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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 separate instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2016

Open to Public Inspection

For calendar year 2016 or tax year beginning MAY 1, 2016, and ending APR 30, 2017

Name of foundation

CORA & MURRAY SIMPSON FAMILY FUND, INC.

A Employer identification number

52-2042057

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

5809 DEVONSHIRE DRIVE

Room/suite

B Telephone number

301-229-4880

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

BETHESDA, MD 20816

C If exemption application is pending, check here ☐

G Check all that apply:

☐

Initial return

☐

Initial return of a former public charity

☐

Final return

☐

Amended return

☐

Address change

☐

Name change

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

H Check type of organization:

☒

Section 501(c)(3) exempt private foundation

☐ Section 4947(a)(1) nonexempt charitable trust☐

Other taxable private foundation

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

I Fair market value of all assets at end of year

J Accounting method:

☒

Cash

☐

Accrual

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

(from Part II, col. (c), line 16)

☐ Other (specify)

\$ 1,559,048. (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))

(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			N/A		
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B					
	3 Interest on savings and temporary cash investments	12,279.	12,279.		STATEMENT 1	
	4 Dividends and interest from securities	26,294.	26,294.		STATEMENT 2	
	5a Gross rents					
	b Net rental income or (loss)					
	6a Net gain or (loss) from sale of assets not on line 10	48,578.				
	b Gross sales price for all assets on line 6a	336,268.				
	7 Capital gain net income (from Part IV, line 2)		48,578.			
	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)						
11 Other income	227.	227.		STATEMENT 3		
12 Total. Add lines 1 through 11	87,378.	87,378.				
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0.	0.		0.	
	14 Other employee salaries and wages					
	15 Pension plans, employee benefits					
	16a Legal fees					
	b Accounting fees	STMT 4	13,912.	0.		0.
	c Other professional fees					
	17 Interest					
	18 Taxes	STMT 5	1,888.	0.		0.
	19 Depreciation and depletion					
	20 Occupancy					
	21 Travel, conferences, and meetings					
	22 Printing and publications					
	23 Other expenses	STMT 6	2,297.	0.		0.
	24 Total operating and administrative expenses. Add lines 13 through 23		18,097.	0.		0.
	25 Contributions, gifts, grants paid		141,455.			141,455.
26 Total expenses and disbursements. Add lines 24 and 25		159,552.	0.		141,455.	
27 Subtract line 26 from line 12:						
a Excess of revenue over expenses and disbursements		<72,174.>				
b Net investment income (if negative, enter -0-)			87,378.			
c Adjusted net income (if negative, enter -0-)				N/A		

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing				
	2	Savings and temporary cash investments		43,097.	93,308.	93,308.
	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				
	7	Other notes and loans receivable ▶				
		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 STMT 7		53,672.	55,126.	56,410.
	b	Investments - corporate stock STMT 8		551,372.	512,244.	855,918.
	c	Investments - corporate bonds STMT 9		364,650.	316,554.	311,652.
	11	Investments - land, buildings, and equipment basis ▶				
	Less: accumulated depreciation ▶					
12	Investments - mortgage loans					
13	Investments - other STMT 10		288,004.	251,389.	241,760.	
14	Land, buildings, and equipment: basis ▶					
	Less: accumulated depreciation ▶					
15	Other assets (describe ▶)					
16	Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		1,300,795.	1,228,621.	1,559,048.	
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				
	22	Other liabilities (describe ▶)				
23	Total liabilities (add lines 17 through 22)		0.	0.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ▶ <input type="checkbox"/>					
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input checked="" type="checkbox"/>					
	27	Capital stock, trust principal, or current funds		0.	0.	
	28	Paid-in or capital surplus, or land, bldg., and equipment fund		0.	0.	
	29	Retained earnings, accumulated income, endowment, or other funds		1,300,795.	1,228,621.	
30	Total net assets or fund balances		1,300,795.	1,228,621.		
31	Total liabilities and net assets/fund balances		1,300,795.	1,228,621.		

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,300,795.
2	Enter amount from Part I, line 27a	2	<72,174.>
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	1,228,621.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,228,621.

Part IV Capital Gains and Losses for Tax on Investment Income**SEE ATTACHED STATEMENTS**

(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			
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			
b			
c			
d			
e	336,268.	287,690.	48,578.

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			
b			
c			
d			
e			48,578.

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	48,578.
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). If (loss), enter -0- in Part I, line 8	3	N/A

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	315,595.	1,599,259.	.197338
2014	94,810.	1,842,018.	.051471
2013	84,260.	1,740,842.	.048402
2012	81,400.	1,676,560.	.048552
2011	87,002.	1,645,868.	.052861

2 Total of line 1, column (d)	2	.398624
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	.079725
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	1,537,316.
5 Multiply line 4 by line 3	5	122,563.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	874.
7 Add lines 5 and 6	7	123,437.
8 Enter qualifying distributions from Part XII, line 4	8	141,455.

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.

CORA & MURRAY SIMPSON FAMILY FUND, INC.

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

Part VI

- 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

- 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-)
- 3 Add lines 1 and 2
- 4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)
- 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-

6a	1,800.
6b	
6c	
6d	

- 6 Credits/Payments:
- a 2016 estimated tax payments and 2015 overpayment credited to 2016
- b Exempt foreign organizations - tax withheld at source
- c Tax paid with application for extension of time to file (Form 8868)
- d Backup withholding erroneously withheld
- 7 Total credits and payments. Add lines 6a through 6d
- 8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached
- 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed
- 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid
- 11 Enter the amount of line 10 to be: Credited to 2017 estimated tax

1	874.
2	0.
3	874.
4	0.
5	874.
6a	1,800.
6b	
6c	
6d	
7	1,800.
8	
9	
10	926.
11	46.

Part VII-A Statements Regarding Activities

- 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?
- 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.
- c Did the foundation file Form 1120-POL for this year?
- d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:
(1) On the foundation. \$ 0. (2) On foundation managers. \$ 0.
- e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0.
- 2 Has the foundation engaged in any activities that have not previously been reported to the IRS?
If "Yes," attach a detailed description of the activities.
- 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
- 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?
- 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.
- 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?
- 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
- 8a Enter the states to which the foundation reports or with which it is registered (see instructions) MD
- 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
- 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
- 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses

	Yes	No
1a		X
1b		X
1c		X
2		X
3		X
4a		X
4b		X
5		X
6	X	
7	X	
8a	X	
8b	X	
9		X
10		X

N/A

Part VII-A Statements Regarding Activities (continued)

- 11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)
- 12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)
- 13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?

	Yes	No
11		X
12		X
13	X	

Website address **N/A**

- 14 The books are in care of **BURDETTE SMITH & BISH LLC** Telephone no. **(703) 591-5200**
 Located at **4035 RIDGE TOP RD, SUITE 550, FAIRFAX, VA** ZIP+4 **22030**

- 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 N/A

- 16 At any time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?

	Yes	No
16		X

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

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required**File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.**

- 1a During the year did the foundation (either directly or indirectly):

- (1) Engage in the sale or exchange, or leasing of property with a disqualified person?
- (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?
- (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?
- (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?
- (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)?
- (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☐ Yes ☒ No☐ Yes ☒ No☐ Yes ☒ No☐ Yes ☒ No☐ Yes ☒ No

N/A

1b

1c

X

- 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

1c

X

- 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?

- 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

- 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.

- 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?

☐ Yes ☒ No

- b If "Yes," did it have excess business holdings in 2016 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2016.)

N/A

3b

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

4a

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

Form 990-PF (2016)

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

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions) ☐ Yes ☒ No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here ☐**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

6b

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

6b

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

X

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

7b

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.

(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
MURRAY S. SIMPSON 5809 DEVONSHIRE DRIVE BETHESDA, MD 20816	DIRECTOR 0.00	0.	0.	0.
CORA S. SIMPSON 5809 DEVONSHIRE DRIVE BETHESDA, MD 20816	DIRECTOR 0.00	0.	0.	0.
THOMAS WALKER SIMPSON 3549 RAYMOOR ROAD KENSINGTON, MD 20895	DIRECTOR 0.00	0.	0.	0.
M. SCOTT SIMPSON P.O. BOX 1484 CORRALES, NM 87048	DIRECTOR 0.00	0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). 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 X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:	
a	Average monthly fair market value of securities	1a 1,467,073.
b	Average of monthly cash balances	1b 93,654.
c	Fair market value of all other assets	1c
d	Total (add lines 1a, b, and c)	1d 1,560,727.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e 0.
2	Acquisition indebtedness applicable to line 1 assets	2 0.
3	Subtract line 2 from line 1d	3 1,560,727.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4 23,411.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5 1,537,316.
6	Minimum investment return. Enter 5% of line 5	6 76,866.

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 76,866.
2a	Tax on investment income for 2016 from Part VI, line 5	2a 874.
b	Income tax for 2016. (This does not include the tax from Part VI.)	2b
c	Add lines 2a and 2b	2c 874.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3 75,992.
4	Recoveries of amounts treated as qualifying distributions	4 0.
5	Add lines 3 and 4	5 75,992.
6	Deduction from distributable amount (see instructions)	6 0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7 75,992.

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 141,455.
b	Program-related investments - total from Part IX-B	1b 0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2
3	Amounts set aside for specific charitable projects that satisfy the:	
a	Suitability test (prior IRS approval required)	3a
b	Cash distribution test (attach the required schedule)	3b
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4 141,455.
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	5 874.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6 140,581.

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				75,992.
2 Undistributed income, if any, as of the end of 2016			0.	
a Enter amount for 2015 only				
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2016:				
a From 2011				
b From 2012				
c From 2013				
d From 2014				
e From 2015	203,308.			
f Total of lines 3a through e	203,308.			
4 Qualifying distributions for 2016 from Part XII, line 4: ► \$ 141,455.			0.	
a Applied to 2015, but not more than line 2a				
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			75,992.
d Applied to 2016 distributable amount	65,463.			
e Remaining amount distributed out of corpus	0.			0.
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:	268,771.			
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2015. Subtract line 4a from line 2a. Taxable amount - see instr.			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)	0.			
8 Excess distributions carryover from 2011 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	268,771.			
10 Analysis of line 9:				
a Excess from 2012				
b Excess from 2013				
c Excess from 2014	203,308.			
d Excess from 2015	65,463.			
e Excess from 2016				

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

N/A

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

b Check box to indicate whether the foundation is a private operating foundation described in section

☐ 4942(j)(3) or ☐ 4942(j)(5)

2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

b 85% of line 2a

c Qualifying distributions from Part XII, line 4 for each year listed

d Amounts included in line 2c not used directly for active conduct of exempt activities

e Qualifying distributions made directly for active conduct of exempt activities.

Subtract line 2d from line 2c

3 Complete 3a, b, or c for the alternative test relied upon:

a "Assets" alternative test - enter:

(1) Value of all assets

(2) Value of assets qualifying under section 4942(j)(3)(B)(i)

b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed

c "Support" alternative test - enter:

(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)

(3) Largest amount of support from an exempt organization

(4) Gross investment income

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see instructions.)**1 Information Regarding Foundation Managers:**

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

SEE STATEMENT 11

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.

NONE

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

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

a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed:

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				
60 PLUS ASSOCIATION ALEXANDRIA, VA 22314	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	300.
ALZHEIMER'S ASSOCIATION CHICAGO, IL 60601	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	200.
ALL SAINTS CHURCH FOUNDATION CHEVY CHASE, MD	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	10,000.
ALLIANCE DEFENDING FREEDOM SCOTTSDALE, AZ 85260	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	400.
ALS ASSOCIATION WASHINGTON, DC 20005	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	200.
Total	SEE CONTINUATION SHEET(S)			141,455.
b Approved for future payment				
NONE				
Total				0.

Enter gross amounts unless otherwise indicated.

(See worksheet in line 13 instructions to verify calculations.)

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).

[illegible]


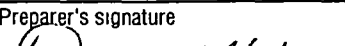
Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

<p>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?</p> <p>a Transfers from the reporting foundation to a noncharitable exempt organization of:</p> <p>(1) Cash</p> <p>(2) Other assets</p> <p>b Other transactions:</p> <p>(1) Sales of assets to a noncharitable exempt organization</p> <p>(2) Purchases of assets from a noncharitable exempt organization</p> <p>(3) Rental of facilities, equipment, or other assets</p> <p>(4) Reimbursement arrangements</p> <p>(5) Loans or loan guarantees</p> <p>(6) Performance of services or membership or fundraising solicitations</p> <p>c Sharing of facilities, equipment, mailing lists, other assets, or paid employees</p> <p>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.</p>	<p>Yes</p>

[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		

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.				May the IRS discuss this return with the preparer shown below (see instr.)? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
	 Signature of officer or trustee		9/12/17 Date		President Title	
Paid Preparer Use Only	Print/Type preparer's name DEBORAH L. HARRIS, CPA		Preparer's signature 		Check <input type="checkbox"/> if self-employed	
	PTIN P01430054		Date 9-11-17		Firm's EIN ▶ 45-4037800	
	Firm's name ▶ BURDETTE SMITH & BISH LLC				Firm's address ▶ 4035 RIDGE TOP ROAD, SUITE 550 FAIRFAX, VA 22030-7411	
				Phone no. 703-591-5200		

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	430 WILLIAMS COS INC COM	P	12/13/12	06/20/16
b	.50 FORTIVE CORP COM	P	12/07/11	07/01/16
c	.50 FORTIVE CORP COM	P	12/07/11	07/01/16
d	1016.457 MATTHEWS PACIFIC TIGER FUND	P	12/11/14	07/01/16
e	2568.275 VIRTUS EMERGING MARKETS OPPORTUNITY FUND	P	12/31/12	07/01/16
f	100 CITRIX SYS INC COM	P	06/06/13	07/06/16
g	25000 CITIGROUP INC FR 1.70% DTD	P	04/28/14	07/25/16
h	25000 CATERPILLAR INC NT 5.7% DTD	P	12/18/06	08/15/16
i	15 ALPHABET INC CAP STK CL A	P	02/10/11	09/02/16
j	60 APPLE INC COM	P	11/09/05	09/02/16
k	70 DOLLAR GEN CORP NEW COM	P	06/04/13	09/02/16
l	70 FISERV INC COM	P	11/29/11	09/02/16
m	60 HOME DEPOT INC COM	P	11/20/13	09/02/16
n	80 MICROSOFT CORP COM	P	09/27/12	09/02/16
o	65 TJX COS INC NEW COM	P	03/13/13	09/02/16

(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 9,662.		11,545.	<1,883.>
b 24.		11.	13.
c 24.			24.
d 25,000.		21,210.	3,790.
e 25,000.		26,505.	<1,505.>
f 7,893.		6,261.	1,632.
g 25,000.		25,327.	<327.>
h 25,000.		25,713.	<713.>
i 11,929.		4,638.	7,291.
j 6,434.		523.	5,911.
k 5,155.		3,475.	1,680.
l 7,298.		1,939.	5,359.
m 8,116.		4,802.	3,314.
n 4,631.		2,424.	2,207.
o 5,021.		2,932.	2,089.

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) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			<1,883.>
b			13.
c			24.
d			3,790.
e			<1,505.>
f			1,632.
g			<327.>
h			<713.>
i			7,291.
j			5,911.
k			1,680.
l			5,359.
m			3,314.
n			2,207.
o			2,089.

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

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).
If (loss), enter "-0-" in Part I, line 8

3

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	90 VISA INC COM CL A	P	11/01/12	09/02/16
b	575 EMC CORP MASS CON	P	03/05/13	09/07/16
c	.090 DELL TECHNOLOGIES INC COM CL V	P	10/26/12	09/08/16
d	175 VERIZON COMMUNICATIONS INC COM	P	11/25/15	09/30/16
e	25000 BANK AMER CHRLT NC MTN FR 1.125% DTD	P	04/28/14	11/14/16
f	2217.642 ANGEL OAK MULTI-STRATEGY INCOME FUND CLA	P	06/05/13	02/15/17
g	50 APPLE INC COM	P	11/09/05	02/15/17
h	70 AUTOMATIC DATA PROCESSING INC	P	07/22/11	02/15/17
i	3144.654 MFS MUNICIPAL HIGH INCOME FUND CL I	P	08/12/14	02/15/17
j	3422.463 RIDGEWORTH SEIX FLOATING RATE HIGH INCOM	P	06/30/14	02/15/17
k	64 DELL TECHNOLOGIES INC COM CL V	P	03/05/13	02/22/17
l	160 AMERICAN EXPRESS CO COM	P	03/19/15	03/23/17
m	AT MID CAP EQUITY FUND - INST	P	VARIOUS	12/21/16
n	MATTHEWS PACIFIC TIGER FUND - IS	P	VARIOUS	12/08/16
o	TWEEDY BROWNE GLOBAL VALUE FUND	P	VARIOUS	12/29/16

	(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	7,373.		3,235.	4,138.
b	16,854.		13,991.	2,863.
c	5.		4.	1.
d	9,163.		7,878.	1,285.
e	25,000.		25,048.	<48.>
f	25,000.		27,768.	<2,768.>
g	6,771.		436.	6,335.
h	6,944.		3,252.	3,692.
i	25,205.		25,036.	169.
j	30,000.		30,892.	<892.>
k	4,146.		3,021.	1,125.
l	12,480.		13,050.	<570.>
m	389.			389.
n	360.			360.
o	391.			391.

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) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			4,138.
b			2,863.
c			1.
d			1,285.
e			<48.>
f			<2,768.>
g			6,335.
h			3,692.
i			169.
j			<892.>
k			1,125.
l			<570.>
m			389.
n			360.
o			391.

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

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).
If (loss), enter "-0-" in Part I, line 8

3

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 AMORTIZATION ON BONDS			VARIOUS	VARIOUS
b				
c				
d				
e				
f				
g				
h				
i				
j				
k				
l				
m				
n				
o				

(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		<3,226.>	3,226.
b			
c			
d			
e			
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

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) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			3,226.
b			
c			
d			
e			
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

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	48,578.
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). If (loss), enter "-0-" in Part I, line 8 }		3	N/A

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)				
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
AMERICAN CIVIL RIGHTS UNION ALEXANDRIA, VA 22314	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	400.
AMERICAN COUNCIL OF SCIENCE & HEALTH NEW YORK, NY	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	300.
AMERICAN HEART ASSOCIATION DALLAS, TX 75231	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	200.
AMERICAN LEGISLATIVE EXCHANGE COUNCIL WASHINGTON, DC 20005	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	200.
AMERICAN LUNG ASSOCIATION WASHINGTON, DC	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	200.
AMERICAN MAJORITY PURCELLVILLE, VA	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	300.
ANIMAL ALLIES ARLINGTON, VA	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	1,500.
ASHBROOK CENTER ASHLAND, OH 44805	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	200.
ASSOCIATION OF MATURE AMERICAN CITIZENS FOUNDATION BOHEMIA, NY 11716	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	500.
AUDUBON NATURALIST SOCIETY LEESBURG, VA	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	500.
Total from continuation sheets				130,355.

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
BETHANY BEACH FIRE COMPANY BETHANY BEACH, DE	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	300.
BETHESDA-CHEVY CHASE RESCUE SQUAD BETHESDA, MD	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	500.
BOKAMOSO YOUTH FOUNDATION WASHINGTON, DC	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	200.
BOSQUE SCHOOL ALBUQUERQUE, NM 87120	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	500.
CAPITAL RESEARCH CENTER WASHINGTON, DC	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	200.
CATO INSTITUTE WASHINGTON, DC 20001	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	2,000.
CENTER FOR COMPETITIVE POLITICS ALEXANDRIA, VA	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	300.
CENTER FOR INDIVIDUAL RIGHTS WASHINGTON, DC 20036	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	200.
CITIZENS AGAINST GOVERNMENT WASTE WASHINGTON, DC 20004	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	200.
CITIZENS UNITED FOUNDATION WASHINGTON, DC 20003	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	300.
Total from continuation sheets				

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)				
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
CLARE BOOTHE LUCE POLICY INSTITUTE HERNDON, VA 20170	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	300.
COMMITTEE FOR A CONSTRUCTIVE TOMORROW WASHINGTON, DC	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	300.
COMPETITIVE ENTERPRISE INSTITUTE WASHINGTON, DC	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	300.
COTTONWOOD SCHOOL CORRALES, NM	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	500.
DISABLED VETERANS NATIONAL FOUNDATION WASHINGTON, DC	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	500.
EASTER SEALS CHICAGO, IL	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	200.
FOUNDATION FOR ECONOMIC EDUCATION TALLAHASSEE, FL 32302	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	200.
FREEDOM ALLIANCE DULLES, VA 20166	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	400.
FREEDOM WORKS FOUNDATION WASHINGTON, DC	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	500.
FRIENDS OF HEXAGON WASHINGTON, DC 20015	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	500.
Total from continuation sheets				

Part XV Supplementary Information**3** Grants and Contributions Paid During the Year (Continuation)

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
GLEN ECHO FIRE DEPARTMENT GLEN ECHO, MD	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	500.
GRACE EPISCOPAL DAY SCHOOL KENSINGTON, MD	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	5,200.
HABITAT FOR HUMANITY ATLANTA, GA	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	500.
HAVEN SHELTER & SERVICES, INC. WARSAW, VA 22572	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	500.
HIGHLAND HIGH SCHOOL WARRENTON, VA 20186	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	1,000.
HUNTINGTON DISEASE SOCIETY OF AMERICA NEW YORK, NY 10018	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	500.
INSTITUTE FOR ENERGY RESEARCH WASHINGTON, DC	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	200.
INTERCOLLEGIATE STUDIES INSTITUTE WILMINGTON, DE 19807	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	200.
JUDICIAL WATCH WASHINGTON, DC 20024	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	200.
JUNIOR LEAGUE OF WASHINGTON WASHINGTON, DC 20007	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	500.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
KAPPA DELTA FOUNDATION LEXINGTON, KY	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	1,000.
KING BARN DAIRY MOOSEUM BOYDS, MD	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	1,000.
LONDON SCHOOL BETHESDA, MD	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	2,500.
LEADERSHIP INSTITUTE ARLINGTON, VA	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	2,000.
LIGHT OF CHRIST ANGLICAN CHURCH HEATHSVILLE, VA 22473	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	500.
LITTLE FALLS VILLAGE GLEN ECHO, MD 20812	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	400.
LONGWOOD CENTER FOR THE VISUAL ARTS FARMVILLE, VA	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	300.
LONGWOOD UNIVERSITY FOUNDATION FARMVILLE, VA	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	10,000.
LUCY BURNS INSTITUTE MADISON, WI 53703	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	250.
MACULAR DEGENERATION FOUNDATION NORTHAMPTON, MA 1061	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	200.
Total from continuation sheets				

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)				
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
MACKINAC CENTER MIDLAND, MI 48640	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	300.
MARYLAND PUBLIC POLICY INSTITUTE GERMANTOWN, MD 20875	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	250.
MARYLAND PUBLIC TELEVISION OWINGS MILLS, MD 21117	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	300.
MEDIA RESEARCH CENTER ALEXANDRIA, VA	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	200.
MERCATUS CENTER AT GEORGE MASON UNIVERSITY ALBUQUERQUE, VA	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	300.
NATIONAL BRAIN TUMOR SOCIETY WILMINGTON, DE 19801	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	2,000.
NATIONAL CENTER FOR PUBLIC POLICY RESEARCH WASHINGTON, DC	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	200.
NATIONAL FOUNDATION FOR CANCER RESEARCH BETHESDA, MD 20814	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	770.
NATIONAL LEGAL POLICY CENTER FALLS CHURCH, VA	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	200.
NATIONAL MULTIPLE SCLEROSIS SOCIETY WASHINGTON, DC 20036	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	200.
Total from continuation sheets				

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)				
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
NATIONAL PARKINSON FOUNDATION MIAMI, FL	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	500.
NATIONAL PARKS CONSERVATION ASSOCIATION WASHINGTON, DC 20001	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	500.
NATIONAL RIGHT TO WORK LEGAL DEFENSE FOUNDATION SPRINGFIELD, VA	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	300.
NATIONAL WILDLIFE FOUNDATION WASHINGTON, DC	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	300.
NORTHUMBERLAND FAMILY YMCA HEATHVILLE, VA 22473	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	1,000.
NORTHUMBERLAND HISTORICAL SOCIETY SUNBURY, PA	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	3,000.
NORTHUMBERLAND PUBLIC LIBRARY HEATHSVILLE, VA	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	3,000.
NYUMBANI WASHINGTON, DC 20004	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	200.
ODK FOUNDATION LEXINGTON, VA 24450	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	500.
OLNEY THEATRE CENTER OLNEY, MD	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	500.
Total from continuation sheets				

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)				
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
PACIFIC LEGAL FOUNDATION SACRAMENTO, CA 95814	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	400.
POTOMAC COMMUNITY RESOURCES POTOMAC, MD 20854	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	500.
PRINCETON CANNON FOUNDATION PRINCETON, NJ	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	250.
PRINCETON UNIVERSITY PRINCETON, NJ	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	2,785.
PROJECT VERITAS MAMARONECK, NY 10543	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	200.
RICE'S HOTEL HUGHLETT'S TAVERN HEATHSVILLE, VA	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	5,000.
RIVER COUNTIES COMMUNITY FOUNDATION IRVINGTON, VA	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	500.
ROBERT E. LEE MEMORIAL ASSOCIATION STRATFORD, VA 22558	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	10,000.
ROUND HOUSE THEATRE BETHESDA, MD	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	200.
SAN GABRIEL THE ARCHANGEL EPISCOPAL CHURCH CORRALES, NM 87048	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	500.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
SMITHSONIAN CRAFT SHOW WASHINGTON, DC	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	1,000.
SOUTHEASTERN LEGAL FOUNDATION MARIETTA, GA 30062	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	400.
ST. ANDREW'S EPISCOPAL SCHOOL POTOMAC, MD	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	5,000.
ST. JOHNS COMMUNITY SERVICES WASHINGTON, DC 20037	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	300.
STATE POLICY NETWORK ARLINGTON, VA	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	400.
STRATHMORE HALL FOUNDATION ROCKVILLE, MD	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	250.
TAX FOUNDATION WASHINGTON, DC	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	400.
THE ANGLICAN DIGEST EUREKA SPRINGS, AR 72632	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	300.
THE CLAREMONT INSTITUTE UPLAND, CA 91786	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	200.
THE COLONIAL WILLIAMSBURG FOUNDATION WILLIAMSBURG, VA 23185	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	5,000.
Total from continuation sheets				

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)				
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
THE COLUMBIA FOUNDATION NEW YORK, NY	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	500.
THE FRANKLIN CENTER ALEXANDRIA, VA 22314	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	400.
THE HERITAGE FOUNDATION WASHINGTON, DC	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	10,000.
THE MONTEPELIER FOUNDATION ORANGE, VA 22960	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	5,000.
THE NATURE CONSERVANCY ARLINGTON, VA 22203	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	500.
THE SALVATION ARMY WASHINGTON, DC	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	5,000.
THOMAS JEFFERSON FOUNDATION CHARLOTTESVILLE, VA	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	5,000.
UNIVERSITY OF RICHMOND RICHMOND, VA	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	3,000.
UVA LAW SCHOOL FOUNDATION CHARLOTTESVILLE, VA	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	500.
UVA MCINTIRE SCHOOL OF COMMERCE CHARLOTTESVILLE, VA	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	500.
Total from continuation sheets				

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)				
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
WAMU WASHINGTON, DC 20016	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	500.
WASHINGTON WINTER SHOW WASHINGTON, DC	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	200.
WETA ARLINGTON, VA	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	500.
WOLF TRAP FOUNDATION VIENNA, VA	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	300.
YOUNG AMERICANS FOR LIBERTY FOUNDATION ARLINGTON, VA 22202	NONE	PUBLIC CHARITY	FURTHERANCE OF CHARITABLE PURPOSES	200.
RMC RESEARCH & EDUCATION FOUNDATION SILVER SPRING, MD 20910	NONE	PUBLIC CHARITY	F	10,000.
Total from continuation sheets				

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
CASH FROM CHARLES SCHWAB ACCT	12,279.	12,279.	
TOTAL TO PART I, LINE 3	12,279.	12,279.	

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
CHARLES SCHWAB	26,294.	0.	26,294.	26,294.	
TO PART I, LINE 4	26,294.	0.	26,294.	26,294.	

FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
MISC INCOME	227.	227.	
TOTAL TO FORM 990-PF, PART I, LINE 11	227.	227.	

FORM 990-PF ACCOUNTING FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT FEES	9,792.	0.		0.
ACCOUNTING FEE	4,120.	0.		0.
TO FORM 990-PF, PG 1, LN 16B	13,912.	0.		0.

FORM 990-PF

TAXES

STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
EXCISE TAXES	1,888.	0.		0.
TO FORM 990-PF, PG 1, LN 18	1,888.	0.		0.

FORM 990-PF

OTHER EXPENSES

STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MISCELLANEOUS EXPENSES	2,297.	0.		0.
TO FORM 990-PF, PG 1, LN 23	2,297.	0.		0.

FORM 990-PF

U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS

STATEMENT 7

DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
US TREAS NOTE	X		55,126.	56,410.
TOTAL U.S. GOVERNMENT OBLIGATIONS			55,126.	56,410.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			55,126.	56,410.

FORM 990-PF

CORPORATE STOCK

STATEMENT 8

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
COMMON STOCK	512,244.	855,918.
TOTAL TO FORM 990-PF, PART II, LINE 10B	512,244.	855,918.

CORA & MURRAY SIMPSON FAMILY FUND, INC.

52-2042057

FORM 990-PF

CORPORATE BONDS

STATEMENT 9

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE BONDS	316,554.	311,652.
TOTAL TO FORM 990-PF, PART II, LINE 10C	316,554.	311,652.

FORM 990-PF

OTHER INVESTMENTS

STATEMENT 10

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
MUTUAL FUNDS TAXABLE BOND FUNDS	COST	251,389.	241,760.
TOTAL TO FORM 990-PF, PART II, LINE 13		251,389.	241,760.

FORM 990-PF

PART XV - LINE 1A
LIST OF FOUNDATION MANAGERS

STATEMENT 11

NAME OF MANAGER

MURRAY S. SIMPSON
CORA S. SIMPSON