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2017 HURRICANE IRMA
Return of Private Foundation
 or Section 4947(a)(1) Trust Treated as Private Foundation

OMB No 1545-0052

Form **990-PF****2016**Department 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 INDIA BENTON LESSER FOUNDATION C/O SUN TRUST		A Employer identification number 58-2436064
Number and street (or P O box number if mail is not delivered to street address) PO BOX 2138 MC 3701	Room/suite	B Telephone number (see instructions) 941-587-3684
City or town, state or province, country, and ZIP or foreign postal code SARASOTA FL 34230		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <div style="display: flex; justify-content: space-between;"> <div> <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change </div> <div> <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change </div> </div>		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) ▶ \$ 216,692	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)
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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	9		
4	Dividends and interest from securities	2,470	2,470	2,470
5a	Gross rents			
b	Net rental income or (loss)			
6a	Net gain or (loss) from sale of assets not on line 10 STMT 2	106,735		
b	Gross sales price for all assets on line 6a 335,608			
7	Capital gain net income (from Part IV, line 2)		598	
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) STMT 3	12	12	12
12	Total. Add lines 1 through 11	109,226	3,089	2,491
13	Compensation of officers, directors, trustees, etc	0		
14	Other employee salaries and wages			
15	Pension plans, employee benefits			
16a	Legal fees (attach schedule) SEE STMT 4	1,799	900	899
b	Accounting fees (attach schedule) STMT 5	2,650		2,650
c	Other professional fees (attach schedule) STMT 6	3,104	1,552	1,552
17	Interest			
18	Taxes (attach schedule) (see instructions) STMT 7	76	46	30
19	Depreciation (attach schedule) and depletion			
20	Occupancy			
21	Travel, conferences, and meetings			
22	Printing and publications			
23	Other expenses (att sch) STMT 8	9,301		
24	Total operating and administrative expenses. Add lines 13 through 23	16,930	2,498	0
25	Contributions, gifts, grants paid	144,532		144,532
26	Total expenses and disbursements. Add lines 24 and 25	161,462	2,498	0
27	Subtract line 26 from line 12	-52,236		
a	Excess of revenue over expenses and disbursements		591	
b	Net investment income (if negative, enter -0-)			
c	Adjusted net income (if negative, enter -0-)			2,491

For Paperwork Reduction Act Notice, see instructions.

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			4,877	11,967	11,967
	2	Savings and temporary cash investments			16,523	69,902	69,902
	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 (att schedule) ▶					
		Less allowance for doubtful accounts ▶	0				
	8	Inventories for sale or use					
	9	Prepaid expenses and deferred charges			1,108	16,032	16,032
	10a	Investments – U S and state government obligations (attach schedule)					
	b	Investments – corporate stock (attach schedule) SEE STMT 9			184,334	76,467	83,269
	c	Investments – corporate bonds (attach schedule) SEE STMT 10			42,302	31,369	30,912
	11	Investments – land, buildings, and equipment basis ▶					
	Less accumulated depreciation (attach sch) ▶						
12	Investments – mortgage loans						
13	Investments – other (attach schedule) SEE STATEMENT 11				4,610	4,610	
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)			249,144	210,347	216,692	
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 ▶) SEE STATEMENT 12)				13,439	
	23	Total liabilities (add lines 17 through 22)			0	13,439	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ▶ <input checked="" type="checkbox"/>					
	24	Unrestricted			249,144	196,908	
	25	Temporarily restricted					
	26	Permanently restricted					
		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input 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					
	30	Total net assets or fund balances (see instructions)			249,144	196,908	
	31	Total liabilities and net assets/fund balances (see instructions)			249,144	210,347	

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	249,144
2	Enter amount from Part I, line 27a	2	-52,236
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	196,908
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	196,908

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 SUNTRUST				
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 598			598	
b				
c				
d				
e				
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		
a			598	
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	598
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	114,381	273,664	0.417961
2014	148,843	339,191	0.438818
2013	79,536	360,461	0.220651
2012	45,958	305,196	0.150585
2011	82,565	310,022	0.266320

2 Total of line 1, column (d)**2** 1.494335**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** 0.298867**4** Enter the net value of noncharitable-use assets for 2016 from Part X, line 5**4** 173,927**5** Multiply line 4 by line 3**5** 51,981**6** Enter 1% of net investment income (1% of Part I, line 27b)**6** 6**7** Add lines 5 and 6**7** 51,987**8** Enter qualifying distributions from Part XII, line 4**8** 149,663

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 <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	6
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	6
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	6
6	Credits/Payments		
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a	847
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	847
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	841
11	Enter the amount of line 10 to be Credited to 2017 estimated tax 841 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
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)? If the answer is "Yes" to 1a or 1b , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c 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? If "Yes," attach a detailed description of the activities		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? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b 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? If "Yes," attach the statement required by General Instruction T		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? If "Yes," complete Part II, col (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) NONE		
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	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)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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	X
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	X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► THELESSERFOUNDATION.ORG	13	X
14 The books are in care of ► INDIA BENTON LESSER 1862 WOOD VALLEY ROAD Located at ► MACON GA ZIP+4 ► 31211 Telephone no ► 941-587-3684		
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? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►	16	X

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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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)?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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.)	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A	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?	N/A	1c
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? If "Yes," list the years ► 20 , 20 , 20 , 20	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
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	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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		X
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	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))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)? Organizations relying on a current notice regarding disaster assistance check here	N/A <input type="checkbox"/>	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? If "Yes," attach the statement required by Regulations section 53.4945–5(d)	N/A <input type="checkbox"/> Yes <input type="checkbox"/> No		
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870		6b	X
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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
SEE STATEMENT 13				

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	
3 All other program-related investments See instructions	

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	125,016
b	Average of monthly cash balances	1b	51,560
c	Fair market value of all other assets (see instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	176,576
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	176,576
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	2,649
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	173,927
6	Minimum investment return. Enter 5% of line 5	6	8,696

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	8,696
2a	Tax on investment income for 2016 from Part VI, line 5	2a	6
b	Income tax for 2016 (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	6
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	8,690
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	8,690
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	8,690

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	149,663
b	Program-related investments – total from Part IX-B	1b	
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	149,663
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
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	149,657

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				8,690
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	70,332			
b From 2012	32,575			
c From 2013	63,238			
d From 2014	133,547			
e From 2015	100,890			
f Total of lines 3a through e	400,582			
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ 149,663				
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				8,690
e Remaining amount distributed out of corpus	140,973			
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:	541,555			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
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)	70,332			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	471,223			
10 Analysis of line 9				
a Excess from 2012	32,575			
b Excess from 2013	63,238			
c Excess from 2014	133,547			
d Excess from 2015	100,890			
e Excess from 2016	140,973			

Form **990-PF** (2016)

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 14				144,532
Total			▶ 3a	144,532
b Approved for future payment N/A				
Total			▶ 3b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue					
a						
b						
c						
d						
e						
f						
g	Fees and contracts from government agencies					
2	Membership dues and assessments					
3	Interest on savings and temporary cash investments			14	9	
4	Dividends and interest from securities			14	2,470	
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			25	12	
8	Gain or (loss) from sales of assets other than inventory			18	106,137	598
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue a					
b						
c						
d						
e						
12	Subtotal. Add columns (b), (d), and (e)		0		108,628	598
13	Total. Add line 12, columns (b), (d), and (e)				13	109,226

(See worksheet in line 13 instructions to verify calculations)

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

[illegible]

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

- 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
 - (2) Other assets
 - b Other transactions
 - (1) Sales of assets to a noncharitable exempt organization
 - (2) Purchases of assets from a noncharitable exempt organization
 - (3) Rental of facilities, equipment, or other assets
 - (4) Reimbursement arrangements
 - (5) Loans or loan guarantees
 - (6) Performance of services or membership or fundraising solicitations
 - c Sharing of facilities, equipment, mailing lists, other assets, or paid employees
 - d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.

	Yes	No
1a(1)		X
1a(2)		X
1b(1)		X
1b(2)		X
1b(3)		X
1b(4)		X
1b(5)		X
1b(6)		X
1c		X

[illegible]

- 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
N/A		

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.

**Sign
Here**

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

Signature of officer or trustee

Date: _____

Title

TRUSTEE

Paid
Preparer
Use Only

Print/Type preparer's name

Preparer's signature

Date _____

Check ☐ if self-employed

BRENT J. MYERS, CPA

10/19/17

Firm's name ► **MYERS & COMPANY**

PTIN P00327240

Firm's address ► 3333 CLARK RD STE 100
SARASOTA, FL 34231-8437

Firm's EIN ▶ 20-0396831

Phone no **941-923-4085**

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Statement 2 - Form 990-PF, Part I, Line 6a - Sale of Assets

Description	Whom Sold	Date Acquired	Date Sold	How Received		Cost	Expense	Depreciation	Net Gain / Loss
				Sale Price	PURCHASE				
351 SHS CHEVRON CORP		1/09/04	12/15/16	\$ 40,559	PURCHASE	7,534	\$	\$	33,025
442 SHS EXXON MOBIL CORP		1/09/04	12/15/16	39,843	PURCHASE	8,503			31,340
SUNTRUST S/T NONCOVERED			12/31/16	86,256	PURCHASE	86,057	125		74
SUNTRUST L/T NONCOVERED			12/31/16	95,023	PURCHASE	93,342	119		1,562
950 SHS EXXON MOBIL CORP		1/01/03	1/19/16	73,329	PURCHASE	33,193			40,136
TOTAL				\$ 335,010		228,629	\$ 244	\$ 0	\$ 106,137

Statement 3 - Form 990-PF, Part I, Line 11 - Other Income

Description	Revenue per Books	Net Investment Income	Adjusted Net Income
OTHER INCOME	\$ 12	\$ 12	\$ 12
TOTAL	\$ 12	\$ 12	\$ 12

Statement 4 - Form 990-PF, Part I, Line 16a - Legal Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
INDIRECT LEGAL FEES	\$ 1,799	\$ 900	\$	\$ 899
TOTAL	\$ 1,799	\$ 900	\$ 0	\$ 899

Statement 5 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
TAX PREPARATION	\$ 2,650	\$	\$	\$ 2,650
TOTAL	\$ 2,650	\$ 0	\$ 0	\$ 2,650

Statement 6 - Form 990-PF, Part I, Line 16c - Other Professional Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
SUNTRUST ADVISORY FEES	\$ 3,104	\$ 1,552	\$	\$ 1,552
TOTAL	\$ 3,104	\$ 1,552	\$ 0	\$ 1,552

Statement 7 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
FOREIGN TAXES	\$ 46	\$ 46	\$	\$ 30
GA ANNUAL REGISTRATION	30			
TOTAL	\$ 76	\$ 46	\$ 0	\$ 30

Statement 8 - Form 990-PF, Part I, Line 23 - Other Expenses

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
EXPENSES		\$	\$	
ANNUAL MEETING EXP	9,301			
TOTAL	\$ 9,301	\$ 0	\$ 0	\$ 0

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Statement 9 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
SUNTRUST-CORPORATE STOCK	\$ 168,492	\$ 66,803	COST	\$ 73,631
SUNTRUST-CORPORATE FUNDS	15,842	9,664	COST	9,638
TOTAL	\$ 184,334	\$ 76,467		\$ 83,269

Statement 10 - Form 990-PF, Part II, Line 10c - Corporate Bond Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
SUNTRUST- BONDS	\$ 42,302	\$ 31,369	COST	\$ 30,912
TOTAL	\$ 42,302	\$ 31,369		\$ 30,912

Statement 11 - Form 990-PF, Part II, Line 13 - Other Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
SUNTRUST PWM FIDUCIARY	\$	\$ 4,610	COST	\$ 4,610
TOTAL	\$ 0	\$ 4,610		\$ 4,610

Statement 12 - Form 990-PF, Part II, Line 22 - Other Liabilities

<u>Description</u>	<u>Beginning of Year</u>	<u>End of Year</u>
DUE TO AMEX	\$	\$ 12,140
DUE TO TTEE		1,299
TOTAL	\$ 0	\$ 13,439

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Statement 13 - Form 990-PF, Part VIII, Line 1 - List of Officers, Directors, Trustees, Etc.

Name and Address	Title	Average Hours	Compensation	Benefits	Expenses
INDIA BENTON LESSER 1862 WOOD VALLEY ROAD MACON GA 31211	TRUSTEE	5.00	0	0	0
BRUCE W. LESSER 1862 WOOD VALLEY ROAD MACON GA 31211	TRUSTEE	5.00	0	0	0
STEVE LESSER 3304 TIMBERFIELD LANE BALTIMORE MD 21208	TRUSTEE	5.00	0	0	0
RUTH M. SMITH 504 HIGH POINT NORTH ROAD MACON GA 31210	TRUSTEE	5.00	0	0	0
DIANE WALTON 1249 CHISOLM TRAIL MACON GA 31210	TRUSTEE	5.00	0	0	0
RACHEL STOKES 653 CAPTAIN KELL DRIVE MACON GA 31204	TRUSTEE	5.00	0	0	0

Form 990-PF, Part XV, Line 1a - Managers Who Contributed Over 2% or \$5,000

Name of Manager	Amount
NONE	\$
TOTAL	\$ 0

Form 990-PF, Part XV, Line 1b - Managers Who Own 10% or More Stock

Name of Manager	Amount
NONE	\$
TOTAL	\$ 0

Form 990-PF, Part XV, Line 2b - Application Format and Required Contents

Description
WRITTEN REQUEST INDICATING NEED FOR AID AND ASSISTANCE.

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

Description
NONE

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

Description
NONE

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Statement 14 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year

Name		Address		Status	Purpose	Amount
Address	Relationship					
SPECIAL OLYMPICS ATHLETE BOOSTER WASHINGTON DC 20036	1133 19TH ST NW	501(C) (3)	GENERAL			1,600
PETS ON WHEELS BALTIMORE MD 21236	PO BOX 44176	501(C) (3)	GENERAL			500
UNIV OF GA ATHLETIC ASSOCIATION ATHENS GA 30602	1 SELIG CIRCLE	501(C) (3)	GENERAL			2,500
ASOLO THEATRE SARASOTA FL 34243	5555 N TAMiami TRAIL	501(C) (3)	GENERAL			5,000
ANIMAL RESCUE COALITION SARASOTA FL 34240	6320 TOWER LANE	501(C) (3)	GENERAL			8,500
HYUNDAI TOURNAMENT OF CHAMPIONS FOUNTAIN VALLEY CA 92728	PO BOX 20850	501(C) (3)	GENERAL			2,988
LANDINGS MILITARY FAMILY RELIEF FD SAVANNAH GA 31411	6 RAMSHORN CT	501(C) (3)	GENERAL			50
DAVIS LOVE FOUNDATION ST SIMONS ISLAND GA 31522	100 RETREAT AVE	501(C) (3)	GENERAL			7,000
SARASOTA CHRISTIAN SCHOOL SARASOTA FL 34232	5415 BAHIA VISTA ST	501(C) (3)	GENERAL			650
ANIMAL RESCUE COALITION SARASOTA FL 34240	6320 TOWER LANE	501(C) (3)	GENERAL			5,500
AMERICAN CANCER SOCIETY OKLAHOMA CITY OK 73123	PO BOX 22718	501(C) (3)	GENERAL			10,000
ASOLO THEATRE SARASOTA FL 34243	5555 N TAMiami TRAIL	501(C) (3)	GENERAL			600
CHILDREN FIRST SARASOTA FL 34242	1723 N ORANGE AVE	501(C) (3)	GENERAL			1,250
BRIAN BILL FOUNDATION SARASOTA FL 34236	1680 FRUITVILLE RD	501(C) (3)	GENERAL			7,300
SARASOTA MEMORIAL HEALTHCARE FOUNDA	1515 S OSPREY AVE #4	501(C) (3)	GENERAL			2,490
YMCA OF SARASOTA COUNTY SARASOTA FL 34237	1 S SCHOOL AVE #301	501(C) (3)	GENERAL			700
CHILDREN FIRST SARASOTA FL 34242	1723 N ORANGE AVE	501(C) (3)	GENERAL			3,540

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Statement 14 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the

Year (continued)

Name	Address	Relationship	Status	Purpose	Amount
HYUNDAI PGA FOUNDATION	FOUNTAIN VALLEY CA 92728	PO BOX 20850	501(C)(3)	GENERAL	4,000
TOURNAMENT FOR CHARITY	FOUNTAIN VALLEY CA 92728	PO BOX 20850	501(C)(3)	GENERAL	5,100
CMN HOSPITALS FOUNDATION	SALT LAKE CITY UT 84101	205 WEST 700 SOUTH	501(C)(3)	GENERAL	1,752
ACH FOUNDATION	SARASOTA FL 34238	5881 RAND BLVD	501(C)(3)	GENERAL	200
YMCA OF SARASOTA COUNTY	SARASOTA FL 34237	1 S SCHOOL AVE #301	501(C)(3)	GENERAL	950
SARASOTA MEMORIAL HEALTHCARE FOUNDA	SARASOTA FL 34239	1515 S OSPREY AVE #4	501(C)(3)	GENERAL	850
MT WASHINGTON PEDIATRIC HOSP	BALTIMORE MD 21209	1708 W ROGERS AVE	501(C)(3)	GENERAL	200
PETS ON WHEELS	BALTIMORE MD 21236	PO BOX 44176	501(C)(3)	GENERAL	500
CALLAHAN TIRE CHARITY PRO-AM	BRADENTON FL 34209	5066 18TH AVE W	501(C)(3)	GENERAL	1,750
JAY'S HOPE FOUNDATION	MACON GA 31201	1157 FORSYTH ST	501(C)(3)	GENERAL	100
RESCUE MISSION OF MIDDLE GA	MACON GA 31201	7774 HAZEL ST	501(C)(3)	GENERAL	2,951
ASOLO THEATRE	SARASOTA FL 34243	5555 N TAMiami TRAIL	501(C)(3)	GENERAL	5,000
ANIMAL RESCUE COALITION	SARASOTA FL 34240	6320 TOWER LANE	501(C)(3)	GENERAL	5,000
DAVIS LOVE FOUNDATION	ST SIMONS ISLAND GA 31522	100 RETREAT AVE	501(C)(3)	GENERAL	5,000
DAVIS LOVE FOUNDATION	ST SIMONS ISLAND GA 31522	100 RETREAT AVE	501(C)(3)	GENERAL	3,000
ANIMAL RESCUE COALITION	SARASOTA FL 34240	6320 TOWER LANE	501(C)(3)	GENERAL	300
BOY SCOUTS OF CENTRAL GA	MACON GA 31217	4335 CONFEDERATE WAY	501(C)(3)	GENERAL	400

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Statement 14 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the
Year (continued)

Name	Address	Relationship	Status	Purpose	Amount
CHILDREN FIRST	1723 N ORANGE AVE		501(C) (3)	GENERAL	750
SARASOTA FL 34242	PO BOX 7200		501(C) (3)	GENERAL	500
EAGLE RANCH INC	CHESTNUT MOUNTAIN GA 3050		501(C) (3)	GENERAL	500
GIRLS INC OF SARASOTA COUNTY	201 S TUTTLE AVE		501(C) (3)	GENERAL	750
SARASOTA FL 34237	4780 CATTLEMEN		501(C) (3)	GENERAL	1,000
GIRL SCOUTS OF GULFCOAST FL	11757 FORSYTH ST		501(C) (3)	GENERAL	750
SARASOTA FL 34233	4405 DESOTO RD		501(C) (3)	GENERAL	750
JAY'S HOPE FOUNDATION	421 N LIME AVE		501(C) (3)	GENERAL	750
MACON GA 31201	376 ROGERS AVE		501(C) (3)	GENERAL	500
THE HAVEN	1020 N ORLANDO AVE #100		501(C) (3)	GENERAL	500
SARASOTA FL 34235	7774 HAZEL ST		501(C) (3)	GENERAL	250
MEALS ON WHEELS OF SARASOTA	4210 77T ST E		501(C) (3)	GENERAL	1,050
SARASOTA FL 34237	5955 RAND RD		501(C) (3)	GENERAL	1,000
MACON VOLUNTEER CLINIC	1809 LOMA LINDA		501(C) (3)	GENERAL	400
MACON GA 31204	1487 2ND ST		501(C) (3)	GENERAL	500
MAKE A WISH FOUNDATION	915 HAWTHORNE AVE		501(C) (3)	GENERAL	500
MAITLAND FL 32751	1 SELIG CIRCLE		501(C) (3)	GENERAL	1,690
RESCUE MISSION OF MIDDLE GA	5555 N TAMiami TRAIL		501(C) (3)	GENERAL	1,475
MACON GA 31201					
SOUTHEASTERN GUIDE DOGS					
PALMETTO FL 34221					
TIDEWELL HOSPICE INC					
SARASOTA FL 34238					
YUMMY STUFF CLUB					
SARASOTA FL 34239					
URBANITE THEATRE INC					
SARASOTA FL 34236					
THE ATHENS YMCA					
ATHENS GA 30606					
UNIV OF GA ATHLETIC ASSOC					
ATHENS GA 30602					
ASOLO THEATRE					
SARASOTA FL 34243					

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Statement 14 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the

Year (continued)

Name		Address		Relationship	Status	Purpose	Amount
Address							
AMERICAN CANCER SOCIETY OKLAHOMA CITY OK 73123 WINSPIRE		PO BOX 22718	501(C) (3)		GENERAL		9,250
LAGUNA HILLS CA 92653 SPECIAL OLYMPICS ATHLETE BOOSTER		23091 MILL CREEK DR	501(C) (3)		GENERAL		485
WASHINGTON DC 20036 JOHN HOPKINS CHILDREN'S CTR		1133 19TH ST NW	501(C) (3)		GENERAL		4,950
BALTIMORE MD 21287 HOUSTON CHARITY ASSOCIATION		1800 ORLEANS ST	501(C) (3)		GENERAL		2,431
HOUSTON TX 77045 ASOLO THEATRE		14105 POST OAK	501(C) (3)		GENERAL		11,330
SARASOTA FL 34243		5555 N TAMiami TRAIL	501(C) (3)		GENERAL		6,000
TOTAL							144,532