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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
Allen Family Foundation Inc

% STEVE KURTH

Number and street (or P O box number if mail is not delivered to street address)
2400 South Federal Highway

Room/suite

City or town, state or province, country, and ZIP or foreign postal code
Stuart, FL 34994

A Employer identification number
65-0783002

B Telephone number (see instructions)
(772) 288-6062

C If exemption application is pending, check here ▶ ☐

D 1. Foreign organizations, check here ▶ ☐

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

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

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

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

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

I Fair market value of all assets at end of year *(from Part II, col (c), line 16)*▶$ 788,535

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

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

			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)	0			
	2	Check ▶ ☑ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	21,976	21,976		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	8,522			
	b	Gross sales price for all assets on line 6a 76,830				
	7	Capital gain net income (from Part IV, line 2)		8,522		
	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	30,498	30,498		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	3,000			
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)	1,500	0	0	0
	c	Other professional fees (attach schedule)				
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	168	168		
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)	7,823	7,762		
	24	**Total operating and administrative expenses.** Add lines 13 through 23	12,491	7,930	0	0
	25	Contributions, gifts, grants paid	42,000			42,000
	26	**Total expenses and disbursements.** Add lines 24 and 25	54,491	7,930	0	42,000
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	-23,993			
	b	**Net investment income** (if negative, enter -0-)		22,568		
	c	**Adjusted net income**(if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	4,106	5,460	5,460
	2	Savings and temporary cash investments	19,790	12,867	12,867
	3	Accounts receivable ▶ Less allowance for doubtful accounts ▶			
	4	Pledges receivable ▶ Less allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ Less allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	576,279	557,855	770,208
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	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)	600,175	576,182	788,535
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	**Total liabilities**(add lines 17 through 22)	0	0	
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.**			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☑ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds	600,175	576,182	
	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)	600,175	576,182	
	31	**Total liabilities and net assets/fund balances** (see instructions)	600,175	576,182	

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	600,175
2	Enter amount from Part I, line 27a	2	-23,993
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	576,182
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	576,182

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	SEACOAST #7007 SEE ATTACHED			
b	SEACOAST #7007 SEE ATTACHED			
c	SEACOAST #7007 SEE ATTACHED			
d	CAPITAL GAIN DIVIDENDS	P		
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	896		784	112
b	39,041		37,384	1,657
c	34,281		30,140	4,141
d				2,612
e				

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

	(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	(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
a				112
b				1,657
c				4,141
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	8,522
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☑ No
If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2015	54,098	814,848	0 06639
2014	41,282	841,547	0 049055
2013	22,950	801,843	0 028622
2012	37,300	748,515	0 049832
2011	37,350	747,836	0 049944

2	**Total** of line 1, column (d)	2	0 243843
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 048769
4	Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	774,311
5	Multiply line 4 by line 3	5	37,762
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	226
7	Add lines 5 and 6	7	37,988
8	Enter qualifying distributions from Part XII, line 4 , ...	8	42,000

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	226
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)				
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			2	
3	Add lines 1 and 2			3	226
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			4	
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-			5	226
6	Credits/Payments				
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a	310		
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	310
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	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶			10	84
11	Enter the amount of line 10 to be **Credited to 2017 estimated tax** ▶ 84	**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		
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*	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	Yes	
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 ▶NONE

14 The books are in care of ▶STEVE KURTH Telephone no ▶(772) 288-9800

Located at ▶2400 SOUTH FEDERAL HIGHWAY Stuart FL ZIP+4 ▶34994

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		No
	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)

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
R E Allen 2400 South Federal Highway Stuart, FL 34994	President 2 0	0	0	0
Richard S Allen 2400 South Federal Highway Stuart, FL 34994	Director 2 0	0	0	0
Rex Allen 2400 South Federal Highway Stuart, FL 34994	Treasurer 2 0	0	0	0
Karen Allen 2400 South Federal Highway Stuart, FL 34994	Secretary 2 0	3,000	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

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

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

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

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

Part IX-A **Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 NONE	
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	762,893
b	Average of monthly cash balances.	1b	23,210
c	Fair market value of all other assets (see instructions).	1c	0
d	**Total** (add lines 1a, b, and c).	1d	786,103
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation). **1e**		
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	786,103
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	11,792
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	774,311
6	**Minimum investment return.** Enter 5% of line 5.	6	38,716

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	38,716
2a	Tax on investment income for 2016 from Part VI, line 5.	2a	226		
b	Income tax for 2016 (This does not include the tax from Part VI).	2b			
c	Add lines 2a and 2b.			2c	226
3	Distributable amount before adjustments Subtract line 2c from line 1.			3	38,490
4	Recoveries of amounts treated as qualifying distributions.			4	
5	Add lines 3 and 4.			5	38,490
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	38,490

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	42,000
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	42,000
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	226
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4.	6	41,774

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					38,490
2 Undistributed income, if any, as of the end of 2016					
a Enter amount for 2015 only.				0	
b Total for prior years 2014 , 2013 , 2012			0		
3 Excess distributions carryover, if any, to 2016					
a From 2011.					
b From 2012.					
c From 2013.					
d From 2014.	0				
e From 2015.	8,990				
f **Total** of lines 3a through e.		8,990			
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ $ 42,000					
a Applied to 2015, but not more than line 2a				0	
b Applied to undistributed income of prior years (Election required—see instructions).					
c Treated as distributions out of corpus (Election required—see instructions).					
d Applied to 2016 distributable amount.					38,490
e Remaining amount distributed out of corpus		3,510			
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		12,500			
b Prior years' undistributed income Subtract line 4b from line 2b			0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.					
d Subtract line 6c from line 6b Taxable amount —see instructions			0		
e Undistributed income for 2015 Subtract line 4a from line 2a Taxable amount—see instructions				0	
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2017					0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)					
8 Excess distributions carryover from 2011 not applied on line 5 or line 7 (see instructions) . . .					
9 **Excess distributions carryover to 2017.** Subtract lines 7 and 8 from line 6a		12,500			
10 Analysis of line 9					
a Excess from 2012. . . .					
b Excess from 2013. . . .					
c Excess from 2014. . . .	0				
d Excess from 2015. . . .	8,990				
e Excess from 2016. . . .	3,510				

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			
	(a) 2016	**(b)** 2015	**(c)** 2014	**(d)** 2013	**(e) Total**
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))

NA

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

NA

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**				42,000
b *Approved for future payment*				
Total . . . . ▶ **3b**				

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					
4 Dividends and interest from securities			14	21,975	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	8,523	
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)				30,498	

13 Total. Add line 12, columns (b), (d), and (e) 13 30,498

(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
Ashlie S Forum		2017-05-15		P01365590
Firm's name ▶ MARCUM LLP				Firm's EIN ▶
Firm's address ▶ ONE SE THIRD AVENUE SUITE 1100 MIAMI, FL 33131				Phone no (305) 995-9600

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*				
500 Year Forest Fund 1133 Old Abert Road Lynchburg, VA 24503	none	PC	To help conserve mature forest and the biologically diverse species they nurture	300
Boys & Girls Club Of Martin PO Box 910 Hobe Sound, FL 33475	none	PC	To help serve Martin County youth with after-school and summer programs and to help improve grades, increase physical activity and provide youth with opportunities for community service and leadership roles	300
Boys Town PO Box 6000 Boys Town, NE 68010	none	PC	To help give at-risk children and families the love, support and education they need to succeed	300
Bread Of Life Kitchen 2555 NE Savanna Rd Jensen Beach, FL 34957	none	PC	Give physical food for the body and spiritual food for the soul, through evangelism by sharing the good news of Jesus Christ Also, give non-perishable food to help the needs of the community	300
Council On Aging 900 SE Salerno Stuart, FL 34997	none	PC	To enhance the quality of life for our aging community by providing services that promote well-being and maintain independence	500
Discovery Riders PO Box 217 Bellefontaine, OH 43311	none	PC	Help provide physically, mentally and emotionally challenged people an opportunity to improve their lives through horsemanship	200
Fla Sherriff Youth Ranch PO Box 2000 Boys Ranch, FL 32064	none	PC	To help preventing juvenile crime and delinquency by guiding youngsters to productive lives as law-abiding citizens	300
Grand Lodge Charitable Foundation PO Box 629 Worthington, OH 43085	none	PC	To help invite, solicit, acquire, receive and accept gifts, bequests, devices and contributions and contract with donors for gift annuities for charitable, educational and scientific purposes	300
Guide Eyes For The Blind PO Box 709 Yorktown Heights, NY 10598	none	PC	To provide superbly bred and trained guide dogs to men and women who are blind or visually impaired	300
Hardin City Soup Kitchen 215 E North St Kenton, OH 43326	none	PC	To serve the needy of Hardin County	300
Harvest Food & Outreach 2520 Orange Ave Ft Pierce, FL 34947	none	PC	To serve those in poverty by providing crisis care, case management, transformative education, food and household subsidy, employmet training and placement and other social service providers	300
Helping Hands Outreach PO Box 151 Kenton, OH 43326	none	PC	TO HELP FAMILIES RAISE UP OUT OF THE ECONOMIC STRUGGLES	300
Hibiscus Children's Center PO Box 305 Jensen Beach, FL 34958	none	PC	To maintain a safe shelter for children who are abused, abandoned and neglected by providing prevention, residential, assessment and recovery programs	250
His Servants Place 2450 E Ocean Blvd Stuart, FL 34995	none	PC	To gather people who believed in Jesus Christ and to reach out to the community as an expression of the love that God has for all of us	300
House of Hope Martin County 2484 SE Bonita Street Stuart, FL 34997	none	PC	To help provide basic human needs for struggling people in Martin County, Florida	500
Total . . . . ▶ **3a**				42,000

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*				
Humane Soc Of Treas Coast 4100 SW Leighton Farm Ave Palm City, FL 34990	none	PC	To assure a better life for companion animals by providing shelter, finding loving homes and promoting respect for their place in our lives	1,000
Ladle of Love 10100 SE Federal Hwy Hobe Sound, FL 33455	none	PC	To make enthusiastic followers of Jesus Christ by joyfully sharing God's love	300
Manna Kitchen 1500 SE Kanner Hwy Stuart, FL 34995	none	PC	To serve a variety of persons in our community with a free, hot meal, fellowship and distribute collected resources including bread, clothing, toys and small household items	300
Mary's Kitchen 623 East Ocean Blvd Stuart, FL 34994	none	PC	To open the doors of the parish hall to serve a community dinner to any and all guests	300
Meals On Wheels 3337 SE Salerno Rd Stuart, FL 34996	none	PC	To help provide hot, noontime meals for those who are unsable to shop or cook	300
Military Order of Purple Heart Box 96188 Washington, DC 20077	none	PC	To provide counsel, a wide range of support, unwavering advocacy and a good measure of love to our warriors	300
Molly's House 430 SE Ocean Blvd Stuart, FL 34994	none	PC	To help keep families together by providing short-term, affordable accommodations for the families of hospitalized loved ones and hospital outpatients	500
Neighborhood Center 115 E Walnut St Kenton, OH 43326	none	PC	To assist in social services in Kenton, OH	300
New Horizons of Treasure Coast 4500 W Midway Rd Ft Pierce, FL 34981	none	PC	To help provide accessible behavioral and primary healthcare services to children, adults and families to achieve mental and physical wellness to improve quality of life	1,000
Operation Smile 3641 Faculty Blvd Virginia Beach, VA 23453	none	PC	To help provide children and young adults in developing countries who are born with cleft lip, cleft palate or other facial deformities	1,000
Our Daily Bread 223 Oakland Square Bellefontaine, OH 43311	none	PC	To help make the life-changing wisdom of the Bible understandable and accessible to all	300
Planned Parenthood 2300 N Florida Mango Rd West Palm Beach, FL 33409	none	PC	To help individuals throughout the world to manage his or her fertility regardless of the individual's income, marital status, race, ethnicity, sexual orientation, age, national origin or residence	650
Redeemer Soup Kitchen 2450 SE Ocean Blvd Stuart, FL 34996	none	PC	To provide nutritious meals in a safe, warm, and caring environment free of charge to anyone regardless of age, sex, race or financial qualification or religious beliefs	300
Salvation Army PO Box 2475 Stuart, FL 34995	none	PC	To Help preach the gospel of Jesus Christ and to meet human needs in His name without discrimination	500
Shirley May Breast Cancer PO Box 3265 Margate, NJ 08402	none	PC	To help benefit patients in Southeastern New Jersey who have been diagnosed with breast cancer	300
Total . . . . ▶ **3a**				42,000

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*				
Special Olympics PO Box 120128 Clermont, FL 34712	none	PC	To help provide year-round sports training and athletic competition in a variety of Olympic-type sports for children and adults with intellectual disabilities	300
The Safe Space 632 SE Monterey Rd Palm City, FL 34990	none	PC	To offer victims of domestic violence safety, support and education, empowering them to create an independant life, free from violence	500
The Smile Train PO Box 96231 Washington, DC 20090	none	PC	Helping train, fund and resource to empower local doctors in 85+ developing countries to provide 100%-free cleft repair surgery and comprehensive cleft care in their own communiteis	500
Treasure Coast Food Bank 3051 Industrial 25th St Ft Pierce, FL 34950	none	PC	To alleviate hunger by optaining and distributig food and other essentials in Indian River, Martin, St Lucie and Okeechobee Counties	300
Treasure Coast Hospice 1201 SE Indian St Stuart, FL 34997	none	PC	To help individuals and families facing serious health issues making choices and support and honor these choices	500
Treasure Coast Wildlife Center 8626 SW Citrus Blvd Palm City, FL 34990	none	PC	To help in the rehabilitation and return to the wild of sick, injured and orphaned wild animals as well as informational services directed toward the public at large	500
Women in Philantrophy 2135 SE Ocean Blvd Stuart, FL 34996	none	PC	To help harness the power of a diverse group of women who through the financial investment and collaboration influence the good health and well being of the community in a significant way	1,000
Visiting Nurse Assoc 2400 SE Monterey Blvd Stuart, FL 34996	none	PC	To help provide a wide spectrum of senior care aimed to keep patients and clients healthy and independent	500
Volunteers in Medicine 417 SE Balba Ave Stuart, FL 34994	NONE	PC	To promote, guide and help sustain a national network of free clinics emphasizing the use of retired medical and community volunteers within a culture of caring to improve access to health care for Americas underserved and uninsured	500
Doctors without Borders PO Box 5023 Hagerstown, MD 21741	NONE	PC	To help people worldwide where the need is greatest, delivering emergency medical aid to people affected by conflict, epidemics, disasters, or exclusion from health care	300
Elliott Museum 825 NE Ocean Blvd Stuart, FL 34996	NONE	PC	To Help enrich the community through its wide variety of exhibits, collections, classes and lectures, all designed to serve the interests of the people who live and visit the Treasure Coast	300
RE & JSA Foundation PO Box 1379 Stuart, FL 34995	Affilated	PF	Charitable Purposes - Scholarship	3,000
Barstow-Reed Society PO Box 9010 Stuart, FL 34995	NONE	PC	To help buy cutting-edge medical technologies and equipment, start new life-saving programs, build new facilities and educate skilled nursing team	20,000
The Carpenters Kitchen 1200 E 10th Street Stuart, FL 34996	none	PC	To help provide needed meals as a result of natural disasters or catastrophic events	200
Library Foundation 2351 SE Monterey Road Stuart, FL 34996	none	PC	To help enrich library services and facilities not met by public funding and to endow the library system for future generations	500
Total . . . . ▶ **3a**				42,000

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*				
Sandhill Cove Foundation 1500 SW Capri Palm City, FL 34990	NONE	PC	To provide annual scholarship assistance to employees and their children	500
Samaritan Center 1490 SE COVE ROAD STUART, FL 34997	NONE	PC	To meet the basic physical, spiritual, and socialneeds of people in our area, using the ministry of Jesus as our model	500
Total . . . 3a			▶	42,000

TY 2016 Accounting Fees Schedule

Name: Allen Family Foundation Inc

EIN: 65-0783002

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	1,500			

TY 2016 All Other Program Related Investments Schedule

Name: Allen Family Foundation Inc

EIN: 65-0783002

Category	Amount
NONE	

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

TY 2016 Depreciation Schedule

Name: Allen Family Foundation Inc

EIN: 65-0783002

TY 2016 Investments Corporate Stock Schedule

Name: Allen Family Foundation Inc

EIN: 65-0783002

Name of Stock	End of Year Book Value	End of Year Fair Market Value
EQUITY INVESTMENTS	557,855	770,208

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TY 2016 Other Expenses Schedule

Name: Allen Family Foundation Inc

EIN: 65-0783002

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
AGENCY FEES	7,762	7,762		
STATE FILING FEE	61			

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TY 2016 Other Income Schedule

Name: Allen Family Foundation Inc

EIN: 65-0783002

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
FEDERAL TAX REFUND			

TY 2016 Taxes Schedule

Name: Allen Family Foundation Inc

EIN: 65-0783002

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	168	168		