Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶ Do not enter social security numbers on this form as it may be made public.

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

OMB No. 1545-0052

2015

Open to Public Inspection

For calendar year 2015 or tax year beginning , 2015, and ending , 20

Name of foundation: SAM PRICE FAMILY FOUNDATION

A Employer identification number: 30-0086435

Number and street (or P.O. box number if mail is not delivered to street address): c/o Kimberly S. Zellmer, 11150 Overbrook Rd

Room/suite: Ste.350

B Telephone number (see instructions): (913) 236-6868

City or town, state or province, country, and ZIP or foreign postal code: Leawood, KS 66211

C If exemption application is pending, check here ▶ ☐

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

D 1. Foreign organizations, check here . . . ▶ ☐

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

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

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

I Fair market value of all assets at end of year *(from Part II, col. (c), line 16)* ▶ $ 9,139,268

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

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

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

	Line	Description	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc., received (attach schedule)	622,559			
	2	Check ▶ ☐ if the foundation is **not** required to attach Sch. B				
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	313,916	313,916		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	175,846			
	b	Gross sales price for all assets on line 6a 1,871,152				
	7	Capital gain net income (from Part IV, line 2) . .		175,846		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less: Cost of goods sold . . .				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)				
	12	**Total.** Add lines 1 through 11	1,112,321	489,762		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc.	49,776	24,888		24,888
	14	Other employee salaries and wages	26,802	13,401		13,401
	15	Pension plans, employee benefits	5,858	2,929		2,929
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)				
	c	Other professional fees (attach schedule)				
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	4,500	0		0
	19	Depreciation (attach schedule) and depletion . .				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)	133	0		0
	24	**Total operating and administrative expenses.** Add lines 13 through 23	87,069	41,218		41,218
	25	Contributions, gifts, grants paid	401,500			401,500
	26	**Total expenses and disbursements.** Add lines 24 and 25	488,569	41,218		442,718
	27	Subtract line 26 from line 12:				
	a	**Excess of revenue over expenses and disbursements**	623,752			
	b	**Net investment income** (if negative, enter -0-) .		448,544		
	c	**Adjusted net income** (if negative, enter -0-) . .				

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Part II	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)	Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets				
1	Cash—non-interest-bearing			
2	Savings and temporary cash investments	73,026	193,462	193,462
3	Accounts receivable ▶ Less: allowance for doubtful accounts ▶			
4	Pledges receivable ▶ Less: allowance for doubtful accounts ▶			
5	Grants receivable			
6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
7	Other notes and loans receivable (attach schedule) ▶ Less: allowance for doubtful accounts ▶			
8	Inventories for sale or use			
9	Prepaid expenses and deferred charges			
10a	Investments—U.S. and state government obligations (attach schedule)			
b	Investments—corporate stock (attach schedule)	3,455,484	3,834,157	4,185,316
c	Investments—corporate bonds (attach schedule)	1,099,436	1,116,317	992,131
11	Investments—land, buildings, and equipment: basis ▶ Less: accumulated depreciation (attach schedule) ▶			
12	Investments—mortgage loans			
13	Investments—other (attach schedule)	3,379,100	3,347,206	3,768,377
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)	8,007,046	8,491,142	9,139,286
Liabilities				
17	Accounts payable and accrued expenses			
18	Grants payable			
19	Deferred revenue			
20	Loans from officers, directors, trustees, and other disqualified persons			
21	Mortgages and other notes payable (attach schedule)			
22	Other liabilities (describe ▶)			
23	**Total liabilities** (add lines 17 through 22)	0	0	
Net Assets or Fund Balances				
	Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.			
24	Unrestricted			
25	Temporarily restricted			
26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.			
27	Capital stock, trust principal, or current funds	8,007,046	8,491,142	
28	Paid-in or capital surplus, or land, bldg., and equipment fund			
29	Retained earnings, accumulated income, endowment, or other funds			
30	**Total net assets or fund balances** (see instructions)	8,007,046	8,491,142	
31	**Total liabilities and net assets/fund balances** (see instructions)			

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	8,007,046
2	Enter amount from Part I, line 27a	2	623,752
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	8,630,798
5	Decreases not included in line 2 (itemize) ▶ See statement attached	5	-139,656
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	8,491,142

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	Publicly traded securities held in UBS account	P		
b				
c				
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	1,871,152		1,695,288	175,846
b				
c				
d				
e				

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

	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a				
b				
c				
d				
e				

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 / If (loss), enter -0- in Part I, line 7 }	2	175,846
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 the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2014	378,951	8,980,353	0.04220
2013	316,059	7,783,116	0.04061
2012	262,660	6,475,715	0.04056
2011	250,553	5,835,203	0.04294
2010	172,776	4,883,962	0.03538

2	**Total** of line 1, column (d)	2	0.20168
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	0.04034
4	Enter the net value of noncharitable-use assets for 2015 from Part X, line 5	4	9,185,606
5	Multiply line 4 by line 3	5	370,513
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	4,485
7	Add lines 5 and 6	7	374,998
8	Enter qualifying distributions from Part XII, line 4	8	442,718

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter: ________ (attach copy of letter if necessary—see instructions)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☑ and enter 1% of Part I, line 27b	1	4,485	00
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2		
3	Add lines 1 and 2	3	4,485	00
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4		
5	**Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-	5	4,485	00
6	Credits/Payments:			
a	2015 estimated tax payments and 2014 overpayment credited to 2015 — 6a — 6,266 00			
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	6,266	00
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	1,781	00
11	Enter the amount of line 10 to be: **Credited to 2016 estimated tax** ▶ 1,781 00 **Refunded** ▶	11	0	00

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		✓
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)?	1b		✓
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		✓
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation. ▶ $ 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		✓
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		✓
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		✓
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		✓
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	✓	
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	✓	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ Kansas			
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	✓	
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		✓
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10	✓	

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

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		✓
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		✓
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	✓	

Website address ▶ *None*

14 The books are in care of ▶ Kimberly S. Zellmer, Zellmer Law Firm, LLC Telephone no. ▶ 913-236-6868

Located at ▶ 11150 Overbrook Rd, Ste. 350, Leawood, KS ZIP+4 ▶ 66211

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 | 0

			Yes	No
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?	16		✓
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ▶			

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

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

			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)?	1b		✓
	Organizations relying on a current notice regarding disaster assistance check here ▶☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2015?	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)):			
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? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015.)*	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		✓
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		✓

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required *(continued)*

		Yes	No
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**		✓
	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	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Barry D. Price P.O. Box 12067, Shawnee Mission, KS 66282	Managing Trustee/ part-time	49,776	0	0
Peggy J. Price P.O. Box 12067, Shawnee Mission, KS 66282	Trustee	0	0	0
Donna Price P.O. Box 12067, Shawnee Mission, KS 66282	Trustee	0	0	0

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

(a) Name and address of each employee paid more than $50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over $50,000 ▶				0

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

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

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over $50,000 for professional services ▶		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 NONE	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 NONE	
2	
All other program-related investments. See instructions.	
3	
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	6,537,223
b	Average of monthly cash balances	1b	177,616
c	Fair market value of all other assets (see instructions)	1c	2,610,650
d	**Total** (add lines 1a, b, and c)	1d	9,325,488
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) . . . 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	9,325,488
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	139,882
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	9,185,606
6	**Minimum investment return.** Enter 5% of line 5	6	459,280

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	459,280
2a	Tax on investment income for 2015 from Part VI, line 5	2a	4,485		
b	Income tax for 2015. (This does not include the tax from Part VI.)	2b			
c	Add lines 2a and 2b			2c	4,485
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	454,795
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	454,795
6	Deduction from distributable amount (see instructions)			6	
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1			7	454,795

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	442,718
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	442,718
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	4,485
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	438,233

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				454,795
2	Undistributed income, if any, as of the end of 2015:				
a	Enter amount for 2014 only			406,406	
b	Total for prior years: 20___,20___,20___		0		
3	Excess distributions carryover, if any, to 2015:				
a	From 2010				
b	From 2011				
c	From 2012				
d	From 2013				
e	From 2014				
f	**Total** of lines 3a through e	0			
4	Qualifying distributions for 2015 from Part XII, line 4: ▶ $ 442,718				
a	Applied to 2014, but not more than line 2a			406,406	
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				36,312
e	Remaining amount distributed out of corpus	0			
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	0			
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 2015. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2016				418,483
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)	0			
9	**Excess distributions carryover to 2016.** Subtract lines 7 and 8 from line 6a	0			
10	Analysis of line 9:				
a	Excess from 2011				
b	Excess from 2012				
c	Excess from 2013				
d	Excess from 2014				
e	Excess from 2015				

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2015, enter the date of the ruling . . . . . . ▶

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

	Tax year	Prior 3 years			
	(a) 2015	(b) 2014	(c) 2013	(d) 2012	(e) Total
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test—enter: (1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test—enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the foundation had $5,000 or more in assets at any time during the year—see instructions.)

1 **Information Regarding Foundation Managers:**

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

None

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

None

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

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

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

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

c Any submission deadlines:

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

Part XV Supplementary Information *(continued)*

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
SEE SCHEDULE ATTACHED				
Total ▶ **3a**				401,500
b *Approved for future payment*				
NONE				
Total ▶ **3b**				0

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions.)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	313,916	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	175,846	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue: a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)					

13 Total. Add line 12, columns (b), (d), and (e) . . . 13 489,762

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

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)
	N/A

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

		Line	Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of:			
	(1) Cash	1a(1)		✓
	(2) Other assets	1a(2)		✓
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		✓
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		✓
	(3) Rental of facilities, equipment, or other assets	1b(3)		✓
	(4) Reimbursement arrangements	1b(4)		✓
	(5) Loans or loan guarantees	1b(5)		✓
	(6) Performance of services or membership or fundraising solicitations	1b(6)		✓
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		✓

d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.

(a) Line no.	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☑ No

b If "Yes," complete the following schedule.

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

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

[signature] | 5-16-16 | Managing Trustee

Signature of officer or trustee | Date | Title

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

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☑ if self-employed	PTIN
Kimberly S. Zellmer	Kimberly S. Zellmer	5-16-16		P01218330
Firm's name ► Zellmer Law Firm, LLC			Firm's EIN ►	20-8241638
Firm's address ► 11150 Overbrook Road, Ste. 350, Leawood, KS 66211			Phone no.	913-236-6868

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	**Schedule of Contributors** ▶ Attach to Form 990, Form 990-EZ, or Form 990-PF. ▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at *www.irs.gov/form990.*	OMB No. 1545-0047 **2015**

Name of the organization	Employer identification number
SAM PRICE FAMILY FOUNDATION	30-0086435

Organization type (check one):

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

Check if your organization is covered by the **General Rule** or a **Special Rule.**

Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

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

Special Rules

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

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

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than $1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. 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 990-PF, 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: SAM PRICE FAMILY FOUNDATION

Employer identification number: 30-0086435

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	Sam Price Charitable Lead Annuity Trust, Barry Price, Trustee P.O. Box 12067 Shawnee Mission, KS 66282	$ 622,559	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.)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

Name of organization	Employer identification number

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	SEE STATEMENT ATTACHED	$ 622,559	

(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
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

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PART I, line 1 (a) CONTRIBUTIONS, GIFTS, GRANTS RECEIVED

Contributor	Type of Contribution	Amount
Sam Price Charitable Lead Annuity Trust Barry Price, Trustee P.O. Box 12067 Shawnee Mission, KS 66282	Cash Securities	$311,761 $310,798
Total to 990-PF, Part I, line 1 (a)		$622,559

PART I, line 13 COMPENSATION OF TRUSTEE

Description	(a) Expenses Per Books	(b) Net Invest-ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Management Fee for 2015 Paid to Barry Price	$49,776	$24,888	0	$24,888

Part I, line 15 PENSION PLANS, EMPLOYEE BENEFITS

Description	(a) Expenses Per Books	(b) Net Invest-ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Employer Payroll Taxes	$5,858	$2,929	0	$2,929

Part I, line 18 TAXES

Description	(a) Expenses Per Books	(b) Net Invest-ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
2015 Excise Tax Estimated payments	4,500	0	0	0
Total	4,500	0	0	0

Part I, line 23 OTHER EXPENSES

Description	(a) Expenses Per Books	(b) Net Invest-ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Office supplies	$133	0	0	0

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PART II, line 2 SAVINGS AND TEMPORARY CASH INVESTMENTS

(a) Description	(b) Book Value	(c) Fair Market Value
UBS Money Market Account	$ 193,462	$ 193,462
TOTAL TEMPORARY CASH INVESTMENTS	**$ 193,462**	**$ 193,462**

PART II, line 10b INVESTMENTS - CORPORATE STOCK

(a) Description	(b) Book Value	(c) Fair Market Value
Stock:		
2,000 sh. AKAMAI TECHNOLOGIES INC. (AKAM)	123,637	105,260
2,000 sh. ALTRIA GROUP INC (MO)	58,019	116,420
4,000 sh. ASTRAZENECA PLC SPON ADR (AZN)	94,820	135,800
200 sh. BERKSHIRE HATHAWAY INC (BRK.B)	26,704	26,408
600 sh. BOEING CO (BA)	92,503	86,754
1,000 sh. BP PLC SPON ADR (BP)	42,350	31,260
1,000 sh. BRISTOL MYERS SQUIBB CO (BMY)	68,422	68,790
200 sh. CELGENE CORP (CELG)	24,382	23,952
2,000 sh. CERNER CORP (CERN)	76,775	120,340
4,000 sh. CISCO SYSTEMS INC. (CSCO)	91,044	108,620
1,000 sh. COCA COLA CO (KO)	41,817	42,960
1,000 sh. COLGATE PALMOLIVE (CL)	64,057	66,620
500 sh. COSTCO WHOLESALE (COST)	37,795	80,750
1,000 sh. DOW CHEMICAL (DOW)	51,215	51,480
2,000 sh. EPR PROPERTIES REIT (EPR)	75,230	116,900
1,000 sh. FISERV INC (FISV)	58,195	91,460
5,000 sh. FRONTIER COMMUNICATIONS CORP (FTR)	18,739	23,350
2,000 sh. GARMIN LTD (GRMN)	72,220	74,340
3,000 sh. GENERAL ELECTRIC (GE)	78,189	93,450
1,000 sh. GENUINE PARTS CO (GPC)	52,050	85,890
1,000 sh. INTEL CORP (INTC)	21,179	34,450
1,000 sh. JOHNSON & JOHNSON (JNJ)	75,497	102,720
2,000 sh. MICROSOFT CORP (MSFT)	69,880	110,960
1,000 sh. PFIZER INC. (PFE)	17,420	32,280
2,000 sh. QUALCOMM INC (QCOM)	125,684	99,970
300 sh. ROCKWELL AUTOMATION INC. (ROK)	33,586	30,783
2,000 sh. TOTAL S.A. FRANCE SPON ADR (TOT)	103,122	89,900
3,000 sh. TRINITY INDUSTRIES (TRN)	121,779	72,060
1,000 sh. UNITED PARCEL SERVICE INC CL B (UPS)	69,709	96,230
1,000 sh. UNITED RENTALS INC (URI)	77,367	72,540
3,000 sh. WHOLE FOODS MARKET INC (WFM)	113,616	100,500
2,000 sh. YAHOO (YHOO)	76,611	66,520
Total Stocks	2,153,613	2,459,717

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PART II, line 10b INVESTMENTS - CORPORATE STOCK

(a) Description	(b) Book Value	(c) Fair Market Value
Stock Mutual Funds:		
6,589.947 ALGER SPECTRA FUND CL C (ASPCX)	94,415	105,505
14,731.475 AMERICAN CENTURY EQ INC FUND C(AEYIX)	127,581	117,262
7,876.938 COLUMBIA SEL LRG CAP GR FD C (ELGCX)	132,822	120,990
7,791.474 DEUTSCHE GLOBAL INFRA.FD	97,857	97,549
1,989.610 DEUTSCHE CROCI INTL FUND	87,451	82,887
13,153.911 FT FRANKLIN UTILITIES C (FRUSX)	188,094	201,912
1,362.201 FRANKLIN DYNATECH C	53,657	57,512
8,570.625 HARTFORD DIVID. & GROWTH FUND (HDGCX)	167,731	186,754
7,370.642 IVY DIVIDEND INC FUND C	138,132	126,038
10,417.716 LORD ABBETT VALUE OPPORT. FUND (LVOCX)	155,536	168,975
3,460.202 MAINSTAY EPOCH GLOBAL EQ YLD FD (EPSKX)	59,296	58,443
2,567.175 MFS UTILITIES FD C	56,902	43,000
8,407.132 OPPENHEIMER RISING DIVID. FUND (OCRDX)	125,114	135,271
7,244.708 PIONEER EQUITY INC FUND (PCEQX)	195,956	223,499
Total Stock Mutual Funds	1,680,544	1,725,599
TOTAL CORPORATE STOCKS	**$3,834,157**	**$4,185,316**

PART II, line 10c INVESTMENTS - CORPORATE BONDS

(a) Description	(b) Book Value	(c) Fair Market Value
100,000 US STEEL CORP PUT BOND 7.00% 02/01/18	96,731	69,000
100,000 NOKIA CORP B/E 5.375% 05/15/19	100,414	106,015
100,000 GENWORTH FINANCIAL INC 7.7% 06/15/20	92,297	94,000
100,000 ADVANCED MICRO DEVICES 7.75% 08/01/30	100,741	68,500
100,000 CHESAPEAKE ENERGY CORP 6.625% 08/15/20	98,105	29,000
50,000 GENWORTH 7.2% 02/15/21	49,462	41,661
150,000 BEST BUY B/E 5.5% 03/15/21	145,145	155,250
100,000 CENTURYLINK INC NTS 6.45% 06/15/21	102,661	97,500
100,000 MOTOROLA SOLUTIONS INC 4.0% 09/01/24	90,264	86,782
150,000 ALBERTSONS INC 7.45% 08/01/29	126,187	132,750
Total Bonds:	$1,002,007	$880,458
Bond Funds:		
10,916.246 PACIFIC LIFE INCOME FUND (PLNCX)	114,310	111,673
TOTAL CORPORATE BONDS	**$1,116,317**	**$992,131**

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PART II, line 13 OTHER INVESTMENTS

(a) Description	(b) Book Value	(c) Fair Mkt Value
Annuities:		
METLIFE INVESTORS Policy No. 1100108713	500,000	756,514
HARTFORD LIFE INS Policy No. 711522374	500,000	806,877
PRUCO LIFE INS Policy No. E0971389	627,104	613,952
JACKSON NATIONAL Contract No. 1010566084	327,252	332,100
Total Annuities	$1,954,356	$2,509,443
Mutual Funds:		
500.000 PROSHARES ULTRASHORT S&P500 EFT(SDS)	29,333	9,965
8,859.273 MAINSTAY MARKETFIELD FUND C (MFCDX)	150,029	127,839
10,384.944 LORD ABBETT DIVERS INC STRAT (ISFCX)	152,181	142,481
5,936.386 OPPENHEIMER CAPITAL INC FD (OPECX)	53,190	54,259
9,178.207 PIMCO DIVID & INC BUILDER FD PQICX)	101,691	90,956
9,016.837 PRINCIPAL GLOBAL DIV INC FD (PGDCX)	115,428	117,039
	601,852	542,539
Unit Invest. Trusts:		
7,235 sh. UNTS AAM DOW TEN PRTFO	71,507	66,707
7,302 sh. UNTS AAM DIV INC VAL STRGY PORT	72,251	70,975
13,053 sh. UNTS AAM HI 50 DIV STRGY	128,966	117,347
7,035 sh. UNTS AAM DIV RULER PORT	69,582	62,893
6,986 sh. UNTS FT FIRST TR ETF ALLOC PORT	70,994	66,786
15,714 sh. UNTS FT HI DIV EQPORT SER 12	153,027	142,055
10,079 sh. UNTS FT SABRIENT BAKER S DOZ PORT	100,251	91,114
12,663 sh. UNTS AAM INFLATION INC STRATEGY	124,420	98,518
	790,998	716,395
TOTAL OTHER INVESTMENTS	**$3,347,206**	**$3,768,377**

PART III, line 5 DECREASES IN NET ASSETS OR FUND BALANCES

Adjustment for securities contributed at FMV	-40,328
Write off of 100,000 BOWATER CANADA DEFAULTED BOND	-99,328
Total	-139,656

PART VII-A, line 10 SUBSTANTIAL CONTRIBUTORS

Contributor	Type of Contribution	Amount
Sam Price Charitable	Cash	$311,761
Lead Annuity Trust	Securities	$310,798
Barry Price, Trustee		
P.O. Box 12067		$622,559
Shawnee Mission, KS 66282		

PART VII-B, line 5c EXPENDITURE RESPONSIBILITY

The Foundation made a grant to a nonprofit organization which is not a 501(c)(3) organization and exercised expenditure responsibility over the grant. The following information is provided in compliance with the requirements of Regulations section 53.4945-5(d)(2):

Grantee Name/Address:

Colorado Springs Education Assn
Attn: Kevin Vick, President
2520 N Tejon, Ste 100
Colorado Springs, CO 80907

Date/Amount of Grant:

March 17, 2015 $5,000

Purpose of Grant:

The Colorado Springs Education Association is a 501(c)(5) organization which represents teachers in the Colorado Springs District 11 school district. The grant was awarded to provide funds for a two-day "Tuned-In" workshop in April 2015. The Tuned-In workshop is a Jungian-based exploration into how to harness music to assist in the healing of mind, body and spirit and is intended to give educators an opportunity to explore their own experiences and gain insight into the life challenges of themselves, their colleagues and students. Participants are provided tools to utilize music, both personally and with students, in a conscious new way to enhance state of mind, health and perspective in order to inspire a more satisfying personal life and a more productive education atmosphere. The workshop was attended by teachers from District 11 and partnering districts.

PART VII-B, line 5c EXPENDITURE RESPONSIBILITY (cont)

The amounts expended by the grantee (based upon the report received from the grantee)for the workshop:

Materials	$263.24
Room Fee	$200.00
Booklets	$122.92
Speaker Fee and postage	$4,224.50
Food	$1,143.50
Total	$5,954.16

The grantee utilized $954.16 of outside funds for the program and has not diverted any portion of the funds from the purpose of the grant (to the knowledge of the grantor).

The grantor received a report on May 13, 2016, from the grantee on the use of funds, goals and evaluation of the workshop.

PART XV, LINE 3 GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

Recipient	Foundation Status	Purpose	Amount
Jewish Community Foundation of Greater Kansas City 5801 W. 115th Street Overland Park, KS 66211	PC	Jewish Community Center	$50,000
YMCA of the Rockies 2515 Tunnel Road Estes Park, CO 80511	PC	Program grant	$40,000
Jewish Federation of Kansas City 5801 W. 115th St. Suite 201 Overland Park, Kansas 66211	PC	Sasone program to provide services to children with special needs	$ 5,000

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Recipient	Foundation Status	Purpose	Amount
John Austin Cheley Foundation 10565 Centennial Drive Alpharetta, GA 30022-7078	PC	Funds for summer camp for underprivileged children	$10,000
The Kansas City Symphony 1020 Central, Suite 300 Kansas City, MO 64105	PC	Operational grant	$ 5,500
Congregation B'Nai Jehudah 12320 Nall Avenue Overland Park, KS 66209	PC	Program grant	$15,000
Camp Rainbow Foundation 14309 Millbriar Circle Chesterfield, MO 63017	PC	Camp for seriously ill children	$ 4,300
Kansas City Hospice & Pallative Care 9221 Ward Parkway, Suite 100 Kansas City, MO 64114	PC	Operational grant	$ 3,000
KVC Behavioral HealthCare, Inc. 21350 W. 153rd Street Olathe, Kansas 66061-5413	PC	Program grant	$ 5,000
National Multiple Sclerosis Society - Mid America chapter 7611 State Line Road, Ste. 100 Kansas City, MO 64114	PC	Research and family support	$10,000
Children's Therapy Group Foundation 7620 Metcalf Avenue, Suite M Overland Park, KS 66204	PC	Scholarships for fund therapy services for children	$ 2,000
Robert E. Loup Jewish Community Center 21441 North Elbert Road Elbert, CO 80106	PC	JCC Ranch Camp equestrian program	$20,000

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PART XV, LINE 3 GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR - continued

Recipient	Foundation Status	Purpose	Amount
Scripps Health Foundation 4275 Campus Point Court San Diego, CA 92121-1513	PC	Support of hospice program	$20,000
Drive Smart Colorado 705 S. Nevada Ave. Colorado Springs, CO 80903	PC	Driver Safety Program	$ 5,000
American Cancer Society 1100 Pennsylvania Ave Kansas City, MO 64105	PC	Support of Hope Lodge	$ 5,000
Jewish Family Services of Greater Kansas City 5801 W. 115th Street, Ste 103 Overland Park, KS 66211	PC	Program grant	$ 7,000
American Heart Association 6800 W. 93rd Street Overland Park, KS 66212	PC	Operational grant	$ 5,000
Lamar Comm. College Foundation 2401 South Main Street Lamar, Colorado 81052	PC	Program grant	$20,000
Children's Hospital of Pittsburgh Foundation One Children's Hospital Drive 4401 Penn Avenue Pittsburgh, PA 15224	PC	Operational grant	$ 5,000
Ronald McDonald House Charities Kansas City, Inc. 2502 Cherry Street Kansas City, MO 64108	PC	Operational grant	$ 5,000

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PART XV, LINE 3 GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR - continued

Recipient	Foundation Status	Purpose	Amount
Wayside Waifs, Inc. 3901 Martha Truman Road Kansas City, MO 64137	PC	Operational grant	$ 4,000
KSDS, Inc. 124 W. 7th St. Washington, KS 66968	PC	Training for dogs to assist persons with disabilities	$ 8,000
City Union Mission 1100 E 11th St Kansas City, MO 64106	PC	Operational grant	$10,000
Kansas Public Radio 1120 West 11th Street Lawrence, KS 66044	PC	Operational grant	$ 4,000
The Salvation Army Kansas & Western Missouri Division 3637 Broadway Street Kansas City, MO 64111	PC	Operational grant	$25,000
Harvesters 3801 Topping Ave. Kansas City, MO 64129	PC	Operational grant	$10,000
Catholic Health Initiatives CHI National Foundation 6385 Corporate Drive, Ste. 301 Colorado Springs, CO 80919	PC	Program grant	$ 4,200
Fountain Valley School of Colorado 6155 Fountain Valley School Road Colorado Springs, CO 80911	PC	Program grant	$10,000

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PART XV, LINE 3 GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR - continued

Recipient	Foundation Status	Purpose	Amount
Civilian Military Community Foundation, Inc. 817 Dixon Blvd, Ste. 6B Cocoa, FL 32922	PC	Operational grant	$ 5,000
Wild Places Equine Rescue P.O. Box 5 Divide, CO 80814	PC	Operational grant	$12,000
Mello Memories, Inc. 6175 Burgess Rd Black Forest, CO 80908	PC	Operational grant	$10,000
Children's Mercy Hospital Found. 2401 Gillham Rd Kansas City, MO 64108	PC	Operational grant	$10,000
Teach & Learn Experientially (TLE) (Exchange City & Earthworks) P.O. Box 7114 Lee's Summit, MO 64064	PC	Program grant	$ 5,000
Gift of Life, Inc. 6405 Metcalf Ave, Suite 109 Overland Park, KS 66202	PC	Program grant	$ 7,500
Colorado Springs School Dist 11 1115 N. El Paso Street Colorado Springs, Colorado 80903	GOV	Program grant	$ 5,000
Colorado Springs Education Assn 2520 N Tejon, Ste 100 Colorado Springs, CO 80907	NC	Program grant	$ 5,000

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PART XV, LINE 3 GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR - continued

Recipient	Foundation Status	Purpose	Amount
Rocky Mt Adventist Health Care Foundation 7995 E Prentice Ave #204 Englewood, CO 80111	PC	Operational grant	$ 7,000
The Women's Resource Agency 750 Citadel Dr W # 3116 Colorado Springs, CO 80909	PC	Program grant	$ 5,000
Colorado Springs Fine Arts Center 30 W Dale St Colorado Springs, CO 80903	PC	Operational grant	$ 5,000
The Children's Place 2 E 59th St Kansas City, MO 64113	PC	Operational grant	$ 5,000
American Red Cross 211 W Armour Blvd Kansas City, MO 64111	PC	Operational grant	$ 3,000

TOTAL GRANTS AND CONTRIBUTIONS TO PART XV **$401,500**

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Date of Contribution		FMV at time of contribution
02/20/2015	1,325.346 sh FRANKLIN DYNATECH C	$56,579
02/20/2015	2,383.047 sh MFS UTILITIES FUND C	$51,378
03/05/2015	1,000 CISCO SYSTEMS INC	$29,300
06/05/2015	1,000 GENERAL ELECTRIC CO	$27,290
09/08/2015	150,000 ALBERTSONS INC	$146,250
10/08/2015	CASH	$311,761
	TOTAL CONTRIBUTION	$622,559