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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

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Information about Form 990-PF and its instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2015

Open to Public Inspection

For calendar year 2015, or tax year beginning 01-01-2015, and ending 12-31-2015

Name of foundation JW JOHNSON FAMILY CHARITABLE TRUST		A Employer identification number 20-7203295	
Number and street (or P O box number if mail is not delivered to street address) 10813 EAST WINDGATE PASS DRIVE		B Telephone number (see instructions) (480) 513-1125	
City or town, state or province, country, and ZIP or foreign postal code SCOTTSDALE, AZ 85255		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
Initial return of a former public charity ☐ Amended return ☐ Name change ☐		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 9,265,277		J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)	

Part I Analysis of Revenue and Expenses <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</i>		Revenue and expenses per books (a)	Net investment income (b)	Adjusted net income (c)	Disbursements for charitable purposes (d) (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	65,827			
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	18,070	18,070		
	4 Dividends and interest from securities	117,239	117,239		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	306,098			
	b Gross sales price for all assets on line 6a 623,942				
	7 Capital gain net income (from Part IV, line 2) . . .		306,098		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	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	507,234	441,407		
	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule).				
	b Accounting fees (attach schedule).	4,995	2,497		2,498
	c Other professional fees (attach schedule)	16,062	16,062		0
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	60,520	520		0
	19 Depreciation (attach schedule) and depletion . .				
	20 Occupancy				
	21 Travel, conferences, and meetings.				
	22 Printing and publications				
	23 Other expenses (attach schedule).	1,125	303		302
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	82,702	19,382		2,800
	25 Contributions, gifts, grants paid	505,144			505,144
	26 Total expenses and disbursements. Add lines 24 and 25	587,846	19,382		507,944
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-80,612			
	b Net investment income (if negative, enter -0-)		422,025		
	c Adjusted net income (if negative, enter -0-) . . .				

Part II		Balance Sheets	Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing		492,904	194,443	194,443
	2	Savings and temporary cash investments				
	3	Accounts receivable ▶ <u>613</u>				
		Less allowance for doubtful accounts ▶ _____		745	613	613
	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)		521,996	516,703	591,729
	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)		5,445,128	5,627,402	8,478,492	
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)		6,460,773	6,339,161	9,265,277	
Liabilities	17	Accounts payable and accrued expenses			10,500	
	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 ▶ _____)		51,500	0	
	23	Total liabilities(add lines 17 through 22)		51,500	10,500	
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		0	0	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund		0	0	
	29	Retained earnings, accumulated income, endowment, or other funds		6,409,273	6,328,661	
	30	Total net assets or fund balances(see instructions)		6,409,273	6,328,661	
31	Total liabilities and net assets/fund balances(see instructions)		6,460,773	6,339,161		

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	6,409,273
2	Enter amount from Part I, line 27a	2	-80,612
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	6,328,661
5	Decreases not included in line 2 (itemize) ▶ _____	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	6,328,661

Part IV

Capital Gains and Losses for Tax on Investment Income

List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)		How acquired P—Purchase (b) D—Donation	Date acquired (c) (mo , day, yr)	Date sold (d) (mo , day, yr)
1 a	AMG 1274-PUBLICLY TRADED SECURITIES SHORT TERM	P		
b	AMG 1274-PUBLICLY TRADED SECURITIES LONG TERM	P		
c	AMG 6510-PUBLICLY TRADED SECURITIES SHORT TERM	P		
d	AMG 6510-PUBLICLY TRADED SECURITIES LONG TERM	P		
e	CAPITAL GAINS DIVIDENDS	P		

(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 19,462		20,040	-578
b 209,044		47,544	161,500
c 49,033		70,630	-21,597
d 199,103		179,630	19,473
e 147,300			147,300

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			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			-578
b			161,500
c			-21,597
d			19,473
e			147,300

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	306,098
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	

Part V

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

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)
If section 4940(d)(2) applies, leave this part blank

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2014	485,897	10,162,837	0 047811
2013	431,750	7,164,630	0 060261
2012	157,923	3,246,586	0 048643
2011	2,150,065	4,383,131	0 490532
2010	146,403	2,877,710	0 050875

2	Total of line 1, column (d).	2	0 698122
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 139624
4	Enter the net value of noncharitable-use assets for 2015 from Part X, line 5.	4	9,838,279
5	Multiply line 4 by line 3.	5	1,373,660
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	4,220
7	Add lines 5 and 6.	7	1,377,880
8	Enter qualifying distributions from Part XII, line 4.	8	507,944

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 VIExcise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the 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

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

8,441

4

Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)

4

0

5

Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-

5

8,441

6

Credits/Payments

a

2015 estimated tax payments and 2014 overpayment credited to 2015

6a

34,068

b

Exempt foreign organizations—tax withheld at source

6b

c

Tax paid with application for extension of time to file (Form 8868).

6c

d

Backup withholding erroneously withheld

6d

7

Total credits and payments. Add lines 6a through 6d.

7

34,068

8

Enter any **penalty** for underpayment of estimated tax. Check here ☒ if Form 2220 is attached

8

9

Tax due. If the total of lines 5 and 8 is more than line 7, enter **amount owed**

9

10

Overpayment. If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid**

10

25,627

11

Enter the amount of line 10 to be **Credited to 2015 estimated tax** 25,627 **Refunded**

11

0

Part VII-AStatements Regarding Activities

1a

During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?

1a

No

b

Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)?
If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.

1b

No

c

Did the foundation file **Form 1120-POL** for this year?

1c

No

d

Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year
(1) On the foundation \$ _____ 0 (2) On foundation managers \$ _____ 0

e

Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ _____ 0

2

Has the foundation engaged in any activities that have not previously been reported to the IRS?
If "Yes," attach a detailed description of the activities.

2

No

3

Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*

3

No

4a

Did the foundation have unrelated business gross income of \$1,000 or more during the year?

4a

No

b

If "Yes," has it filed a tax return on **Form 990-T** for this year?

4b

5

Was there a liquidation, termination, dissolution, or substantial contraction during the year?
If "Yes," attach the statement required by General Instruction T.

5

No

6

Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either
• By language in the governing instrument, or
• By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?

6

Yes

7

Did the foundation have at least \$5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XV.*

7

Yes

8a

Enter the states to which the foundation reports or with which it is registered (see instructions)
 AZ _____

b

If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation.*

8b

Yes

9

Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)?
If "Yes," complete Part XIV

9

No

10

Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses.*

10

No

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Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶N/A	13	Yes	
14	The books are in care of ▶AMG NATIONAL TRUST BANK Telephone no ▶(303) 694-2190 Located at ▶6295 GREENWOOD PLAZA BLVD GREENWOOD VILLAGE CO ZIP+4 ▶801114908			
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 over a bank, securities, or other financial account in a foreign country? See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country ▶	16	Yes	No

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		
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 2015? ☐	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015? ☐ Yes ☒ No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions). ☐	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015.</i>) ☐	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2015?	4b		No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (Continued)

5a

During the year did the foundation pay or incur any amount to

(1)

Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes

☒ No

(2)

Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

☐ Yes

☒ No

(3)

Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes

☒ No

(4)

Provide a grant to an organization other than a charitable, etc , organization described in section 4945(d)(4)(A)? (see instructions).

☐ Yes

☒ No

(5)

Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes

☒ No

b

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

5b

Organizations relying on a current notice regarding disaster assistance check here.

☐

c

If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

☐ Yes

☐ No

If "Yes," attach the statement required by Regulations section 53.4945–5(d).

6a

Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes

☒ No

b

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

6b

No

If "Yes" to 6b, file Form 8870.

7a

At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes

☒ No

b

If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

7b

Part VIII

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

1

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

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
See Additional Data Table				

2

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

(a) Name and address of each employee paid more than \$50,000	Title, and average hours per week (b) devoted to position	(c) Compensation	Contributions to employee benefit plans and deferred compensation (d)	Expense account, (e) 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.		0

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 NOT APPLICABLE	0
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 NOT APPLICABLE	0
2	
All other program-related investments. See instructions.	
3	
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	9,905,577
b	Average of monthly cash balances.	1b	82,524
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	9,988,101
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	9,988,101
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	149,822
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	9,838,279
6	Minimum investment return. Enter 5% of line 5.	6	491,914

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	491,914
2a	Tax on investment income for 2015 from Part VI, line 5.	2a	8,441
b	Income tax for 2015 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	8,441
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	483,473
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	483,473
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	483,473

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	507,944
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	507,944
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	507,944

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 2014	(c) 2014	(d) 2015
1 Distributable amount for 2015 from Part XI, line 7				483,473
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2015				
a From 2010.	3,637			
b From 2011.	1,958,754			
c From 2012.				
d From 2013.	78,568			
e From 2014.	11,440			
f Total of lines 3a through e.	2,052,399			
4 Qualifying distributions for 2015 from Part XII, line 4				
a Applied to 2014, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2015 distributable amount.				483,473
e Remaining amount distributed out of corpus	24,471			
5 Excess distributions carryover applied to 2015 (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	2,076,870			
b Prior years' undistributed income Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions.		0		
e Undistributed income for 2014 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 2015.				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2010 not applied on line 5 or line 7 (see instructions).	3,637			
9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a.	2,073,233			
10 Analysis of line 9				
a Excess from 2011.	1,958,754			
b Excess from 2012.				
c Excess from 2013.	78,568			
d Excess from 2014.	11,440			
e Excess from 2015.	24,471			

Part XIV

b Check box to indicate whether the organization is a private operating foundation described in section 170(c)(2)(B)(i) or 170(c)(2)(B)(ii): ☐ 170(c)(2)(B)(i) or ☐ 170(c)(2)(B)(ii)

b 85% of line 2a

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

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

a "Assets" alternative test—enter

(1) Value of all assets

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

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

c "Support" alternative test—enter

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

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

(3) Largest amount of support from an exempt organization

(4) Gross investment income

Part XV

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))

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

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

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

a The name, address, and telephone number or email address of the person to whom applications should be addressed

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

c Any submission deadlines

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

Part XV

Supplementary Information(continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	505,144
b Approved for future payment				
Total			3b	0

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2015)

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?

(1) Cash.

(2) Other assets.

- (1)** Sales of assets to a noncharitable exempt organization.
- (2)** Purchases of assets from a noncharitable exempt organization.
- (3)** Rental of facilities, equipment, or other assets.
- (4)** Reimbursement arrangements.
- (5)** Loans or loan guarantees.
- (6)** Performance of services or membership or fundraising solicitations.

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 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

(a) Name of organization	(b) Type of organization	(c) Description of relationship

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.

***** 2016-04-25 *****

Signature of officer or trustee Date Title

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

Print/Type preparer's name CHRIST MCNEILL CPA	Preparer's Signature	Date	Check if self-employed ☒	PTIN P01379799
Firm's name ☒ AMG NATIONAL TRUST BANK			Firm's EIN ☒ 84-1595367	
Firm's address ☒ 6295 GREENWOOD PLAZA BLVD GREENWOOD VILLAGE, CO 801114908			Phone no (303) 694-2190	

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation(If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
JOEL W JOHNSON	TRUSTEE 1 00	0	0	0
10813 E WINDGATE PASS DRIVE SCOTTSDALE,AZ 85255				
ELIZABETH B JOHNSON	TRUSTEE 1 00	0	0	0
10813 E WINDGATE PASS DRIVE SCOTTSDALE,AZ 85255				
KATHERINE E JOHNSON POTTER	TRUSTEE 1 00	0	0	0
4 SNOW STREET SHERBORN,MA 01770				
DR GEOFFREY B JOHNSON	TRUSTEE 1 00	0	0	0
5453 HAWTHORN HILL LANE NE ROCHESTER,MN 55906				
PETER J JOHNSON	TRUSTEE 1 00	0	0	0
7551 PLUM ST NEW ORLEANS,LA 70118				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
AMERICAN CANCER SOCIETY 333 WILSHIRE BOULEVARD LOS ANGELES, CA 90010	NONE	EXEMPT	SCIENCE	500
AMERICAN RED CROSS 6135 N BLACK CANYON HWY PHOENIX, AZ 85015	NONE	EXEMPT	SCIENCE	5,000
ARIZONA DISABLED SPORTS 59 E BROADWAY RD MESA, AZ 85210	NONE	EXEMPT	COMMUNITY	5,000
CHERISH CENTER 1004 22ND STREET MILFORD, IA 51351	NONE	EXEMPT	COMMUNITY	250
DANA-FARBER CANCER INSTITUTE 450 BROOKLINE AVENUE BOSTON, MA 02215	NONE	EXEMPT	MEDICAL	2,000
DOCTORS WITHOUT BORDERS 337 7TH AVENUE NEW YORK, NY 100015004	NONE	EXEMPT	MEDICAL	500
DORSET CONGREGATIONAL CHURCH 200 MAPLE HILL LN DORSET, VT 05251	NONE	EXEMPT	RELIGIOUS	50
DORSET PLAYERS INC 173 CHENEY RD DORSET, VT 05251	NONE	EXEMPT	COMMUNITY	500
DOVER SHERBORN MIDDLE SCHOOL MUSIC 157 FARM STREET DOVER, MA 020300400	NONE	EXEMPT	EDUCATION	500
EKWANOK SCHOLARSHIP TRUST PO BOX 467 MANCHESTER, VT 05254	NONE	EXEMPT	EDUCATION	500
FRIENDS OF JC HORMEL NATURE CENTER 1304 21ST STREET NE AUSTIN, MN 55912	NONE	EXEMPT	COMMUNITY	500
HABITAT FOR HUMANITY 115 E WATKINS PHOENIX, AZ 85004	NONE	EXEMPT	COMMUNITY	500
HARVARD BUSINESS SCHOOL SOLDIERS FIELD BOSTON, MA 02163	NONE	EXEMPT	EDUCATION	500
HISTORIC ARNOLDS PARK 37 LAKE STREET ARNOLDS PARK, IA 51331	NONE	EXEMPT	COMMUNITY	250
HORMEL FOUNDATION 329 NORTH MAIN STREET SUITE 102L AUSTIN, MN 559123478	NONE	EXEMPT	HEALTH	20,000
Total				505,144

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
KJZZ 2323 WEST 14TH STREET TEMPE,AZ 85281	NONE	EXEMPT	COMMUNITY	100
LAS FAMILIAS DEL PUEBLO 307 E 7TH ST LOS ANGELES,CA 90014	NONE	EXEMPT	COMMUNITY	250
MARCH OF DIMES 1275 MAMARONECK AVENUE WHITE PLAINS,NY 10605	NONE	EXEMPT	SCIENCE	250
MAYO CLINIC 200 FIRST ST SW ROCHESTER,MN 55905	NONE	EXEMPT	SCIENCE	50,000
MUSICAL INSTRUMENT MUSEUM 4725 E MAYO BLVD PHOENIX,AZ 85050	NONE	EXEMPT	EDUCATION	1,000
NATIONAL MULTIPLE SCLEROSIS SOCIETY PO BOX 4527 NEWYORK,NY 10163	NONE	EXEMPT	HEALTH	250
OKOBOJI FOUNDATION PO BOX 593 OKOBOJI,IA 51355	NONE	EXEMPT	COMMUNITY	5,000
OPPORTUNITY INTERNATIONAL 2122 YORK RD 340 OAK BROOK,IL 60523	NONE	EXEMPT	COMMUNITY	26,800
PACELLI CATHOLIC SCHOOLS 311 4TH ST NW AUSTIN,MN 55912	NONE	EXEMPT	EDUCATION	500
PINE HILL COMMUNITY SCHOOL ASSOCIATION 10 PINE HILL LANE SHERBORN,MA 01770	NONE	EXEMPT	EDUCATION	2,500
POTACH FOUNDATION 2217 17TH ST SE AUSTIN,MN 55912	NONE	EXEMPT	MEDICAL	5,000
RILEY RINK ANNUAL FUND PO BOX 835 MANCHESTER CENTER,VT 05255	NONE	EXEMPT	COMMUNITY	100
RONALD MCDONALD HOUSE ONE KROC DRIVE OAK BROOK,IL 60523	NONE	EXEMPT	COMMUNITY	250
SALVATION ARMY-AUSTIN 409 ST AVE NE AUSTIN,MN 55912	NONE	EXEMPT	COMMUNITY	1,000
SALVATION ARMY-VALLEY OF THE SUN 2707 E VAN BUREN ST PHOENIX,AZ 85008	NONE	EXEMPT	COMMUNITY	1,000
Total				505,144

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SANTA CLARA PARENT'S FUND 500 EL CAMINO REAL SANTA CLARA,CA 95053	NONE	EXEMPT	EDUCATION	500
SHEPHERD OF THE HILLS UCCC 5524 E LAFAYETTE BLVD PHOENIX,AZ 85018	NONE	EXEMPT	RELIGIOUS	17,494
SHERBORN PLAYGROUND COMMITTEE PO BOX 818 SHERBORN,MA 01770	NONE	EXEMPT	COMMUNITY	10,000
THE EXPERIMENT IN INTERNATIONAL LIVING PO BOX 676 1 KIPLING ROAD BRATTLEVORO,VT 05302	NONE	EXEMPT	COMMUNITY	1,000
TRUSTEES OF HAMILTON COLLEGE 198 COLLEGE HILL RD CLINTON,NY 13323	NONE	EXEMPT	EDUCATION	86,100
UNICEF 125 MAIDEN LANE NEWYORK,NY 10038	NONE	EXEMPT	CHARITABLE	500
UNITED WAY OF MOWER COUNTY 301 NORTH MAIN ST AUSTIN,MN 55912	NONE	EXEMPT	COMMUNITY	5,000
USSGA MEMORIAL FUND 88 FIELD POINT RD GREENWICH,CT 06830	NONE	EXEMPT	COMMUNITY	500
WASUSA PO BOX 621023 LITTLETON,CO 80162	NONE	EXEMPT	COMMUNITY	500
WELLESLEY COLLEGE 106 CENTRAL ST WELLESLEY,MA 02481	NONE	EXEMPT	EDUCATION	252,500
WOUNDED WARRIOR PROJECT 4899 BELFORT ROAD SUITE 300 JACKSONVILLE,FL 32256	NONE	EXEMPT	MILITARY	500
Total			3a	505,144

TY 2015 Accounting Fees Schedule

Name: JW JOHNSON FAMILY
CHARITABLE TRUST
EIN: 20-7203295

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREP FEE	4,995	2,497		2,498

TY 2015 Investments Corporate Stock Schedule

Name: JW JOHNSON FAMILY
CHARITABLE TRUST
EIN: 20-7203295

Name of Stock	End of Year Book Value	End of Year Fair Market Value
3 M COMPANY	3,606	8,586
ABBVIE INC	12,498	12,914
ALLIANZ AG-ADR	6,363	6,680
AMERICAN INTERNATIONAL	17,767	20,698
BANK OF AMERICA	18,426	17,857
BB&T	19,022	18,792
BP AMOCO PLC	20,222	13,286
CANON INC ADR	18,817	15,788
CISCO SYSTEMS	18,671	23,055
CITIGROUP	12,874	23,857
COCA-COLA CO	6,291	12,716
EATON CORP PLC	12,135	12,542
ENI S P A	23,933	18,327
ERSTE BANK DER OSTERRECHISCHEN	12,597	15,859
EXXON MOBIL CORP COM	7,522	8,497
FEDERATED INVESTORS	12,744	15,041
FOMENTO ECONOMICO MEX	18,460	20,132
GENERAL ELECTRIC	19,332	23,892
GLAXO SMITHKLINE PLC ADR	23,129	21,022
HEWLETT-PACKARD CO	3,779	6,034
HP INC	3,390	4,700
IBM CORP	19,599	17,340
ING GROUP NV SPONSORED ADR	18,989	18,467
INTEL CORP	11,695	21,772
INTESA SANPAOLO ADR	18,388	21,455
JOHNSON & JOHNSON	18,554	23,523
JPMORGAN CHASE & CO	15,209	22,120
KIMBERLY-CLARK CORP	5,679	12,730
KONINKLIKE PHILIPS ELECTRIC N.V.	18,474	17,993
LAS VAGAS SANDS CORP	18,872	19,421

Name of Stock	End of Year Book Value	End of Year Fair Market Value
MICROSOFT CORPORATION	9,432	18,752
PHILIP MORRIS INTERNATIONAL	14,397	18,637
SEIMENS AG SPONSORED ADR	21,834	18,258
SUN LIFE FINANCIAL	13,727	15,163
UNILEVER PLC ADR	11,544	12,505
WELLS FARGO & COMPANY	8,732	13,318

TY 2015 Investments - Other Schedule

Name: JW JOHNSON FAMILY
CHARITABLE TRUST
EIN: 20-7203295

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
ALLIANCEBERNSTEIN GLOBAL BOND FUND INC	AT COST	32,040	30,539
BLACKROCK STRATEGIC INCOME OPPORTUNITIES	AT COST	209,923	199,084
BUFFALO MID CAP FUND	AT COST	78,608	67,372
BUFFALO SMALL CAP FUND #1444	AT COST	38,281	23,961
CAUSEWAY INTERNATL VALUE FUND INST #1271	AT COST	285,982	247,086
CHAMPLAIN SMALL CO FD-ADV	AT COST	59,615	67,835
DIAMOND HILL LARGE CAP FD	AT COST	200,040	199,442
DODGE & COX STOCK FUND #145	AT COST	114,681	118,532
ECOLAB INC	AT COST	1,635,865	4,716,459
ETFS PALLADIUM TRUST	AT COST	27,927	20,585
ETFS PLATINUM TRUST	AT COST	54,977	39,482
FAMOUS DAVE'S OF AMERICA	AT COST	88,769	138,800
FMI COMMON STOCK FUND	AT COST	47,367	44,761
FPA NEW INCOME INC FUND	AT COST	248,620	239,008
HARBOR MID CAP VALUE FUND #023	AT COST	51,906	83,104
HARDING LOEVNER EMERG MKTS	AT COST	112,160	93,360
ISHARES MSCI EAFE INDEX FUND	AT COST	134,669	128,186
ISHARES MSCI EMERGING MARKET	AT COST	74,099	53,950
ISHARES MSCI EMU	AT COST	49,595	43,800
ISHARES RUSSELL MIDCAP INDEX	AT COST	49,277	44,850
ISHARES S&P PREF STK INDX FN	AT COST	50,232	48,563
ISHARES SILVER TRUST	AT COST	27,969	22,687
ISHARES TRUST RUSSELL 2000	AT COST	59,932	72,302
JENSEN PORTFOLIO CL I	AT COST	145,120	148,329
MANNING & NAPIER WORLD OPPORTUNITIES FUND	AT COST	20,780	16,485
MARSICO FOCUS FUND #40	AT COST	112,530	93,055
OAKMARK INTERNATIONAL FUND (HARRIS) #109	AT COST	258,120	233,660
ROYCE PREMIER FUND	AT COST	87,200	63,331
RS GLOBAL NATURAL RESOURCE # 1474	AT COST	236,379	100,335
RS VALUE FUND - A	AT COST	151,427	153,084

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
SCOUT UNCONSTRAINED BOND-Y	AT COST	56,120	53,411
SPDR GOLD TRUST	AT COST	73,504	64,934
T ROWE PRICE INSTITUTIONAL FLOATING RATE	AT COST	135,256	132,045
T ROWE PRICE INTERNATIONAL BOND # 76	AT COST	68,756	58,442
T ROWE PRICE MID-CAP GROWTH #64	AT COST	120,256	147,336
THORNBURG THORNBURG INTL VALUE CL A	AT COST	90,080	75,606
TWEEDY BROWNE GLOBAL VALUE FUND #1	AT COST	203,080	193,252
USAA PRECIOUS METALS AND MINERALS FUND	AT COST	18,800	4,717
VANGUARD ENERGY FUND INVESTOR SHS #51	AT COST	71,620	152,300
VANGUARD TOTAL BOND MARKET INDEX INV #84	AT COST	45,840	44,422

TY 2015 Other Expenses Schedule

Name: JW JOHNSON FAMILY
CHARITABLE TRUST
EIN: 20-7203295

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOUNDATION & OTHER EXPENSES	1,125	303		302

TY 2015 Other Liabilities Schedule

Name: JW JOHNSON FAMILY
CHARITABLE TRUST
EIN: 20-7203295

Description	Beginning of Year - Book Value	End of Year - Book Value
DEPOSITS IN TRANSIT	51,500	0

TY 2015 Other Professional Fees Schedule

Name: JW JOHNSON FAMILY
CHARITABLE TRUST
EIN: 20-7203295

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MGT FEES	16,062	16,062		0

TY 2015 Taxes Schedule**Name:** JW JOHNSON FAMILY

CHARITABLE TRUST

EIN: 20-7203295

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES PAID	520	520		0
2014 990-PF TAX ESTIMATE	26,000	0		0
2015 990-PF TAX ESTIMATE	34,000	0		0

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 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 2015
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Name of the organization JW JOHNSON FAMILY CHARITABLE TRUST	Employer identification number 20-7203295
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Organization type (check one)

Filers of: Form 990 or 990-EZ Form 990-PF	Section: ☐ 501(c)() (enter number) organization ☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation ☐ 527 political organization ☒ 501(c)(3) exempt private foundation ☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation ☐ 501(c)(3) taxable private foundation
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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 other 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 33¹/₃% 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 Do not 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 is not covered by the General Rule and/or the Special Rules does not 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 990PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Name of organization JW JOHNSON FAMILY CHARITABLE TRUST	Employer identification number 20-7203295
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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	JOEL AND ELIZABETH JOHNSON	\$ 20,504	Person ☒
	10813 EAST WINDGATE PASS DRIVE		Payroll ☐
	SCOTTSDALE, AZ 85255		Noncash ☒ (Complete Part II for noncash contributions)
2	JOEL AND ELIZABETH JOHNSON	\$ 45,323	Person ☒
	10813 EAST WINDGATE PASS DRIVE		Payroll ☐
	SCOTTSDALE, AZ 85255		Noncash ☒ (Complete Part II for noncash contributions)
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)

Name of organization JW JOHNSON FAMILY CHARITABLE TRUST	Employer identification number 20-7203295
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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	2,563 SHARES LIFE TIME FITNESS	\$ 181,973	2015-03-31
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
2	890 SHARES ECOLAB	\$ 100,441	2015-12-14
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	

Name of organization JW JOHNSON FAMILY CHARITABLE TRUST	Employer identification number 20-7203295
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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.) ▶ \$ _____

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