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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 12/1/2016 **, and ending** 11/30/2017

Name of foundation
THE DOCTOR FAMILY FOUNDATION

Number and street (or P O box number if mail is not delivered to street address) | Room/suite
P O BOX 1501, NJ2-130-03-31

City or town, state or province, country, and ZIP or foreign postal code
PENNINGTON NJ 08534-1501

Foreign country name | Foreign province/state/county | Foreign postal code

A Employer identification number
20-2047965

B Telephone number (see instructions)
609-274-6834

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)* ▶ $ 3,695,801

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)	500,908			
	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	73,432	73,432		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	154,227			
	b	Gross sales price for all assets on line 6a 1,255,360				
	7	Capital gain net income (from Part IV, line 2)		154,227		
	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	728,567	227,659		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc				
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)	2,500			2,500
	c	Other professional fees (attach schedule)	26,357	15,814		10,543
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	627			
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)				
	24	**Total operating and administrative expenses.** Add lines 13 through 23	29,484	15,814	0	13,043
	25	Contributions, gifts, grants paid	263,500			263,500
	26	**Total expenses and disbursements.** Add lines 24 and 25 .	292,984	15,814	0	276,543
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	435,583			
	b	**Net investment income** (if negative, enter -0-)		211,845		
	c	**Adjusted net income** (if negative, enter -0-)			0	

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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	1	434	434
	2	Savings and temporary cash investments	119,934	157,306	157,306
	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)			
	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)	2,632,701	2,804,144	3,538,061
	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)	2,752,636	2,961,884	3,695,801
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	2,752,636	2,961,884	
	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)	2,752,636	2,961,884	
	31	**Total liabilities and net assets/fund balances** (see instructions)	2,752,636	2,961,884	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	2,752,636
2	Enter amount from Part I, line 27a	2	435,583
3	Other increases not included in line 2 (itemize) ▶ FEDERAL EXCISE TAX REFUND	3	1,187
4	Add lines 1, 2, and 3	4	3,189,406
5	Decreases not included in line 2 (itemize) ▶ COST BASIS ADJUSTMENT	5	227,522
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	2,961,884

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a	See Attached Statement			
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				

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a				
b				
c				
d				
e				

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 / If (loss), enter -0- in Part I, line 7 }	2	154,227
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	0

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	171,668	2,984,348	0 057523
2014	160,702	3,150,607	0 051007
2013	190,038	3,226,527	0 058899
2012	166,119	3,028,427	0 054853
2011	137,519	2,904,220	0 047351

2	**Total** of line 1, column (d)	2	0 269633
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 053927
4	Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	3,537,841
5	Multiply line 4 by line 3	5	190,785
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	2,118
7	Add lines 5 and 6	7	192,903
8	Enter qualifying distributions from Part XII, line 4 . .	8	276,543

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	2,118	
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	2	0	
3	Add lines 1 and 2	3	2,118	
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	2,118	
6	Credits/Payments			
a	2016 estimated tax payments and 2015 overpayment credited to 2016 — 6a: 627			
b	Exempt foreign organizations—tax withheld at source — 6b:			
c	Tax paid with application for extension of time to file (Form 8868) — 6c: 1,491			
d	Backup withholding erroneously withheld — 6d:			
7	Total credits and payments Add lines 6a through 6d	7	2,118	
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	0	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	0	
11	Enter the amount of line 10 to be **Credited to 2017 estimated tax** ▶ **Refunded** ▶	11	0	

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		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)?	1b		X
	*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		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ▶ $ _____ (2) On foundation managers ▶$ _____			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ _____			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities*	2		X
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b	N/A	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T*	5		X
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XV*	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ NC			
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	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? *If "Yes," complete Part XIV*	9		X
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		X

Part VII-A Statements Regarding Activities *(continued)*

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ N/A

14 The books are in care of ▶ MLTC, A DIVISION OF BANK OF AMERICA, N A Telephone no ▶ 609-274-6834
Located at ▶ 1300 MERRILL LYNCH DRIVE PENNINGTON NJ ZIP+4 ▶ 08534-1501

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? See the instructions for exceptions and filing requirements for FinCEN Form 114 If "Yes," enter the name of the foreign country ▶	16		X

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

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

			Yes	No
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)? Organizations relying on a current notice regarding disaster assistance check here ▶ ☐	1b	N/A	
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		X
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	N/A	
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2016 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969, **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2016)*	3b	N/A	
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

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	N/A	
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? N/A ☐ Yes ☐ No			
	If "Yes," attach the statement required by Regulations section 53 4945–5(d)			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	6b		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			
b	If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	7b	N/A	

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
DONALD DOCTOR 301 CRAMER MOUNTAIN ROAD CRAMERTON, NC 2	PREDISENT 2 00	0		
MARY DOCTOR 301 CRAMER MOUNTAIN ROAD CRAMERTON, NC 2	SECRETARY/TRE 2 00	0		
JORDAN DOCTOR 512 MAYMONT DRIVE CRAMERTON, NC 28032-161	DIRECTOR 2 00	0		
LANDON DOCTOR 512 MAYMONT DRIVE CRAMERTON, NC 28032-161	DIRECTOR 2 00	0		

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

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

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

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

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

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over $50,000 for professional services ▶		

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

List the foundation's four largest direct charitable activities during the tax year Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1 NONE	
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 NONE	
Total. Add lines 1 through 3 ▶	0

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes			
a	Average monthly fair market value of securities		1a	3,452,808
b	Average of monthly cash balances		1b	138,909
c	Fair market value of all other assets (see instructions)		1c	
d	**Total** (add lines 1a, b, and c)		1d	3,591,717
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	
3	Subtract line 2 from line 1d		3	3,591,717
4	Cash deemed held for charitable activities Enter 1½ % of line 3 (for greater amount, see instructions)		4	53,876
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4		5	3,537,841
6	**Minimum investment return.** Enter 5% of line 5		6	176,892

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	176,892
2a	Tax on investment income for 2016 from Part VI, line 5	2a	2,118		
b	Income tax for 2016 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	2,118
3	Distributable amount before adjustments Subtract line 2c from line 1			3	174,774
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	174,774
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	174,774

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	276,543
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	276,543
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	2,118
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	274,425

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				174,774
2	Undistributed income, if any, as of the end of 2016				
a	Enter amount for 2015 only			76,829	
b	Total for prior years 20____, 20____, 20____				
3	Excess distributions carryover, if any, to 2016				
a	From 2011				
b	From 2012				
c	From 2013				
d	From 2014				
e	From 2015				
f	**Total** of lines 3a through e	0			
4	Qualifying distributions for 2016 from Part XII, line 4 ▶ $ 276,543				
a	Applied to 2015, but not more than line 2a			76,829	
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				174,774
e	Remaining amount distributed out of corpus	24,940			
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	24,940			
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				
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	24,940			
10	Analysis of line 9				
a	Excess from 2012				
b	Excess from 2013				
c	Excess from 2014				
d	Excess from 2015				
e	Excess from 2016	24,940			

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

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

b Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2016	(b) 2015	(c) 2014	(d) 2013	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					0
b 85% of line 2a					0
c Qualifying distributions from Part XII, line 4 for each year listed					0
d Amounts included in line 2c not used directly for active conduct of exempt activities					0
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					0
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter (1) Value of all assets					0
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					0
b "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					0
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)					0
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					0
(3) Largest amount of support from an exempt organization					0
(4) Gross investment income					0

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))

DONALD AND MARY DOCTOR

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

DONALD DOCTOR 301 CRAMER MOUNTAIN ROAD CRAMERTON, NC 28032 (704) 386-5924

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

c Any submission deadlines

PRIOR TO MAY 15

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors

EXCLUSIVELY FOR RELIGIOUS, CHARITABLE, SCIENTIFIC OR EDUCATIONAL PURPOSES

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 Attached Statement				
Total			▶ **3a**	263,500
b *Approved for future payment*				
NONE				
Total			▶ **3b**	0

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	73,432	
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	154,227	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a					
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)		0		227,659	0
13 **Total.** Add line 12, columns (b), (d), and (e)				13	227,659

(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)
	Not Applicable

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)		X
	(2) Other assets	1a(2)		X
b	Other transactions			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

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
		Not Applicable	

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

Signature of officer or trustee — Date: 4/11/2018 — Title: Trustee

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

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☒ if self-employed	PTIN
LAWRENCE F MCGUIRE		4/9/2018		P01233953

Firm's name ▶ PRICEWATERHOUSECOOPERS, LLP — Firm's EIN ▶ 13-4008324

Firm's address ▶ 600 GRANT STREET, PITTSBURGH PA, 15219 — Phone no 412-355-6000

Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name
WELL OF MERCY
Street
181 MERCY LN

City	State	Zip Code	Foreign Country
HAMPTONVILLE	NC	27020-7199	

Relationship	Foundation Status
NONE	PC

Purpose of grant/contribution	Amount
GENERAL OPERATING	5,000

Name
GASTON MEMORIAL HOSPITAL FOUNDATION INC
Street
2525 COURT DR

City	State	Zip Code	Foreign Country
GASTONIA	NC	28054	

Relationship	Foundation Status
NONE	PC

Purpose of grant/contribution	Amount
GENERAL OPERATING	6,000

Name
NOVUSWAY INC
Street
28 SPRUCE DR

City	State	Zip Code	Foreign Country
ARDEN	NC	28704-9539	

Relationship	Foundation Status
NONE	PC

Purpose of grant/contribution	Amount
GENERAL OPERATING	15,000

Name
COMPASSIONATE FRIENDS INC
Street
PO BOX 3696

City	State	Zip Code	Foreign Country
OAK BROOK	IL	60522-3696	

Relationship	Foundation Status
NONE	PC

Purpose of grant/contribution	Amount
GENERAL OPERATING	2,500

Name
LUTHERAN CHURCH OF THE REDEEMER
Street
1915 S NEW HOPE RD

City	State	Zip Code	Foreign Country
GASTONIA	NC	28054-8427	

Relationship	Foundation Status
NONE	PC

Purpose of grant/contribution	Amount
GENERAL OPERATING	50,000

Name
NORTH CAROLINA BLUMENTHAL PERFORMING ARTS CENTER FOUNDATION
Street
130 N TRYON ST STE 200

City	State	Zip Code	Foreign Country
CHARLOTTE	NC	28202-2100	

Relationship	Foundation Status
NONE	PC

Purpose of grant/contribution	Amount
GENERAL OPERATING	175,000

Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Field	Value
Name	REGIS HIGH SCHOOL
Street	55 EAST 84TH STREET
City	NEW YORK
State	NY
Zip Code	10028
Foreign Country	
Relationship	NONE
Foundation Status	PC
Purpose of grant/contribution	GENERAL OPERATING
Amount	5,000

Field	Value
Name	SALVATION ARMY
Street	615 SLATERS LN
City	ALEXANDRIA
State	VA
Zip Code	22314-1112
Foreign Country	
Relationship	NONE
Foundation Status	PC
Purpose of grant/contribution	GENERAL OPERATING
Amount	5,000

Field	Value
Name	
Street	
City	
State	
Zip Code	
Foreign Country	
Relationship	
Foundation Status	
Purpose of grant/contribution	
Amount	

Field	Value
Name	
Street	
City	
State	
Zip Code	
Foreign Country	
Relationship	
Foundation Status	
Purpose of grant/contribution	
Amount	

Field	Value
Name	
Street	
City	
State	
Zip Code	
Foreign Country	
Relationship	
Foundation Status	
Purpose of grant/contribution	
Amount	

Field	Value
Name	
Street	
City	
State	
Zip Code	
Foreign Country	
Relationship	
Foundation Status	
Purpose of grant/contribution	
Amount	

Part I, Line 6 (990-PF) - Gain/Loss from Sale of Assets Other Than Inventory

	Amount		Totals	Gross Sales	Cost or Other Basis Expenses, Depreciation and Adjustments	Net Gain or Loss
Long Term CG Distributions	410	Capital Gains/Losses		1,255,360	1,101,133	154,227
Short Term CG Distributions	0	Other sales		0	0	0

	Description	CUSIP #	Check "X" to include in Part IV	Purchaser	Check "X" if Purchaser is a Business	Acquisition Method	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Valuation Method	Expense of Sale and Cost of Improvements	Depreciation	Adjustments	Net Gain or Loss
1	ISHARES TIPS	464287176	X				2/8/2016	5/15/2017	74,613	73,343				0	1,270
2	ISHARES TIPS	464287176	X				2/11/2016	5/15/2017	15,014	14,771				0	243
3	ISHARES TIPS	464287176	X				2/11/2016	7/7/2017	88,729	88,290				0	439
4	ISHARES IBOXX $	464287242	X				10/20/2015	10/16/2017	12,759	12,269				0	490
5	ISHARES 7-10 YEAR	464287440	X				8/7/2015	12/9/2016	77,621	78,986				0	-1,365
6	ISHARES 7-10 YEAR	464287440	X				8/20/2015	12/9/2016	95,091	97,527				0	-2,436
7	ISHARES 1-3 YEAR	464287457	X				12/15/2016	10/16/2017	6,241	6,236				0	5
8	ISHARES RUSSELL MIDCAP	464287499	X				7/5/2013	10/16/2017	4,196	2,752				0	1,444
9	ISHARES TR RUSSELL 2000	464287655	X				12/8/2015	8/30/2017	66,129	55,320				0	10,809
10	ISHARES TR RUSSELL 2000	464287655	X				7/5/2016	8/30/2017	8,560	7,032				0	1,528
11	ISHARES TR RUSSELL 2000	464287655	X				7/12/2016	9/13/2017	48,573	41,040				0	7,533
12	ISHARES TR RUSSELL 2000	464287655	X				8/18/2016	9/13/2017	28,263	24,421				0	3,842
13	ISHARES MSCI ACWI ETF	464288257	X				5/23/2013	10/16/2017	8,820	6,679				0	2,141
14	ISHARES JP MORGAN EM BC	464288281	X				5/15/2017	10/16/2017	12,441	12,304				0	137
15	ISHARES MBS ETF	464288588	X				2/10/2014	12/15/2016	6,668	6,723				0	-55
16	ISHARES MBS ETF	464288588	X				1/7/2015	12/15/2016	2,540	2,635				0	-95
17	ISHARES MBS ETF	464288588	X				10/9/2014	12/15/2016	81,813	84,180				0	-2,367
18	ISHARES MBS ETF	464288588	X				1/7/2015	4/17/2017	92,246	94,527				0	-2,281
19	ISHARES 1-3 YEAR	464288646	X				5/6/2015	10/16/2017	13,047	13,076				0	-29
20	ISHARES U S PREFERRED	464288687	X				8/11/2016	10/16/2017	12,446	12,988				0	-542
21	ISHARES EDGE MSCI	46429B697	X				3/9/2016	10/16/2017	13,193	11,026				0	2,167
22	POWERSHARES EXCHANGE	73936Q769	X				12/9/2016	10/16/2017	11,734	11,805				0	-71
23	SPDR S&P 500 ETF TRUST	78462F103	X				10/19/2011	10/16/2017	11,728	5,659				0	6,069
24	SPDR S&P 500 ETF TRUST	78462F103	X				10/19/2011	10/16/2017	47,933	23,115				0	24,818
25	HEALTH CARE SELECT SPDF	81369Y209	X				10/24/2012	1/25/2017	55,465	32,158				0	23,307
26	HEALTH CARE SELECT SPDF	81369Y209	X				10/24/2012	1/25/2017	68,393	39,713				0	28,680
27	HEALTH CARE SELECT SPDF	81369Y209	X				10/24/2012	10/16/2017	10,014	4,916				0	5,098
28	SECTOR SPDR CONSMRS ST	81369Y308	X				11/19/2014	7/13/2017	52,052	46,367				0	5,685
29	SECTOR SPDR CONSMRS ST	81369Y308	X				4/15/2014	7/13/2017	3,970	3,140				0	830
30	SECTOR SPDR CONSMRS ST	81369Y308	X				10/22/2015	7/13/2017	33,994	31,525				0	2,469
31	CONSUMER DISCRETIONARY	81369Y407	X				9/2/2014	10/16/2017	14,129	10,687				0	3,442
32	SECTOR SPDR ENERGY	81369Y506	X				9/13/2017	10/16/2017	5,465	5,295				0	170
33	SPDR US FINANCIAL SECTOI	81369Y605	X				6/3/2015	5/22/2017	34,723	32,729				0	1,994
34	SPDR US FINANCIAL SECTOI	81369Y605	X				1/25/2017	5/22/2017	21,535	21,651				0	-116
35	SPDR US FINANCIAL SECTOI	81369Y605	X				9/23/2014	5/22/2017	25,744	22,586				0	3,158
36	SPDR US FINANCIAL SECTOI	81369Y605	X				7/5/2016	5/22/2017	19,735	16,364				0	3,371
37	SPDR US FINANCIAL SECTOI	81369Y605	X				1/25/2017	10/16/2017	7,817	7,006				0	811
38	SECTOR SPDR INDUSTRIAL	81369Y704	X				8/19/2013	10/16/2017	13,749	8,584				0	5,165
39	VANGUARD FTSE EMERGINC	922042858	X				5/22/2017	10/16/2017	7,723	6,960				0	763
40	VANGUARD MSCI PACIFIC	922042866	X				8/30/2017	10/16/2017	5,355	5,103				0	252
41	VANGUARD MSCI EUROPEAI	922042874	X				7/13/2017	10/16/2017	6,458	6,144				0	314
42	SELECT SECTOR SPDR TR	81369Y803	X				12/13/2012	10/16/2017	5,634	2,690				0	2,944
43	SELECT SECTOR SPDR TR	81369Y803	X				12/13/2012	10/16/2017	22,597	10,811				0	11,786

Part I, Line 16b (990-PF) - Accounting Fees

		2,500	0	0	2,500
	Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes (Cash Basis Only)
1	TAX PREP FEES	2,500			2,500

Part I, Line 16c (990-PF) - Other Professional Fees

		26,357	15,814	0	10,543
	Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes (Cash Basis Only)
1	AGENT FEES	26,357	15,814		10,543

Part I, Line 18 (990-PF) - Taxes

		627	0	0	0
	Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
1	ESTIMATED TAX PAYMENTS	627			

Part II, Line 13 (990-PF) - Investments - Other

			2,632,701	2,804,144	3,538,061
	Asset Description	Basis of Valuation	Book Value Beg of Year	Book Value End of Year	FMV End of Year
1					
2	ISHARES TR RUSSELL MIDCAP INDEX FD		0	44,548	57,173
3	ISHARES MSCI ACWI INDEX		0	90,538	122,498
4	ISHARES TR		0	165,989	168,384
5	ISHARES LEHMAN 1-3 YR		0	177,958	177,024
6	S&P US PFD STK INDEX FD		0	174,107	170,088
7	ISHARES TRUST SHS ISHARE		0	159,040	186,684
8	POWERSHARES EXCHANGE		0	160,884	158,953
9	SPDR TR UTS		0	505,837	845,912
10	SECTOR SPDR TR SHS BEN		0	116,521	138,560
11	SECTOR SPDR TR SHS BEN		0	153,879	204,125
12	SECTOR SPDR TR		0	71,543	74,697
13	SECTOR SPDR TR		0	95,303	111,566
14	SECTOR SPDR TR		0	142,169	193,353
15	SECTOR SPDR TR TECHNOLOGY		0	248,376	405,001
16	VANGUARD INTL EQTY INDX		0	94,879	103,683
17	VANGUARD PACIFIC ETF		0	69,490	75,286
18	VANGUARD EUROPEAN ETF		0	83,887	87,972
19	ISHARES TR		0	164,420	172,558
20	ISHARES TR		0	84,776	84,544

Part IV (990-PF) - Capital Gains and Losses for Tax on Investment Income

	Amount
Long Term CG Distributions	410
Short Term CG Distributions	0

	Description of Property Sold	CUSIP #	Acquisition Method	Date Acquired	Date Sold	Gross Sales Price	Depreciation Allowed	Adjustments	Cost or Other Basis Plus Expense of Sale	Gain or Loss	F M V as of 12/31/69	Adjusted Basis as of 12/31/69	Excess of FMV Over Adjusted Basis	Gains Minus Excess FMV Over Adj Basis or Losses
						1,254,950	0	0	1,101,133	153,817	0	0	0	153,817
1	ISHARES TIPS	464287176		2/8/2016	5/15/2017	74,613		0	73,343	1,270	0	0	0	1,270
2	ISHARES TIPS	464287176		2/11/2016	5/15/2017	15,014		0	14,771	243	0	0	0	243
3	ISHARES TIPS	464287176		2/11/2016	7/7/2017	88,729		0	88,290	439	0	0	0	439
4	ISHARES IBOXX $	464287242		10/20/2015	10/16/2017	12,759		0	12,269	490	0	0	0	490
5	ISHARES 7-10 YEAR	464287440		8/7/2015	12/9/2016	77,621		0	78,986	-1,365	0	0	0	-1,365
6	ISHARES 7-10 YEAR	464287440		8/20/2015	12/9/2016	95,091		0	97,527	-2,436	0	0	0	-2,436
7	ISHARES 1-3 YEAR	464287457		12/15/2016	10/16/2017	6,241		0	6,236	5	0	0	0	5
8	ISHARES RUSSELL MIDCAP	464287499		7/5/2013	10/16/2017	4,196		0	2,752	1,444	0	0	0	1,444
9	ISHARES TR RUSSELL 2000	464287655		12/8/2015	8/30/2017	66,129		0	55,320	10,809	0	0	0	10,809
10	ISHARES TR RUSSELL 2000	464287655		7/5/2016	8/30/2017	8,560		0	7,032	1,528	0	0	0	1,528
11	ISHARES TR RUSSELL 2000	464287655		7/12/2016	9/13/2017	48,573		0	41,040	7,533	0	0	0	7,533
12	ISHARES TR RUSSELL 2000	464287655		8/18/2016	9/13/2017	28,263		0	24,421	3,842	0	0	0	3,842
13	ISHARES MSCI ACWI ETF	464288257		5/23/2013	10/16/2017	8,820		0	6,679	2,141	0	0	0	2,141
14	ISHARES JP MORGAN EM BC	464288281		5/15/2017	10/16/2017	12,441		0	12,304	137	0	0	0	137
15	ISHARES MBS ETF	464288588		2/10/2014	12/15/2016	6,668		0	6,723	-55	0	0	0	-55
16	ISHARES MBS ETF	464288588		1/7/2015	12/15/2016	2,540		0	2,635	-95	0	0	0	-95
17	ISHARES MBS ETF	464288588		10/9/2014	12/15/2016	81,813		0	84,180	-2,367	0	0	0	-2,367
18	ISHARES MBS ETF	464288588		1/7/2015	4/17/2017	92,246		0	94,527	-2,281	0	0	0	-2,281
19	ISHARES 1-3 YEAR	464288646		5/6/2015	10/16/2017	13,047		0	13,076	-29	0	0	0	-29
20	ISHARES U.S PREFERRED	464288687		8/11/2016	10/16/2017	12,446		0	12,988	-542	0	0	0	-542
21	ISHARES EDGE MSCI	46429B697		3/9/2016	10/16/2017	13,193		0	11,026	2,167	0	0	0	2,167
22	POWERSHARES EXCHANGE	73936Q769		12/9/2016	10/16/2017	11,734		0	11,805	-71	0	0	0	-71
23	SPDR S&P 500 ETF TRUST	78462F103		10/19/2011	10/16/2017	11,728		0	5,659	6,069	0	0	0	6,069
24	SPDR S&P 500 ETF TRUST	78462F103		10/19/2011	10/16/2017	47,933		0	23,115	24,818	0	0	0	24,818
25	HEALTH CARE SELECT SPDR	81369Y209		10/24/2012	1/25/2017	55,465		0	32,158	23,307	0	0	0	23,307
26	HEALTH CARE SELECT SPDR	81369Y209		10/24/2012	1/25/2017	68,393		0	39,713	28,680	0	0	0	28,680
27	HEALTH CARE SELECT SPDR	81369Y209		10/24/2012	10/16/2017	10,014		0	4,916	5,098	0	0	0	5,098
28	SECTOR SPDR CONSMRS ST	81369Y308		11/19/2014	7/13/2017	52,052		0	46,367	5,685	0	0	0	5,685
29	SECTOR SPDR CONSMRS ST	81369Y308		4/15/2014	7/13/2017	3,970		0	3,140	830	0	0	0	830
30	SECTOR SPDR CONSMRS ST	81369Y308		10/22/2015	7/13/2017	33,994		0	31,525	2,469	0	0	0	2,469
31	CONSUMER DISCRETIONAR	81369Y407		9/2/2014	10/16/2017	14,129		0	10,687	3,442	0	0	0	3,442
32	SECTOR SPDR ENERGY	81369Y506		9/13/2017	10/16/2017	5,465		0	5,295	170	0	0	0	170
33	SPDR US FINANCIAL SECTOI	81369Y605		6/3/2015	5/22/2017	34,723		0	32,729	1,994	0	0	0	1,994
34	SPDR US FINANCIAL SECTOI	81369Y605		1/25/2017	5/22/2017	21,535		0	21,651	-116	0	0	0	-116
35	SPDR US FINANCIAL SECTOI	81369Y605		9/23/2014	5/22/2017	25,744		0	22,586	3,158	0	0	0	3,158
36	SPDR US FINANCIAL SECTOI	81369Y605		7/5/2016	5/22/2017	19,735		0	16,364	3,371	0	0	0	3,371
37	SPDR US FINANCIAL SECTOI	81369Y605		1/25/2017	10/16/2017	7,817		0	7,006	811	0	0	0	811
38	SECTOR SPDR INDUSTRIAL	81369Y704		8/19/2013	10/16/2017	13,749		0	8,584	5,165	0	0	0	5,165
39	VANGUARD FTSE EMERGINC	922042858		5/22/2017	10/16/2017	7,723		0	6,960	763	0	0	0	763
40	VANGUARD MSCI PACIFIC	922042866		8/30/2017	10/16/2017	5,355		0	5,103	252	0	0	0	252
41	VANGUARD MSCI EUROPEAI	922042874		7/13/2017	10/16/2017	6,458		0	6,144	314	0	0	0	314
42	SELECT SECTOR SPDR TR	81369Y803		12/13/2012	10/16/2017	5,634		0	2,690	2,944	0	0	0	2,944
43	SELECT SECTOR SPDR TR	81369Y803		12/13/2012	10/16/2017	22,597		0	10,811	11,786	0	0	0	11,786

Part VI, Line 6a (990-PF) - Estimated Tax Payments

		Date		Amount
1	Credit from prior year return		1	0
2	First quarter estimated tax payment	5/10/2017	2	157
3	Second quarter estimated tax payment	6/13/2017	3	157
4	Third quarter estimated tax payment	8/14/2017	4	156
5	Fourth quarter estimated tax payment	12/10/2017	5	157
6	Other payments		6	
7	Total		7	627

Part VIII, Line 1 (990-PF) - Compensation of Officers, Directors, Trustees and Foundation Managers

	Name	Check "X" if Business	Street	City	State	Zip Code	Foreign Country	Title	Avg Hrs Per Week	Compensation (0)	Benefits (0)	Expense Account (0)
1	DONALD DOCTOR		301 CRAMER MOUNTAIN ROAD	CRAMERTON	NC	28032-1613		PREDISENT	2 00	0		
2	MARY DOCTOR		301 CRAMER MOUNTAIN ROAD	CRAMERTON	NC	28032-1613		SECRETARY /TREASURE R	2 00	0		
3	JORDAN DOCTOR		512 MAYMONT DRIVE	CRAMERTON	NC	28032-1613		DIRECTOR	2 00	0		
4	LANDON DOCTOR		512 MAYMONT DRIVE	CRAMERTON	NC	28032-1613		DIRECTOR	2 00	0		

Part XIII, Line 2a, Column C (990-PF) - Prior Year Undistributed Income

1	Distributable amounts for 2015 that remained undistributed at the beginning of the 2016 tax year	1	76,829
2		2	
3		3	
4		4	
5		5	
6		6	
7		7	
8		8	
9		9	
10	Total	10	76,829

Schedule B
(Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ **Attach to Form 990, Form 990-EZ, or Form 990-PF.**
▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at *www.irs.gov/form990.*

OMB No 1545-0047

2016

Name of the organization	**Employer identification number**
THE DOCTOR FAMILY FOUNDATION	20-2047965

Organization type (check one)

Filers of:	**Section:**
Form 990 or 990-EZ	☐ 501(c)( ) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**
Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling $5,000 or more (in money or property) from any one contributor Complete Parts I and II See instructions for determining a contributor's total contributions

Special Rules

☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3 % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals Complete Parts I, II, and III

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc , purposes, but no such contributions totaled more than $1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc , contributions totaling $5,000 or more during the year ▶ $ _____

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Name of organization	Employer identification number
THE DOCTOR FAMILY FOUNDATION	20-2047965

Part I **Contributors** (See instructions) Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	Donald L Doctor 301 Cramer Mountain Rd Cramerton NC 28032-1613 Foreign State or Province Foreign Country	$ 500,908	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
	Foreign State or Province Foreign Country	$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
	Foreign State or Province Foreign Country	$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
	Foreign State or Province Foreign Country	$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
	Foreign State or Province Foreign Country	$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
	Foreign State or Province Foreign Country	$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Name of organization	Employer identification number
THE DOCTOR FAMILY FOUNDATION	20-2047965

Part II **Noncash Property** (See instructions) Use duplicate copies of Part II if additional space is needed

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	3973 SH OF VARIOUS STOCK	$ 500,908	12/23/2016
		$	
		$	
		$	
		$	
		$	

Name of organization	Employer identification number
THE DOCTOR FAMILY FOUNDATION	20-2047965

Part III ***Exclusively*** **religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than $1,000 for the year from any one contributor.** Complete columns **(a)** through **(e)** and the following line entry For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc , contributions of **$1,000 or less** for the year (Enter this information once See instructions) ▶ $ 0
Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee
For Prov Country	

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee
For Prov Country	

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee
For Prov Country	

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee
For Prov. Country	