARITY DONATION	NONE			6,000
TOTAL							127,500