

See a Social Security Number? Say Something! Report Privacy Problems to https://public.resource.org/privacy Or call the IRS Identity Theft Hotline at 1-800-908-4490



Return of Private Foundation

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

OMB No 1545-0052

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. Open to Public Inspection Internal Revenue Service For calendar year 2015 or tax year beginning 07/01/15 , and ending 06/30/16Name of foundation A Employer identification number John Woodruff Simpson Memorial 03-0210250 Library, Inc. Number and street (or P O box number if mail is not delivered to street address) Room/suite Telephone number (see instructions) 802-586-9692 7525 VT Route 14 City or town, state or province, country, and ZIP or foreign postal code If exemption application is pending, check here Craftsbury Common 05827 G Check all that apply Initial return Initial return of a former public charity 1 Foreign organizations, check here Final return Amended return 2 Foreign organizations meeting the Address change Name change 85% test, check here and attach computation Check type of organization |X| Section 501(c)(3) exempt private foundation If private foundation status was terminated under section 507(b)(1)(A), check here Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation J Accounting method Cash X Accrual I Fair market value of all assets at If the foundation is in a 60-month termination under section 507(b)(1)(B), check here end of year (from Part II, col (c), Other (specify) 600,672 line 16) ▶ \$ (Part I, column (d) must be on cash basis) (d) Disbursements Part I Analysis of Revenue and Expenses (The total of (c) Adjusted net (b) Net investment for charitable amounts in columns (b), (c), and (d) may not necessarily equal expenses per income purposes books the amounts in column (a) (see instructions)) (cash basis only) 1 Contributions, gifts, grants, etc., received (attach schedule) 105 Check ► X if the foundation is **not** required to attach Sch B 2 3 Interest on savings and temporary cash investments 7,588 7,588 7,588 4 Dividends and interest from securities 5a Gross rents b Net rental income or (loss) Revenue 6a Net gain or (loss) from sale of assets not on line 10 RECEIVED 168,791 Gross sales price for all assets on line 6a ιQb 7 Capital gain net income (from Part IV, line 2) 3 8 Net short-term capital gain L 3 ZJ10 9 Income modifications 10a Gross sales less returns and allowances b Less Cost of goods sold Gross profit or (loss) (attach schedule) C Stmt 1 308 308 11 Other income (attach schedule) -97 12 Total. Add lines 1 through 11 7,591 7,899 13 Compensation of officers, directors, trustees, etc. Administrative Expenses 19,800 19,800 14 Other employee salaries and wages 15 Pension plans, employee benefits 16a Legal fees (attach schedule) Stmt 2 2,369 Accounting fees (attach schedule) 2,369 b Other professional fees (attach schedule) C 17 1,515 1,507 Stmt 3 18 Taxes (attach schedule) (see instructions) Depreciation (attach schedule) and depletion Stmt 4 322 19 20 4,028 4,028 Occupancy 21 Travel, conferences, and meetings 4,124 4,124 22 Printing and publications 1,340 2,376 Stmt 5 3,850 1,340 23 Other expenses (att. sch.) 24 Total operating and administrative expenses. Add lines 13 through 23 36,008 1,340 1,340 34,204 50 25 Contributions, gifts, grants paid Total expenses and disbursements. Add lines 24 and 25 36,058 1,340 1,340 34,254 26 27 Subtract line 26 from line 12:

a Excess of revenue over expenses and disbursem

b Net investment income (if negative, enter -0-)

c Adjusted net income (if negative, enter -0-)

OFor Paperwork Reduction Act Notice, see instructions. -36,155Excess of revenue over expenses and disbursements 6,251 Net investment income (if negative, enter -0-)

6,559

| | | -PF (2015) John Woodruff Simpson Memorial Ralance Sheets Attached schedules and amounts in the description column | 03-021025 Beginning of year | | Page 2 of year |
|-----------------------------|--------|---|------------------------------|---|---------------------------------------|
| | Part I | Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions) | (a) Book Value | (b) Book Value | (c) Fair Market Value |
| T | 1 | Cash – non-interest-bearing | 4,610 | 9,699 | 9,699 |
| | 2 | Savings and temporary cash investments | 492 | 1,443 | |
| | 3 | Accounts receivable ▶ | | | |
| | _ | Less allowance for doubtful accounts ▶ | | | |
| | 4 | Pledges receivable ▶ | | | |
| | • | Less allowance for doubtful accounts ▶ | | | |
| | 5 | Grants receivable | | | |
| Ì | 6 | Receivables due from officers, directors, trustees, and other | | | |
| ļ | • | disqualified persons (attach schedule) (see | | | |
| 1 | | instructions) | | | |
| | 7 | Other notes and loans receivable (att schedule) | | | |
| ı | • | Less allowance for doubtful accounts | <u> </u> | | |
| ,, | 8 | Inventories for sale or use | | | |
| Assets | 9 | Prepaid expenses and deferred charges | 134 | | |
| 35 | 10a | Investments – U.S. and state government obligations (attach schedule) Stmt 6 | 61,174 | 8,217 | 8,217 |
| • | b | Investments – corporate stock (attach schedule) | 02/2/1 | 3,22 | |
| | C | Investments – corporate stock (attach schedule) See Stmt 7 | 53,460 | 7,150 | 7,150 |
| | 11 | Investments – land, buildings, and equipment, basis | 337100 | | 7 200 |
| | • • • | Less accumulated depreciation (attach sch.) | Ī | | |
| | 12 | Investments – mortgage loans | | | |
| | 13 | Investments - other (attach schedule) See Statement 8 | 368,940 | 433,368 | 433,368 |
| | 14 | Land, buildings, and equipment basis > 54,871 | 30073.0 | 100,000 | 1007000 |
| | '- | Less accumulated depreciation (attach sch) > Stmt 9 46,990 | 4,629 | 7,881 | 140,795 |
| | 15 | Other assets (describe ► | 1,522 | ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,, | |
| | 16 | Total assets (to be completed by all filers – see the | | | |
| | | instructions Also, see page 1, item I) | 493,439 | 467,758 | 600,672 |
| ٦ | 17 | Accounts payable and accrued expenses | 1,379 | 1,265 | · · · · · · · · · · · · · · · · · · · |
| | 18 | Grants payable | | | 1 |
| Se | 19 | Deferred revenue | | | 1 |
| abilities | 20 | Loans from officers, directors, trustees, and other disqualified persons | | | 1 |
| abi | 21 | Mortgages and other notes payable (attach schedule) | | | 1 |
| Ï | 22 | Other liabilities (describe ►) | | | 1 |
| | 23 | Total liabilities (add lines 17 through 22) | 1,379 | 1,265 | |
| _ | | Foundations that follow SFAS 117, check here | | | |
| Ś | | and complete lines 24 through 26 and lines 30 and 31. | | | |
| Se | 24 | Unrestricted | 492,060 | 466,493 | 3 |
| Ē | 25 | Temporarily restricted | | | 1 |
| ä | 26 | Permanently restricted | | | 1 |
| ב | | Foundations that do not follow SFAS 117, check here | | | 1 |
| 교 | | and complete lines 27 through 31. | | | |
| ō | 27 | Capital stock, trust principal, or current funds | | | |
| ets | 28 | Paid-in or capital surplus, or land, bldg , and equipment fund | | | 1 |
| SS | 29 | Retained earnings, accumulated income, endowment, or other funds | | | 1 |
| Net Assets or Fund Balances | 30 | Total net assets or fund balances (see instructions) | 492,060 | 466,493 | 3 |
| ž | 31 | Total liabilities and net assets/fund balances (see | , | , | 1 |
| | • | instructions) | 493,439 | 467,758 | 3 |
| _ | Part I | | | | - N |
| _ | | net assets or fund balances at beginning of year – Part II, column (a), line 30 (mu | st agree with | I | |
| | | of-year figure reported on prior year's return) | 3 · | 1 1 | 492,060 |
| | | s amount from Bort I. line 273 | | 2 | -36 15 |

466, 493 Form **990-PF** (2015)

5

10,588 466,493

4 Add lines 1, 2, and 3

5 Decreases not included in line 2 (itemize) ▶

3 Other increases not included in line 2 (itemize) \blacktriangleright See Statement 10

6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the

Part VI instructions

8 Enter qualifying distributions from Part XII, line 4

| | 990-PF(2015) John Woodruff Simpson Memorial 03-0210250 | | P | age 4 |
|-----------|---|--------|----------|--------------|
| | 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 ▶ X and enter "N/A" on line 1 | | | |
| | Date of ruling or determination letter. $01/01/41$ (attach copy of letter if necessary—see instructions) | | | |
| b | Domestic foundations that meet the section 4940(e) requirements in Part V, check N/A | | | |
| | here ▶ and enter 1% of Part I, line 27b | | | |
| С | 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-) | | | 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-) | | | 0 |
| 5 | Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- | | | 0 |
| 6 | Credits/Payments: | | | |
| а | 2015 estimated tax payments and 2014 overpayment credited to 2015 | | | |
| b | Exempt foreign organizations – tax withheld at source | | | |
| С | Tax paid with application for extension of time to file (Form 8868) 6c | | | |
| d | Backup withholding erroneously withheld 6d 6d | | | |
| 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 | | | |
| <u>11</u> | Enter the amount of line 10 to be Credited to 2016 estimated tax ▶ Refunded ▶ 11 | | | |
| Pa | rt 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 | | Yes | No |
| | 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 | | l | |
| | Instructions for the definition)? | 1b | L | 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 | |
| | (1) On the foundation ▶ \$ (2) On foundation managers ▶ \$ | | | |
| е | Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed | | 1 | |
| | on foundation managers \$ | | 1 | |
| 2 | Has the foundation engaged in any activities that have not previously been reported to the IRS? | 2 | <u> </u> | X |
| | 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 | | 1 | ., |
| | incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes | 3 | <u> </u> | X |
| 4a | Did the foundation have unrelated business gross income of \$1,000 or more during the year? | 4a | <u> </u> | X |
| ь | If "Yes," has it filed a tax return on Form 990-T for this year? | | 1 | 177 |
| 5 | Was there a liquidation, termination, dissolution, or substantial contraction during the year? | 5 | 1 | X |
| _ | If "Yes," attach the statement required by General Instruction T | | 1 | |
| 6 | Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either | | | |
| | By state logiciation that offertively amonds the governing instrument so that no mandatory directions that | | | |
| | By state legislation that effectively amends the governing instrument so that no mandatory directions that | | l v | |
| 7 | conflict with the state law remain in the governing instrument? | 7 | 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 | - - | 1^ | |
| 8a | Enter the states to which the foundation reports or with which it is registered (see instructions) ► VT | | | |
| 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 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)? If "Yes," | | | |
| | complete Part XIV | 9 | X | <u> </u> |
| 10 | Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their | | | |
| | names and addresses | 10 | <u> </u> | X |
| | | Form 9 | 90-PI | F (2015) |

| Form | 990-PF(2015) John Woodruff Simpson Memorial 03-0210250 |) | | | P | <u>age 5</u> |
|------|---|-----------|---------|----------|-------|--------------|
| Pa | rt 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 | | | | Yes | No |
| | 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 | | | 1 | | |
| | 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 applica | tion? | | 13 | X | |
| | Website address ► N/A | | | | | |
| 14 | | none no 🕨 | 802-5 | 86- | 283 | 1 |
| | 7525 VT Route 14 | | | | | |
| | Located at ▶ Craftsbury Common VT | ZIP+4 ▶ | 0582 | 7 | | |
| 15 | Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 – Check here | | | | | ▶ [] |
| | and enter the amount of tax-exempt interest received or accrued during the year | ▶ [| 15 | | | |
| 16 | At any time during calendar year 2015, did the foundation have an interest in or a signature or other authority | | | | Yes | No |
| | over a bank, securities, or other financial account in a foreign country? | | | 16 | | _X_ |
| | See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of | | | | 1 | |
| | the foreign country ▶ | | | <u> </u> | | |
| _Pa | irt VII-B Statements Regarding Activities for Which Form 4720 May Be Required | | | ţ | | |
| | 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 | X No | | | |
| | (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a | _ | | | | |
| | disqualified person? | Yes | X No | | | |
| | (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? | Yes | X No | | | |
| | (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? | Yes | X 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 | X 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 | X No | | | |
| b | If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulation | ons | | | | |
| | section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? | | N/A, | 1b | ļ | |
| | Organizations relying on a current notice regarding disaster assistance check here | | ▶ [_] | | | |
| С | 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 2015? | | N/A | 1c | | |
| 2 | Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private | | | | | |
| | operating foundation defined in section 4942(j)(3) or 4942(j)(5)) | | | | | |
| а | At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and | _ | | | | |
| | 6e, Part XIII) for tax year(s) beginning before 2015? | Yes | X 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 | | NT / 70 | | | |
| | all years listed, answer "No" and attach statement – see instructions) | | N/A | 2b | | _ |
| С | 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 Bidth foundation bld and the 200 duration of the control of | | | | | |
| 3a | Did the foundation hold more than a 2% direct or indirect interest in any business enterprise | | ₩ | | | |
| _ | at any time during the year? | Yes | X No | | | |
| b | If "Yes," did it have excess business holdings in 2015 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 | | N/A | 2. | | |
| 4- | foundation had excess business holdings in 2015.) | | IV/A | 3b | | X |
| 4a | Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes. | i. | | 4a | | \vdash |
| 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 20 | 1152 | | 4b | İ | Х |
| _ | Charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 20 | 1131 | | om 99 | 10-PF | |
| | | | | J | | 12010) |

| Form | 990-PF(2015) John Woodruff Simpson Memorial | 03-0 | 0210250 | | | Page 6 |
|------|--|--|-----------------------------------|--|----------------|---------------|
| Pa | rt VII-B Statements Regarding Activities for Which Form 4 | 1720 May Be R | Required (cont | inued) | | |
| 5a | During the year did the foundation pay or incur any amount to. | | | | I | |
| | (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4 | 945(e))? | | res X No | | |
| | (2) Influence the outcome of any specific public election (see section 4955), or to | o carry on, | | | Ī | |
| | directly or indirectly, any voter registration drive? | | \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ | ∕es X No | I | |
| | (3) Provide a grant to an individual for travel, study, or other similar purposes? | | | res X No | | |
| | (4) Provide a grant to an organization other than a charitable, etc., organization | described in | _ | | I | |
| | section 4945(d)(4)(A)? (see instructions) | | | res X 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? | | | res X No | Ī | |
| b | If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under | er the exceptions d | L | | ı | |
| | Regulations section 53 4945 or in a current notice regarding disaster assistance | • | | N/A | 5b | |
| | Organizations relying on a current notice regarding disaster assistance check he | • | | ▶ □ | | |
| С | If the answer is "Yes" to question 5a(4), does the foundation claim exemption fro | | | , | I | |
| - | because it maintained expenditure responsibility for the grant? | | N/A 🗍 Y | res No | Ī | |
| | 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 pa | v premiums | | | I | |
| Ju | on a personal benefit contract? | , promunio | | res X No | ļ | |
| ь | Did the foundation, during the year, pay premiums, directly or indirectly, on a per | sonal benefit cost | | 23 21 10 | 6ь | X |
| U | If "Yes" to 6b, file Form 8870 | Sonai Deneni Will | uot' | | 00 | |
| 72 | At any time during the tax year, was the foundation a party to a prohibited tax shi | alter transaction? | | res X No | ł | |
| | If "Yes," did the foundation receive any proceeds or have any net income attribut | | | N/A | 7ь | |
| | Information About Officers, Directors, Trustees, Fo | | | | | |
| ¥ .C | and Contractors | undation main | agers, riigiliy | r aid Lilipioy | ccs, | |
| 1 1 | ist all officers, directors, trustees, foundation managers and their compensation | ation (see instruc | tions) | | | |
| | and the officer of the original terms and the original terms of th | | | (d) Contributions to | Ī | |
| | (a) Name and address | (b) Title, and average hours per week | (c) Compensation (If not paid, | employee benefit | (е) Ехр | ense account, |
| | (a) Hame and address | devoted to position | enter -0-) | plans and deferred compensation | other | allowances |
| | a Chahamanh 11 | | | compensation | | - |
| se | e Statement 11 | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | _ | | |
| | | | | | | |
| | | | | 4 | l | |
| 2 | Compensation of five highest-paid employees (other than those included o "NONE." | n line 1 – see ins | tructions). It non | e, enter | | |
| | NOIL. | 1 | | (d) Contabutana ta | Ι – | |
| | (a) Name and address of each employee paid more than \$50,000 | (b) Title, and average hours per week | (c) Compensation | (d) Contributions to employee benefit | (e) Exp | ense account, |
| | (a) Name and address of each employee paid more than \$50,000 | devoted to position | (c) Compensation | plans and deferred compensation | other | allowances |
| | | | | compensation | - | |
| NC | NE | | | | | |
| | | | | <u> </u> | | |
| | | | | | | |
| | | | ļ | | - | |
| | | | | | İ | |
| | | | <u> </u> | | | |
| | | | | | | |
| | | | | <u> </u> | - | |
| | | | | | | |
| | | <u></u> | L | l | L | |
| Tota | I number of other employees paid over \$50,000 | | | | | 0 |

| Form 990-PF (2015) John Woodruff Simpson Memorial | 03-0210250 | Page 7 |
|---|--------------------------------|------------------|
| Part VIII Information About Officers, Directors, Trustees, Founda | tion Managers, Highly Paid E | Employees, |
| and Contractors (continued) | | |
| 3 Five highest-paid independent contractors for professional services (see instruc | tions). If none, enter "NONE." | <u> </u> |
| (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 chantable activities during the tax year. Include relevant statistical information suc organizations and other beneficiaries served, conferences convened, research papers produced, etc. | th as the number of | Expenses |
| 1 The foundation operates a library in East | Craftsbury, | |
| Vermont. The Library is open to the gener | | |
| | | 34,205 |
| 2 The foundation made a contribution to the | Craftsbury | |
| Vermont Historical Society. | | |
| | | 50 |
| 3 | | |
| | | |
| , | | |
| • | | |
| | | |
| Part IX-B Summary of Program-Related Investments (see instruction | tions) | |
| Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2 | | Amount |
| 1 N/A | | |
| | | |
| | | |
| 2 | | |
| | | |
| All other program-related investments See instructions | | - |
| 3 | | |
| | | |
| | | |

Total. Add lines 1 through 3

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

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

Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4

Amounts set aside for specific charitable projects that satisfy the

Adjusted qualifying distributions. Subtract line 5 from line 4

Suitability test (prior IRS approval required)

Cash distribution test (attach the required schedule)

Form 990-PF (2015)

37,828

3a

3ь

4

6

3

| Form | 1990-PF(2015) John Woodruff Simpson M | Memorial | 03-02102 | 50 | Page 9 |
|------|--|----------|---------------------|---|---------------|
| | urt XIII Undistributed Income (see instructions) | | | | |
| | ar same transfer and transfer a | (a) | (b) | (c) | (d) |
| 1 | Distributable amount for 2015 from Part XI, | Corpus | Years prior to 2014 | 2014 | 2015 |
| - | line 7 | _ | | *************************************** | <u> </u> |
| 2 | Undistributed income, if any, as of the end of 2015 | | | | |
| | Enter amount for 2014 only | | | | |
| | Total for prior years 20, 20, 20 | | | | |
| 3 | Excess distributions carryover, if any, to 2015 | | | | |
| а | From 2010 | | | | |
| b | From 2011 | : | | | |
| С | From 2012 | | | | |
| d | From 2013 | | | | |
| е | From 2014 | | | | |
| f | Total of lines 3a through e | | | · | |
| 4 | Qualifying distributions for 2015 from Part XII, | | | | |
| | line 4 ▶ \$0 | | | | |
| а | Applied to 2014, but not more than line 2a | | | | |
| | Applied to undistributed income of prior years | | | | |
| | (Election required – see instructions) | | İ | | |
| С | Treated as distributions out of corpus (Election | · | | | |
| | required – see instructions) | | | | |
| d | Applied to 2015 distributable amount | | | | |
| | Remaining amount distributed out of corpus | | | | |
| 5 | Excess distributions carryover applied to 2015 | | | | |
| | (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: | • • | | | |
| а | Corpus Add lines 3f, 4c, and 4e Subtract line 5 | | | | |
| b | Prior years' undistributed income Subtract | | | | |
| | line 4b from line 2b | | | | |
| С | 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 | | | İ | |
| d | Subtract line 6c from line 6b Taxable | | | | |
| | amount – see instructions | | | | |
| е | Undistributed income for 2014 Subtract line | | | | |
| | 4a from line 2a Taxable amount – see | | | | |
| | instructions | : | | | |
| f | Undistributed income for 2015. Subtract lines | | | - | : |
| | 4d and 5 from line 1 This amount must be | | | | |
| | distributed in 2016 | | | <u></u> | |
| 7 | Amounts treated as distributions out of corpus | | | i i | |
| | 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 2010 not | | | l l | |
| | applied on line 5 or line 7 (see instructions) | | | | |
| 9 | Excess distributions carryover to 2016. | | | Į. | |
| | Subtract lines 7 and 8 from line 6a | | | | |
| 10 | Analysis of line 9. | | | ‡ | |
| а | Excess from 2011 | | | ‡ | |
| b | Excess from 2012 | | | Į. | |
| С | Excess from 2013 | | | ‡ | |
| d | Excess from 2014 | | | ‡ | |
| е | Excess from 2015 | | 1 | | 1 |

DAA

| Form | 990-PF(2015) John Woodruf | f Simpson M | lemorial | 03-02102 | 50 | Page 10 |
|----------|---|---|----------------------------|----------------------------|--------------------|-------------------|
| | rt XIV Private Operating Fou | | | VII-A, question 9) | | |
| | If the foundation has received a ruling or | | | | | |
| | foundation, and the ruling is effective for | | | ▶ | 01 | /01/41 |
| ь | Check box to indicate whether the founda | | - | ed in section X 49 | 42(J)(3) or 4942(| |
| 2a | Enter the lesser of the adjusted net | Tax year | | Prior 3 years | | |
| | income from Part I or the minimum | (a) 2015 | (b) 2014 | (c) 2013 | (d) 2012 | (e) Total |
| | investment return from Part X for | | | | | |
| | each year listed | 6,559 | 10,944 | 10,797 | 9,418 | 37,718 |
| b | 85% of line 2a | 5,575 | 9,302 | 9,177 | 8,005 | 32,05 |
| c | Qualifying distributions from Part XII, | | | | | |
| | line 4 for each year listed | 37,828 | 39,945 | 36,580 | 36,274 | 150,62 |
| d | Amounts included in line 2c not used directly | 3.7323 | 3773.0 | 00,000 | 3,0,0 | |
| _ | for active conduct of exempt activities | | | | | |
| е | Qualifying distributions made directly | | | | | |
| · | for active conduct of exempt activities | | 1 | | | |
| | Subtract line 2d from line 2c | 37,828 | 39,945 | 36,580 | 36,274 | 150,62 |
| 3 | Complete 3a, b, or c for the | 3,,020 | 33,7313 | 30,300 | 30/211 | 100/02 |
| • | alternative test relied upon | | | | | |
| • | "Assets" alternative test – enter | | | | | |
| а | (1) Value of all assets | | | | | |
| | ` ' | | | | | |
| | (2) Value of assets qualifying under | | | | | |
| L | section 4942(j)(3)(B)(i) "Endowment" alternative test – enter 2/3 | | | | | |
| b | of minimum investment return shown in | | | | | |
| | | 15,572 | 16,461 | 16,011 | 14,881 | 62,92 |
| _ | Part X, line 6 for each year listed | 13,372 | 10,401 | 10,011 | 14,001 | 02,32 |
| С | "Support" alternative test – enter | | | | 1 | |
| | (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 | 4: 40 | 41 | | 1 05 000 | |
| Pā | urt XV Supplementary Inform | • • | - | the foundation ha | a \$5,000 or more | in assets at |
| | any time during the ye | | ions.) | | | |
| 1 | Information Regarding Foundation Ma | - | | | | |
| а | List any managers of the foundation who | | | | - | |
| | before the close of any tax year (but only | if they have contribute | d more than \$5,000) | (See section 507(d)(2) |) | |
| | N/A | _ . | | | | |
| b | List any managers of the foundation who | | • | | portion of the | |
| | ownership of a partnership or other entity | of which the foundation | on has a 10% or great | er interest | | |
| | N/A | | | | | |
| 2 | Information Regarding Contribution, C | | | | | |
| | Check here \blacktriangleright X if the foundation only | makes contributions to | o preselected charitab | le organizations and d | oes not accept | |
| | unsolicited requests for funds. If the foun | dation makes gifts, gra | ints, etc (see instruction | ons) to individuals or o | rganizations under | |
| | other conditions, complete items 2a, b, c | , and d. | | | | |
| а | The name, address, and telephone number | per or e-mail address o | f the person to whom | applications should be | addressed | |
| | N/A | | | | | |
| | | | | | | |
| b | The form in which applications should be | submitted and informa | ation and materials the | ey should include | | |
| | N/A | | | | | |
| С | Any submission deadlines | | | | | _ |
| | N/A | | | | | |
| d | Any restrictions or limitations on awards, | such as by geographic | cal areas, charitable fie | elds, kinds of institution | ns, or other | |
| | factors | | | | | |
| | N/A | | | | | |
| DAA | | | · ·- ·- | <u></u> | | Form 990-PF (2015 |

| 3 Grants and Contributions Paid | d During the | e Year or Approved for F | uture Payment | | |
|---|--------------|--|----------------------|----------------------------------|--------|
| Recipient | | If recipient is an individual, show any relationship to any foundation manager | Foundation status of | Purpose of grant or contribution | Amount |
| Name and address (home or bu | usiness) | or substantial contributor | recipient | | |
| a Paid during the year Vermont Historical 60 Washington St Barre VT 05641 | Society | None | Con | tribution | 50 |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | : | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| Total | - | 1 | <u></u> | ▶ 3a | 50 |
| b Approved for future payment N/A | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| Total | | | | ▶ 3b | |

| Ento- | /I-A Analysis of Income-Producing A | | d business income | Evoludo | by section 512, 513, or 514 | |
|--------------------|--|---------------------|---------------------------------------|--------------------------|-----------------------------|--|
| - | s amounts unless otherwise indicated m service revenue | (a) Business code | (b) Amount | (c) Exclusion code | (d) Amount | (e) Related or exempt function income (See instructions) |
| - | | | | † | | |
| | | - | | | | |
| | | - | | | | |
| | | - | | | | |
| | | | | | | |
| f | | | | | | |
| g Fee | es and contracts from government agencies | - | | | | |
| | ership dues and assessments | | | | | |
| | t on savings and temporary cash investments | | | 14 | 3 | |
| | nds and interest from securities | | | 14 | 7,588 | |
| 5 Net ren | ntal income or (loss) from real estate | | | | | |
| a Del | bt-financed property | | | | | |
| | t debt-financed property | | | | | |
| | ntal income or (loss) from personal property | | | | | |
| 7 Other in | nvestment income | | | | | |
| 8 Gain or | r (loss) from sales of assets other than inventory | | | 18 | -8,101 | |
| 9 Net inc | come or (loss) from special events | | | | | |
| 10 Gross p | profit or (loss) from sales of inventory | | · · · · · · · · · · · · · · · · · · · | | | |
| 11 Other re | | _ | | | | |
| ь <u>Мі</u> | scellaneous Income | | | 3 | 308 | |
| c | | _ | · · · · · · · · · · · · · · · · · · · | ļ <u>.</u> | | |
| d | | _ | | ļ | | |
| | | _ | | 1 | | |
| | al Add columns (b), (d), and (e) | | (|) | -202 | 0 |
| | Add line 12, columns (b), (d), and (e) | | | | 13 | -2 <u>02</u> |
| | sheet in line 13 instructions to verify calculations) | | | | | |
| Part XV | | | | | | |
| | | | | | | |
| Line No | b. Explain below how each activity for which incom | ne is reported in c | olumn (e) of Part XVI | -A contrib | outed importantly to the | |
| Line No ▼ | | ne is reported in c | olumn (e) of Part XVI | -A contrib | outed importantly to the | |
| Line No | b. Explain below how each activity for which incom | ne is reported in c | olumn (e) of Part XVI | -A contrib | outed importantly to the | |
| Line No ▼ | b. Explain below how each activity for which incom | ne is reported in c | olumn (e) of Part XVI | -A contrib | outed importantly to the | |
| Line No ▼ | b. Explain below how each activity for which incom | ne is reported in c | olumn (e) of Part XVI | -A contrib | outed importantly to the | |
| Line No ▼ | b. Explain below how each activity for which incom | ne is reported in c | olumn (e) of Part XVI | -A contrib | outed importantly to the | |
| Line No ▼ | b. Explain below how each activity for which incom | ne is reported in c | olumn (e) of Part XVI | -A contrib | outed importantly to the | |
| Line No ▼ | b. Explain below how each activity for which incom | ne is reported in c | olumn (e) of Part XVI | -A contrib | outed importantly to the | |
| Line No ▼ | b. Explain below how each activity for which incom | ne is reported in c | olumn (e) of Part XVI | -A contrib | outed importantly to the | |
| Line No ▼ | b. Explain below how each activity for which incom | ne is reported in c | olumn (e) of Part XVI | -A contrib | outed importantly to the | |
| Line No ▼ | b. Explain below how each activity for which incom | ne is reported in c | olumn (e) of Part XVI | -A contrib | outed importantly to the | |
| Line No ▼ | b. Explain below how each activity for which incom | ne is reported in c | olumn (e) of Part XVI | -A contrib | outed importantly to the | |
| Line No ▼ | b. Explain below how each activity for which incom | ne is reported in c | olumn (e) of Part XVI | -A contrib | outed importantly to the | |
| Line No ▼ | b. Explain below how each activity for which incom | ne is reported in c | olumn (e) of Part XVI | -A contrib | outed importantly to the | |
| Line No ▼ | b. Explain below how each activity for which incom | ne is reported in c | olumn (e) of Part XVI | -A contrib | outed importantly to the | |
| Line No ▼ | b. Explain below how each activity for which incom | ne is reported in c | olumn (e) of Part XVI | -A contrib | outed importantly to the | |
| Line No ▼ | b. Explain below how each activity for which incom | ne is reported in c | olumn (e) of Part XVI | -A contrib | outed importantly to the | |
| Line No ▼ | b. Explain below how each activity for which incom | ne is reported in c | olumn (e) of Part XVI | -A contrib | outed importantly to the | |
| Line No ▼ | b. Explain below how each activity for which incom | ne is reported in c | olumn (e) of Part XVI | -A contrib | outed importantly to the | |
| Line No ▼ | b. Explain below how each activity for which incom | ne is reported in c | olumn (e) of Part XVI | -A contrib | outed importantly to the | |
| Line No ▼ | b. Explain below how each activity for which incom | ne is reported in c | olumn (e) of Part XVI | -A contrib | outed importantly to the | |
| Line No ▼ | b. Explain below how each activity for which incom | ne is reported in c | olumn (e) of Part XVI | -A contrib | outed importantly to the | |
| Line No ▼ | b. Explain below how each activity for which incom | ne is reported in c | olumn (e) of Part XVI | -A contrib | outed importantly to the | |
| Line No ▼ | b. Explain below how each activity for which incom | ne is reported in c | olumn (e) of Part XVI | -A contrib | outed importantly to the | |

| orm 9 | 90-PF (201 | 2) OOIIII WOOC | ilull 3 | STIIDSOIL ME | emoriai | 03-0210230 | | | Pag | <u>е із</u> |
|-------|--------------|---------------------------------------|-----------------|--------------------------|---------------------------------------|---|---|---------|----------|-------------|
| Parț | | • | • | ansfers To and | d Transactio | ns and Relationships Wi | th Noncharitable |) | | |
| 4 5 | | Exempt Organiza | | | | Ab | | | /os T | No |
| | - | | | - | | other organization described | | F | es | No |
| | | • | a man sectio | ייכ ויכ ווכ organi | izations) of In Se | ction 527, relating to political | | | 1 | |
| | rganization | | | | | • | | Ī | | |
| | | om the reporting found | ation to a no | oncharitable exemp | ot organization o | T | | | - 1 | v |
| • | I) Cash | | | | | | | a(1) | -+ | <u>X</u> |
| | 2) Other as | | | | | | [1 | a(2) | | <u>X</u> |
| | ther transa | | | | | | | Ŧ | - 1 | |
| • | • | assets to a noncharita | • | · · | | | | b(1) | | <u>X</u> |
| (2 | 2) Purchas | es of assets from a no | oncharitable | exempt organization | on | | <u> 1</u> | b(2) | | X |
| (3 | 3) Rental o | of facilities, equipment, | or other ass | sets | | | <u> 1</u> | b(3) | | <u>X</u> |
| (4 |) Reimbu | rsement arrangements | 3 | | | | <u> 1</u> | b(4) | | <u>X</u> |
| (5 | 5) Loans o | r loan guarantees | | | | | 1 | b(5) | | <u>X</u> |
| (6 | 6) Perform | ance of services or me | embership o | r fundraising solicit | tations | | 1 | b(6) | _ | <u>X</u> |
| c S | haring of fa | acılıtıes, equipment, m | ailing lists, o | ther assets, or par | d employees | | Ĺ | 1c | | <u>X</u> |
| d If | the answe | r to any of the above is | s "Yes," com | plete the following | schedule Colu | mn (b) should always show the fa | aır market | | | |
| V | alue of the | goods, other assets, o | or services g | iven by the reportir | ng foundation If | the foundation received less tha | n fair market | | | |
| V | alue in any | transaction or sharing | arrangeme | nt, show in column | (d) the value of | the goods, other assets, or serv | ces received | | | |
| (a) | Line no | (b) Amount involved | (c) Name | e of noncharitable exemp | ot organization | (d) Description of transfers tr | ansactions, and sharing arra | ngement | s | |
| 1/A | | | | | | | | | _ | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| _ | | | | | <u> </u> | | | | | |
| | | | | | | | ··· ·· · · · · · · · · · · · · · · · · | | | |
| | | • | | | | | | | | |
| | | | | | | | | | | |
| _ | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | _ | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | - | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | 18.1 | | | |
| | . 41 6 | | | | | | | | | |
| | | • | • | | | exempt organizations | _ | 7 | X | NI. |
| | | section 501(c) of the | • | than section 501(c | c)(3)) or in section | on 527 ? | L | _ res | | NO |
| וו פו | | nplete the following sc | neaule | (h) T | | (-) 0 | | | | |
| NI | | a) Name of organization | | (b) Type of o | rganization | (c) Descri | otion of relationship | | | |
| IN , | /A | | | | · · · · · · · · · · · · · · · · · · · | | | | | |
| | | | | | | | | | | |
| | | · · · · · · · · · · · · · · · · · · · | | | | | · | | - | |
| | | | | ļ | | | | | - | |
| | T 11-1 | | | | | | | t | | |
| | | | | | | edules and statements, and to the best of which preparer has any knowledge | | | | |
| | | | | | | | May the IRS discus | | | |
| Sign | | | | | | | with the preparer st (see instructions)? | | es [| No |
| lere | | / D. · < | ۷۸ ' | • | , વ | -26-16 N Tro | | 21 | | |
| | | alerie 5. | 11/200 | 20v | | Trea | surer | | | |
| | Signa | ature of officer or trustee | | | Date | Title | ·- ·- ·- | | | |
| | Print/Ty | pe preparer's name | | | Preparer's signatu | re | Date | | Check | ď |
| امنط | | | | | 1 | | اما | ١٠ | self-emp | ployed |
| aid | Cath | erine L. Phil | | | | L. Phillips, CPA | 9/221 | | | |
| repar | I Firm's n | | | ens Associ | iates PC | | PTIN POO | | | |
| Jse O | Firm's a | address ► 47 Pa | ark Sti | reet | | | Firm's EIN ▶ 03-(| 318 | 371 | 4 |
| | 1 | Feeds | z .Tct | VT 054 | 52 | | Bhons as 802- | | | |

| | | Capital Gains and Losses | for Tax on In | vestment In | come | 0645 |
|--|--------------------------------------|---|---------------------------------------|--|--|---|
| Form 990-PF | For calend | dar year 2015, or tax year beginning | 07/01/1 | 5 , and ending | 06/30/16 | 2015 |
| Name | | | | | Employer Ider | ntification Number |
| John Woodru Library, I | | mpson Memorial | | | 03-0210 | 250 |
| (a) | List and describ 2-story brick wa | e the kınd(s) of property sold, e g , real estate, rehouse, 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) |
| | | elity GNMA | | P | Various | 08/03/15 |
| (2) 29.961 SI | | lity Contrafund | | P | Various | 10/05/15 |
| (3) 65.588 SI | | lity Select Energy | | <u>P</u> | Various | 10/05/15 |
| (4) 35.52 SH (5) 563.645 S | <u>Fidel:</u> SH Fide | ity Trend elity Telecom | | P P | Various Various | 10/05/15 01/25/16 |
| (5) 563.645 S (6) 72.494 SI | | lity Contrafund | | P | Various | 05/20/16 |
| (7) 36.52 SH | | ystematic | | P | 08/14/15 | 01/22/16 |
| (8) 63.75 SH | | rock Low | | P | 08/14/15 | 01/22/16 |
| | H Camb | iar Intl | | P | 01/22/16 | 04/06/16 |
| | | seway Intl | | P | 08/14/15 | 01/22/16 |
| | | are Inv | | P | 08/14/15 | 01/22/16_ |
| | | ware Value | | P | 01/22/16 | 04/06/16 |
| * · · · · · · · · · · · · · · · · · · · | | X-Trackers | | P P | 08/13/15 | 04/06/16 04/06/16 |
| | | ord Midcap Russell | · · · · · · · · · · · · · · · · · · · | P | 01/22/16 | Various |
| (15) 19 511 151 | nares i | (ussell | | <u> </u> | 1 00/13/13 | various |
| (e) Gross sales pre | ce | (f) Depreciation allowed (or allowable) | (g) Cost or oth plus expense | er basis of sale | (h) Gain (e) plus (f) | |
| $\overline{(1)}$ 4 | 000 | | | 3,653 | | 347 |
| | 000 | | | 1,504 | | 1,496 |
| | 000 | | | 1,891 | | 1,109 |
| | 000 | | ļ <u>.</u> | 2,061 | | 939 |
| | 000 | | | 8,594 | | 3,406 |
| | 385 | | | 3,739 | | 3,261 -116 |
| (7) | 611 | | | 501 617 | | <u>-116</u> |
| (8) (9) | 889 | | | 866 | | 23 |
| ************************************* | 186 | | | 3,829 | | -643 |
| (11) | 394 | | | 496 | | -102 |
| (12) | 299 | | | 272 | | 27 |
| (13) | 794 | | | 932 | | -138 |
| (14) | 26 | | | 24 | | 2 |
| (15) 	 1, | 851 | L | | 1,923 | | -72 |
| Complete only for a | acata abawir | as some a solume (b) and sumed by the | foundation on 12/21/6 | 0 | 1 | |
| (i) FMV as of 12/31 | | ng gain in column (h) and owned by the to (i) Adjusted basis as of 12/31/69 | (k) Excess over col (j) | | (I) Gains (Col col (k), but not les Losses (from | (h) gain minus s than -0-) Of |
| (1) | | as 01 123 1103 | over cor y | , ii wiy | Losses (nom | 347 |
| (<u>1</u>) (<u>2</u>) | | | - | | | 1,496 |
| (3) | | | | | | 1,109 |
| (4) | | | | | | 939 |
| (5) | | | | | | 3,406 |
| (6) | | | | | | 3,261 |
| (7) | | | <u> </u> | | 1 | -116 |
| (8) | | | - | | 1 | <u>-6</u> |
| (9) | | | | | 1 | 23 |
| (10) | | | | | | -643 -102 |
| (11) (12) | | | | | | 27 |
| (13) | - | | | | | -138 |
| (14) | | | | | 1 | 2 |
| (15) | | | | | | -72 |
| | | | | | | |

(14)

(15)

Capital Gains and Losses for Tax on Investment Income 990-PF 2015 07/01/15 , and ending 06/30/16 For calendar year 2015, or tax year beginning Name **Employer Identification Number** John Woodruff Simpson Memorial 03-0210250 Library, Inc. (C) Date acquired (mo , day, yr) (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 (d) Date sold (mo , day, yr) P-Purchase D-Donation 08/13/15 Vari<u>ous</u> Ishares Russell (1) SH Ishares Russell Ρ 10/28/15 06/29/16 (2)Р 08/13/15 $06/29/\overline{16}$ 6 SH Ishares Russell (3) Р 09/15/15 01/22/16 SH Ivy Mid Cap (4)01/22/16 Ρ 08/14/15 52.666 SH Metropolitan West (5) 01/22/16 Р 08/14/15 775 SH Oakmark I (6)Р 08/14/15 04/06/16 273.942 SH Pimco Foreign Bd (7)08/14/15 01/22/16 58.428 SH Pimco Short Term (8) Ρ 08/13/15 01/22/16 SH Vanquard Short Term Bnd (9)SH Vanguard Total Bond Ρ 01/22/16 (10) 08/13/15 Р 03/24/16 333.019 SH Virtus Insight Emerg Various (11)Ρ 03/24/16 04/06/16 95.567 SH Wells Fargo Emerg (12)01/22/16 0.927 SH Wells Fargo Special Р 04/06/16 (13)SH Oppenheimer Core Bond Р Various 08/05/15 (14)2765.826 Various 08/05/15 1619.777 SH Putnam US Govt (15)(h) Gain or (loss) (e) plus (f) minus (g) (e) Gross sales price (f) Depreciation allowed (g) Cost or other basis (or allowable) lus expense of sale <u>-</u>99 2,259 2,358 (1) 477 473 (2) -37 585 548 (3) -98 373 471 (4) 570 -8 562 (5)457 -212 245 (6)923 -137 786 (7)5<u>66</u> 573 (8) 160 160 (9) 163 162 (10)-1193,129 3,010 (11)925 929 -4 (12)28 26 (13)327 ,439 18,888 (14)-11722,111 994 (15)Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 (I) Gains (Col (h) gain minus col (k), but not less than -0-) Of (j) Adjusted basis as of 12/31/69 (k) Excess of col (i) (i) FMV as of 12/31/69 Losses (from col (h)) -99 (1) -4 (2) -37(3) -98 (4) -8 (5)-212 (6) -137 (7) (8) (9) -1(10)-119 (11)-4 (12)2 (13),439

-117

(15)

Capital Gains and Losses for Tax on Investment Income Form, 990-PF 2015 07/01/15 , and ending 06/30/16 For calendar year 2015, or tax year beginning Name **Employer Identification Number** John Woodruff Simpson Memorial 03-0210250 Library, Inc. (d) Date sold (mo , day yr) (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 (C) Date acquired (mo, day, yr) P-Purchase D-Donation 08/14/15 10/28/15 33.181 SH AMG Systematic (1) 8.4 SH Delaware Inv Р 08/14/15 10/28/15 (2)08/14/15 Ρ 08/13/15 9 SH Ishares Russell (3)SH Ishares Russell Р 08/13/15 08/14/15 (4)09/15/15 08/13/15 SH Ishares Russell Р (5)SH Ishares Tips Bond 08/13/15 P 08/14/15 (6)21.135 SH Oakmark I P 08/14/15 10/28/15 (7)203.595 SH Oppenheimer Core Bond Various 08/05/15 (8)Р Various 08/05/15 84.962 SH Putnam US Govt (9) P 09/15/15 (10) 36.905 SH Touchstone Small 08/14/15 P 08/05/15 3457.581 SH Oppenheimer Core Bond Various (11)P 08/05/15 2201.002 SH Putnam US Govt Various (12)LT Capital Gain Distrib (13)(14)(15)(h) Gain or (loss) (e) plus (f) minus (g) (e) Gross sales price (f) Depreciation allowed (g) Cost or other basis (or allowable) olus expense of sale 456 446 -10(1) 458 461 -3 (2) -3 908 911 (3) 307 307 (4)293 280 -13(5)1,899 ,902 -3(6)-9 1,415 1,406 (7) 1,390 1,412 -22(8) 1,154 1.163 -9 (9) 228 241 -13(10)-23,218 23,612 46,830 (11)29,886 32,340 -2,454(12)12,403 12,403 (13)(14)(15)Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 (I) Gains (Col. (h) gain minus ol. (k), but not less than -0-) OF Losses (from col. (h)) (k) Excess of col (i) over col (j), if any (i) FMV as of 12/31/69 (j) Adjusted basis as of 12/31/69 -10(1) (2) -3(3) (4)-13(5) (6)-9 (7) -22 (8) -9 (9) -13 (10) -23,218(11)-2,454(12)12,403 (13)(14)

6505 John Woodruff Simpson Memorial 03-0210250

Federal Statements

FYE: 6/30/2016

Statement 1 - Form 990-PF, Part I, Line 11 - Other Income

| Description | Reve B | Revenue per Books | Net Investment Income | Adju In | justed Net Income |
|----------------------|-----------|----------------------|--------------------------|------------|----------------------|
| Miscellaneous Income | ν | 308 | ν | · Υ | 308 |
| Total | S) | 308 | \$ | ٠ ٠ | 308 |
| | | | | | |

Statement 2 - Form 990-PF, Part I, Line 16b - Accounting Fees

| Charitable Purpose | \$ 2,369 |
|-----------------------|-----------------------------------|
| Adjusted Net | 0 0 0 |
| Net Investment | w w |
| Total | \$ 2,369 |
| Description | Indirect Accounting Fees Total |

Statement 3 - Form 990-PF, Part I, Line 18 - Taxes

| Description | | Total | Net Investmen | = | Adjusted Net | 7 | 은데 | haritable Purpose |
|---------------|--------------|-------|------------------|----------|-----------------|---|--------|----------------------|
| Payroll Taxes | 8 | 1,515 | s | | v | | တ | 1,507 |
| Total | \ \ \$ | 1,515 | S | 0 | S | 0 | ۍ ا | 1,507 |

Statement 4 - Form 990-PF, Part I, Line 19 - Depreciation

| | Adjusted Net Income | | | |
|-------------|------------------------------------|---------------------|---------------------|-------------------|
| | Net Investment Adjusted Net Income | ۷٠ | | |
| | Current Year Depreciation | v | | |
| | Life | 15 | 15 | 15 |
| | Method | S/L | S/L | S/L |
| | Prior Year Depreciation | 2,049 | 4,001 | 230 |
| Description | Cost Basis | 2,049 \$ | 4,001 | 230 |
| | Date Acquired | Lighting 6/30/81 \$ | bullaing 1/01/41 | wiring 6/30/81 |

| _ |
|---------------|
| ₹ |
| Ŋ |
| 42 |
| $\overline{}$ |
| _ |
| ဖ |
| $\overline{}$ |
| Ö. |
| Q |
| Σ |
| Ŋ |
| ග |
| |

6505 John Woodruff Simpson Memorial 03-0210250 FYE: 6/30/2016

Federal Statements

| লু |
|----------------|
| ᆲ |
| 딁 |
| 티 |
| 읙 |
| |
| ä |
| <u>ي</u> |
| Jepreciation (|
| <u>ब्र</u> |
| ٦ |
| 19 |
| ine 1 |
| ادً |
| ᅼ |
| 2art |
| |
| 990-PF, I |
| 긺 |
| 990-PF |
| |
| |
| 뛰 |
| 4 |
| 빔 |
| |
| ē |
| ā |
| S |

| | Adjusted Net Income | v | | | | | | | | | | | \$ |
|-------------|------------------------------|---------------------------|-------------------------|-------------------|--------|-------------------------|---------|-----------------|------------|-----------------------------|------------------|------------------------|-----------|
| | Net Investment Adjusted Net | <i>v</i> - | | | | | | | | | | | \$ |
| | Current Year Depreciation | 1 0 | | | | | | | | | 247 | 75 | \$ 322 |
| | Life | 25 \$ | 25 | 15 | 25 | 15 | 19 | 19 | 19 | 0 7 | 20 | 20 | O.F |
| | Method | | | | | | | | | | | | |
| | | S/L | $\rm S/L$ | S/L | S/L | $\mathrm{S/L}$ | S/L | $\rm S/L$ | S/Γ | S/L | S/L | S/L | |
| _ | Prior Year Depreciation | \$ 4,480 | 901'9 | 971 | 13,726 | 2,916 | 3,186 | 197 | 139 | & Equipment 6,417 | 1,650 | | \$ 46,668 |
| Description | Cost Basis | 4,480 9 | 901'9 | 971 | 13,726 | 2,916 | 3,186 | 197 | 139 | 1,330 Furniture 6,417 | 4,949 | 3,574 | 54,871 |
| | Date Acquired | Supply Room 6/30/82 \$ | Reading Room 6/30/82 | Wiring 6/30/82 | = | water system 6/30/84 | 9/30/86 | 51gn 9/30/86 | 11/30/86 | Fully Depreciated 6/30/84 | Root 10/23/08 | New Windows 1/16/16 | Total \$ |

| _ |
|---------------|
| ₹ |
| :42 |
| $\overline{}$ |
| ~ |
| ဖ |
| $\overline{}$ |
| 0 |
| /20 |
| $\overline{}$ |
| S |
| බ |

6505 John Woodruff Simpson Memorial

Federal Statements

03-0210250 FYE: 6/30/2016

| Other Expenses |
|---------------------|
| |
| Part I, Line 23 - (|
| _ |
| |
| u. |
| 990-PF, |
| 5 - Form |
| |
| 'n |
| |
| Statement |

| Charitable Purpose | <i>«</i> | 156 150 1,571 85 414 | \$ 2,376 |
|-----------------------|----------|---|----------|
| Adjusted Net | | 1,340 | 1,340 |
| Net Investment | | 1,340 | 1,340 |
| Total | S. | 156 150 1,705 1,340 85 | 3,850 \$ |
| Description | | Expenses Advertising Bank Charges Copier Lease Expense Investment Management Fees Miscellaneous Fees & Expenses | Total \$ |

Statement 6 - Form 990-PF, Part II, Line 10a - US and State Government Investments

| Fair Market Value | 8,217 | \$ 8,217 |
|----------------------|---|----------|
| Basis of Valuation | Market Market | |
| End of Year | 8,217 | 8,217 |
| ш | ς. | ω v |
| Beginning of Year | 53,157 8,017 | 61,174 |
| m o | S. | ω |
| Description | Putnam Fund - US Govt Income Trust Fidelity Govt Income Fund | Total |

Statement 7 - Form 990-PF, Part II, Line 10c - Corporate Bond Investments

| Description | a | eginning of Year | | End of Year | Basis of Valuation | T. | Fair Market Value |
|--|----------|---------------------|----|----------------|--------------------|----|----------------------|
| American Foreign Power Oppenheimer Bond Fund, Class A | w | 9,746 | w | 7,150 | Market Market | ۍ. | 7,150 |
| Total | φ. | 53,460 | w. | 7,150 | | ω | 7,150 |

| _ |
|---------------|
| _ |
| ₹ |
| 1:42 |
| ٠. |
| |
| $\overline{}$ |
| ဖ |
| |
| $\overline{}$ |
| 0 |
| /20 |
| $\overline{}$ |
| ↽ |
| Ø |
| = |
| ത് |
| |

6505 John Woodruff Simpson Memorial 03-0210250 FYE: 6/30/2016

Federal Statements

| 13 - Other Investments | |
|------------------------|--|
| Other | |
| • | |
| က | |
| ~ | |
| ā | |
| .⊑ | |
| _I | |
| | |
| _ | |
| , Parl | |
| u. | |
| 굽 | |
| エ | |
| 8 | |
| 990-PF | |
| _ | |
| Ę | |
| ō | |
| ŭ | |
| 1 | |
| ∞ | |
| 4 | |
| Z, | |
| ĕ | |
| 둤 | |
| 7 | |
| Œ | |
| Š | |
| Ī | |
| | |

| Description | ш | seginning of Year | | End of Year | Basis of Valuation | L | Fair Market Value |
|---|----|----------------------|----------|------------------|--------------------|----------|----------------------|
| Fidelity Contra Fund Fidelity Disciplined Equity | w. | 111,519 82,174 | v. | 101,173 | Market Market | ጥ | 101,173 |
| Fidelity Ginnie Mae Fidelity Real Estate Investment Fund | | 8,105 41,804 | | 4,194 51,704 | Market Market | | 4,194 51,704 |
| Fidelity Select Energy Service Fund | | 21,500 | | 14,686 | Market | | 14,686 |
| Fidelity Spartan 500 Index Fund Fidelity Trend Fund | | 45,313 16,103 | | 46,075 12,397 | Market Market | | 46,075 12,397 |
| Fidelity Telecom and Utilities Fund Morgan Stanley Managed Account | | 42,422 | | 32,308 95,077 | Market Market | | 32,308 95,077 |
| Total | \$ | 368,940 | ν | 433,368 | | S. | 433,368 |

| ling, and Equipment |
|-------------------------|
| Build |
| 9 14 - Land, I |
| Part II, Line |
| Form 990-PF, Part II, L |
| Statement 9 - |

| Net FMV | 140,795 | 140,795 |
|---------------------------------|------------------------------|---------|
| | σ | တ |
| End Accumulated Depreciation | 46,990 | 46,990 |
| End A Dep | ഗ | ဟ |
| End ist / Basis | 53,541 1,330 | 54,871 |
| ပို | ဟ | ς, |
| eginning let Book | 3,299 | 4,629 |
| ďΖ | ഗ | s S |
| Description | Building & Equipment Land | Total |

6505 John Woodruff Simpson Memorial
03-0210250 Federal Statements

9/21/2016 11:42 AM

FYE: 6/30/2016

Statement 10 - Form 990-PF, Part III, Line 3 - Other Increases

| Description | Amount |
|-------------------------------------|--------------|
| Net Unrealized Gains on Investments | \$ 10,588 |
| Total | \$ 10,588 |

| 6505 John Woodruff Simpson Memorial 03-0210250 FYE: 6/30/2016 | Federal S | ederal Statements | S | 9/21/ | 9/21/2016 11:42 AM |
|--|------------|-------------------------|---|-------------|--------------------|
| Statement 11 - Form 990-PF | Part VIII, | ine 1 - List of Etc. | Line 1 - List of Officers, Directors, Trustees, <u>Etc.</u> | , Trustees, | |
| Name and Address | Title | Average Hours | Compensation | Benefits | Expenses |
| Marjory Morrill 1972 E. Craftsbury Road East Craftsbury VT 05826 | President | 1.00 | 0 | 0 | 0 |
| Laurie Courage 1972 E. Craftsbury Road East Craftsbury VT 05826 | Secretary | 1.00 | 0 | 0 | 0 |
| Mary Lou Rylands 1972 E. Craftsbury Road East Craftsbury VT 05826 | Vice Pres. | 1.00 | 0 | 0 | 0 |
| Susan Field 1972 E. Craftsbury Road East Craftsbury VT 05826 | Trustee | 1.00 | 0 | 0 | 0 |
| Morris Rowell 1972 E. Craftsbury Road East Craftsbury VT 05826 | Trustee | 1.00 | 0 | 0 | 0 |
| Bruce Shields 1972 E. Craftsbury Road East Craftsbury VT 05826 | Trustee | 1.00 | 0 | 0 | 0 |
| Neil Ulman 1972 E. Craftsbury Road East Craftsbury VT 05826 | Trustee | 1.00 | 0 | 0 | 0 |
| Valerie Morrison 1972 E. Craftsbury Road East Craftsbury VT 05826 | Treasurer | 2.00 | 0 | 0 | 0 |
| Alicia Benoit-Clark 1972 E. Craftsbury Road East Craftsbury VT 05826 | Trustee | 1.00 | 0 | 0 | 0 |
| | | | | | 11 |

ŀ

| _ |
|---------------|
| \leq |
| _ |
| ⋖ |
| _ |
| |
| \sim |
| (1 |
| - |
| v |
| |
| |
| $\overline{}$ |
| |
| $\overline{}$ |
| |
| |
| |
| 9 |
| ~ |
| $\overline{}$ |
| • |
| \sim |
| \smile |
| \sim |
| . 4 |
| _ |
| |
| • |
| \sim |
| W |
| _ |
| ത |
| ന |
| |
| ٠, |
| ٠, |
| ٠, |

Federal Statements

6505 John Woodruff Simpson Memorial FYE: 6/30/2016 03-0210250

| Statement 11 - Form 990-PF, | 1 990-PF, Part VIII, Etc. (| VIII, Line 1 - List o Etc. (continued) | Part VIII, Line 1 - List of Officers, Directors, Trustees, Etc. (continued) | s, Trustees, | |
|--|--------------------------------|---|---|--------------|----------|
| Name and Address | Title | Average Hours | Compensation | Benefits | Expenses |
| Cynthia Walker 1972 E. Craftsbury Road East Craftsbury VT 05826 | Trustee | 1.00 | 0 | 0 | 0 |
| Charles Morrissey 1972 E. Craftsbury Road East Craftsbury VT 05826 | Trustee | 1.00 | 0 | 0 | 0 |
| Bonnie Strong 1972 E. Craftsbury Road East Craftsbury VT 05826 | Trustee | 1.00 | 0 | 0 | 0 |