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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 THE MACDONALD FOUNDATION CO MARK AND DONNA MACDONALD		A Employer identification number 33-6269762	
Number and street (or P O box number if mail is not delivered to street address) 4201 North Lakeshore Drive		B Telephone number (see instructions) (310) 463-1744	
City or town, state or province, country, and ZIP or foreign postal code Wausau, WI 54401		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) \$ 10,826,975		J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)	

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		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)	1,026,616			
	2 Check ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	12	12		
	4 Dividends and interest from securities	304,252	304,252		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	7,788			
	b Gross sales price for all assets on line 6a 752,744				
	7 Capital gain net income (from Part IV, line 2) . . .		7,788		
	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)	-274			
	12 Total. Add lines 1 through 11	1,338,394	312,052		
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule).				
	b Accounting fees (attach schedule).	13,800	5,500		
	c Other professional fees (attach schedule)	5,440	5,440		
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	23,071	15,561		
	19 Depreciation (attach schedule) and depletion . .				
	20 Occupancy				
	21 Travel, conferences, and meetings.				
	22 Printing and publications				
	23 Other expenses (attach schedule).	9,411	8,611		
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	51,722	35,112		0
	25 Contributions, gifts, grants paid	603,759			603,759
	26 Total expenses and disbursements. Add lines 24 and 25	655,481	35,112		603,759
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	682,913			
	b Net investment income (if negative, enter -0-)		276,940		
	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	325,430	224,247	224,247
	2	Savings and temporary cash investments	949,176	1,528,980	1,528,980
	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)	1,537,617	1,578,832	1,516,220
	b	Investments—corporate stock (attach schedule)	7,862,814	7,807,463	7,262,648
	c	Investments—corporate bonds (attach schedule)	81,255	194,633	178,200
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans.			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)		96,344	116,680	
16	Total assets(to be completed by all filers—see the instructions Also, see page 1, item I)	10,756,292	11,430,499	10,826,975	
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	
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	10,756,292	11,430,499	
	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)	10,756,292	11,430,499		
31	Total liabilities and net assets/fund balances(see instructions)	10,756,292	11,430,499		

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	10,756,292
2	Enter amount from Part I, line 27a	2	682,913
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3	4	11,439,205
5	Decreases not included in line 2 (itemize) ▶ _____	5	8,706
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	11,430,499

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)
1a	See Additional Data Table			
b				
c				
d				
e				

(e) Gross sales price	Depreciation allowed (f) (or allowable)	Cost or other basis (g) plus expense of sale	Gain or (loss) (h) (e) plus (f) minus (g)
a See Additional Data Table			
b			
c			
d			
e			

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 (l) Losses (from col (h))
(i) F M V as of 12/31/69	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
a See Additional Data Table			
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	7,788
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	227,985	10,783,421	0 02114
2013	310,521	9,106,414	0 03410
2012	267,650	6,946,156	0 03853
2011	364,750	6,432,925	0 05670
2010	255,150	5,467,941	0 04666

2	Total of line 1, column (d).	2	0 197136
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 039427
4	Enter the net value of noncharitable-use assets for 2015 from Part X, line 5.	4	10,830,886
5	Multiply line 4 by line 3.	5	427,029
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	2,769
7	Add lines 5 and 6.	7	429,798
8	Enter qualifying distributions from Part XII, line 4.	8	603,759

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 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		1	2,769
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	2,769
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	2,769
6 Credits/Payments			
a 2015 estimated tax payments and 2014 overpayment credited to 2015	6a 9,090		
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	9,090
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	6,321
11 Enter the amount of line 10 to be Credited to 2015 estimated tax ☒ 6,321 Refunded ☒		11	

Part VII-A

Statements Regarding Activities

1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	Yes	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? <i>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.</i>	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 ☒ \$ _____ (2) On foundation managers ☒ \$ _____			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☒ \$ _____			
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>	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? <i>If "Yes," attach a conformed copy of the changes</i>	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		No
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>	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? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	7	Yes	
8a Enter the states to which the foundation reports or with which it is registered (see instructions): ☒ CA _____			
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? <i>If "No," attach explanation.</i>	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)? <i>If "Yes," complete Part XIV</i>	9		No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i> ☒	10	Yes	

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 ▶MARK MACDONALD Located at ▶4201 North Lakeshore Drive Wausau WI Telephone no ▶(877) 829-5500 ZIP+4 ▶54401			
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		No
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		No
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		No
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)?

☐ Yes ☒ No

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?

☐ Yes ☒ 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?

☐ Yes ☒ No

5b

No

6b

No

7b

No

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
MARK MACDONALD 1561 GATES AVE MANHATTAN BEACH, CA 90266	Trustee 1 00	0		
DONNA MARIE MACDONALD 1561 GATES AVE MANHATTAN BEACH, CA 90266	Trustee 1 00	0		
MATTHEW MACDONALD 8517 EXCELSIOR DRIVE MADISON, WI 53717	Trustee 0 00	0		

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

(a) Name and address of each employee paid more than \$50,000	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.

Part VIII

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services. ▶

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1	
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	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3. ▶	

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	9,506,531
b	Average of monthly cash balances.	1b	1,489,292
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	10,995,823
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	
3	Subtract line 2 from line 1d.	3	10,995,823
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	164,937
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	10,830,886
6	Minimum investment return. Enter 5% of line 5.	6	541,544

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	541,544
2a	Tax on investment income for 2015 from Part VI, line 5.	2a	2,769
b	Income tax for 2015 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	2,769
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	538,775
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	538,775
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	538,775

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	603,759
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	603,759
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions).	5	2,769
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	600,990

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				538,775
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only.				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2015				
a From 2010.				
b From 2011.	53,179			
c From 2012.				
d From 2013.				
e From 2014.				
f Total of lines 3a through e.	53,179			
4 Qualifying distributions for 2015 from Part XII, line 4				
a Applied to 2014, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2015 distributable amount.				538,775
e Remaining amount distributed out of corpus	64,984			
5 Excess distributions carryover applied to 2015 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	118,163			
b Prior years' undistributed income Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b Taxable amount—see instructions.				
e Undistributed income for 2014 Subtract line 4a from line 2a Taxable amount—see instructions.				
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).				
8 Excess distributions carryover from 2010 not applied on line 5 or line 7 (see instructions).				
9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a.	118,163			
10 Analysis of line 9				
a Excess from 2011.	53,179			
b Excess from 2012.				
c Excess from 2013.				
d Excess from 2014.				
e Excess from 2015.	64,984			

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 organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

☐ 4942(j)(3) or ☐ 4942(j)(5)

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 organization had \$5,000 or more in assets at any time during the year—see instructions.)

1

Information Regarding Foundation Managers:

a

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

See Additional Data Table

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

Form 990-PF (2015)

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	603,759
b Approved for future payment				
Total			3b	

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			14	12		
4 Dividends and interest from securities. . . .			14	304,252		
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.				274		
8 Gain or (loss) from sales of assets other than inventory						7,788
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). . .				303,990		7,788
13 Total. Add line 12, columns (b), (d), and (e).						
(See worksheet in line 13 instructions to verify calculations)						

[illegible]

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

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)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
Enterprise Products Partners	P	2012-01-01	2015-07-01
JP Morgan Capital Gains	P	2012-01-01	2015-07-01
JP morgan 1250 Gain	P	2012-01-01	2015-07-01
Publically traded securities	P	2012-01-01	2015-07-01
Publically traded securities	P	2015-01-01	2015-07-01
Publically traded securities	P	2012-01-01	2015-07-01

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
236			236
7,669			7,669
169			169
14,178			14,178
159,498		161,272	-1,774
570,994		583,684	-12,690

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			236
			7,669
			169
			14,178
			-1,774
			-12,690

Form 990PF Part XV Line 1a - 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).

MARK MACDONALD
DONNA MARIE MACDONALD

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				
ROLLING HILLS PREPARATORY SCHOOL 300A PASEO DEL MAR PALOS VERDES ESTATES,CA 90274	None	N/A	FOR SCHOLARSHIP FUND AND THE SCHOOL'S ANNUAL FUND	51,800
UNITED CEREBRAL PALSY 6430 INDEPENDENCE AVE WOODLAND HILLS,CA 91367	None	NonProfit	FOR PROGRAMS AND FACILITIES	25,900
BIG BROTHER BIG SISTER 2600 STEWART AVENUE SUITE 262 WAUSAU,WI 54401	None	N/A	MENTORING THE YOUTH IN THE WAUSAU COMMUNITY	17,500
AMERICAN CANCER SOCIETY 5731 W SLAUSON AVE STE 200 CULVER CITY,CA 90230	None	NonProfit	CANCER RESEARCH	20,000
BOYS GIRLS CLUB OF THE WAUSAU AREA PO BOX 2386 WAUSAU,WI 54402	None	NonProfit	SERVICES FOR YOUTH	20,000
MARSHFIELD CLINIC 1000 NORTH OAK AVE 1R1 MARSHFIELD,WI 54449	None	NonProfit	CATHERINE FONTI ANGEL FUND -BREAST CANCER PREVENTION & TREATMENT	12,500
MY FRIEND'S PLACE PO BOX 3867 HOLLYWOOD,CA 90078	None	NonProfit	SERVICES FOR HOMELESS YOUTH	10,000
UNION RESCUE MISSION 545 S SAN PEDRO ST LOS ANGELES,CA 90013	None	NonProfit	SERVICES FOR THE HOMELESS	200
LOS ANGELES MISSION 303 EAST 5TH STREET LOS ANGELES,CA 90013	None	NonProfit	NEEDS OF THE HOMELESS AND HUNGRY	200
WESTSIDE FOOD BANK 1710 22ND ST SANTA MONICA,CA 90404	None	NonProfit	FOR ASSISTANCE TO THE HOMELESS FOOD SHELTER	500
BOY SCOUTS OF AMERICA - SAMOSET COU 3511 CAMP PHILLIPS RD WESTON,WI 54476	None	NonProfit	Values based youth development	2,500
GOOD SHEPARD CENTER 1650 ROCKWOOD ST LOS ANGELES,CA 90026	None	NonProfit	FOR HOMELESS WOMEN AND CHILDREN	200
THE SALVATION ARMY 125 BERYL ST REDONDO BEACH,CA 90277	None	NonProfit	COMMUNITY SUPPORT FOR THE NEEDY	200
PANCREATIC CANCER ACTION NETWORK 1500 ROSECRANS AVE SUITE 200 MANHATTAN BEACH,CA 90266	None	NonProfit	ADVANCE RESEARCH & SUPPORT PATIENTS WHO ARE AFFECTED BY PANCREATIC CANCER	10,000
K-TECH CHARITIES INC 7710 TECHNOLOGY DRIVE WESTON,WI 54476	None	Charity	PROVIDED SUPPORT TO THE AREA'S NEEDY FAMILIES AND OTHER NON-PROFIT ORGS	5,000
Total				603,759

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>				
CHILDREN'S MIRACLE NETWORK 205 W 700 SOUTH SALT LAKE CITY,UT 84101	None	NonProfit	TO SUPPORT THE CHILDREN'S MIRACLE NETWORK MISSION IN PROVIDING BETTER & AFFORDABLE CARE FOR CHILDREN	8,000
MANHATTAN BEACH YOUTH ATHLETICS PO BOX 3512 MANHATTAN BEACH,CA 90266	None	NonProfit	ENCOURAGE & SUPPORT YOUTH BASEBALL	5,000
ASPIRUS HEALTH FOUNDAION 425 Pine Ridge Blvd Wausau,WI 54401		NonProfit	Support Hospice Care	1,800
LEWIS CLARK COLLEGE 0615 SW Palatine Hill Rd Portland,OR 97219		School	ENCOURAGE & SUPPORT ATHLETICS	5,000
CENTER FOR THE VISUAL ARTS 400 N 4th Street Wausau,WI 54403		NonProfit	SUPPORT LOCAL COMMUNITY OF ARTS	10,000
NEWMAN CATHOLIC SCHOOL 619 Stark Street Wausau,WI 54403		School	SUPPORT EDUCATION	10,000
NATIONAL PARKS CONSERVATION ASSOCIA 777 6th Street NW Washington,DC 20001		NonProfit	Support to defend and protect America's Pristine natural places	1,000
WAUSAU MARATHON COUNTY PARK DEPT 212 River Drive Wausua,WI 54403		Public	LIGHT DONATION	182,759
LONG BEACH RESCUE MISSION PO Box 1969 Long Beach,CA 90801		NonProfit	HELPING THE HOMELESS	200
EVEREST GRIDIRON ON THE GREEN 6500 ALDERSON ST SCHOLFIELD,WI 54476		NonProfit	provide supplemental financial support through charitable fundraising activities in order to assist the D C Everest football program in producing respectful, responsible, productive citizens	1,000
COMMUNITY FOUNDATION OF NORTHERN CE 500 FIRST STREET WAUSAU,WI 54403		NonProfit	Edgar Summary Baseball Fund	145,000
THE NEIGHBORS PLACE 745 SCOTT ST WAUSAU,WI 54403		NonProfit	to help people in need	3,000
MINISTRY SAINT CLARE'S HOSPITAL 3400 Ministry Parkway Weston,WI 54476		NonProfit	Funds help to provide programming to infants, childre and their fmailies	11,000
ST PIUS X ST MATTHIAS ACADEMY 7851 E GARDENDALE STREET DOWNEY,CA 90242	None		FOR SCHOLARSHIP FUND AND THE SCHOOL'S ANNUAL FUND	25,000
NORTHCENTRAL TECHNICAL COLLEGE FOUN 1000 WEST CAMPUS WAUSAU,WI 54401	None		FOR SCHOLARSHIP FUND AND THE SCHOOL'S ANNUAL FUND	500
Total				603,759

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>				
NORTH BEND PERSBYERIAN CHURCH 2238 PONY CREED ROAD NORTH BEND,OR 97459			Funds help to provide programming	1,000
ANGEL ON MY SHOULDER 1611 PINT TREE LN ST GERMAIN,WI 54558	None		Furthering the well-being of those affected by cancer through empowerment, enhancement of their quality of life, and the creation of hope for the future	5,000
WI AUTOMOTIVE AND TRUCK EDU ASSOC PO BOX 1542 Wausau,WI 54402			Charity	3,000
PEYTON'S PROMISE 3502 MAKENZIE DRIVE WESTON,WI 54476			HELP FIGHT THE HUNGER IN AMERICA	1,000
BLESSINGS IN A BACKPACK 4121 SHELBYVILLE RD LOUISVILLE,KY 40207			PROVIDE FOOD ON THE WEEKENDS FOR SCHOOL CHILDREN	1,500
EMPOWERED DREAM HUNTS 526 SANDY LANE MOSINEE,WI 54455			Help the specially-abled outdoor enthusiast living in the Wisconsin communities to overcome natures challenges, break barriers and develop friendships to fulfill a dream	500
ST VINCENT DE PAUL 131 WTHOMAS ST WAUSAU,WI 54401			service to individuals in need	1,000
ST ANNE PARISH 700 W BRIDGE STREET WAUSAU,WI 54401	None		helping people grow in the image of Christ	5,000
Total				603,759

TY 2015 Accounting Fees Schedule

Name: THE MACDONALD FOUNDATION
CO MARK AND DONNA MACDONALD

EIN: 33-6269762

Software ID: 15000324

Software Version: 2015v2.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Accounting Fees	13,800	5,500	0	0

TY 2015 Other Assets Schedule

Name: THE MACDONALD FOUNDATION
CO MARK AND DONNA MACDONALD

EIN: 33-6269762

Software ID: 15000324

Software Version: 2015v2.0

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
Boardwalk K-1 Ending Capital Balance		55,829	
Boardwalk K-1 FMV			39,940
Enterprise K-1 FMV			76,740
Enterprise K-1 Ending Capital Balance		40,515	

TY 2015 Other Decreases Schedule

Name: THE MACDONALD FOUNDATION
CO MARK AND DONNA MACDONALD

EIN: 33-6269762

Software ID: 15000324

Software Version: 2015v2.0

Description	Amount
Net Unrealized Gains or Losses on Investments	8,706

TY 2015 Other Expenses Schedule

Name: THE MACDONALD FOUNDATION
CO MARK AND DONNA MACDONALD

EIN: 33-6269762

Software ID: 15000324

Software Version: 2015v2.0

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Boardwalk Pipeline Partners - Bus loss	3,455	3,455		
Boardwalk Pipeline Partners - Cash Contr	7	7		
Enterprise Products Prtnrs - Bus Loss	4,307	4,307		
Membership Fees	75	75		
MISCELLANEOUS EXPENSES	767	767		
Non-deductible Contributions	800			

TY 2015 Other Income Schedule

Name: THE MACDONALD FOUNDATION
CO MARK AND DONNA MACDONALD

EIN: 33-6269762

Software ID: 15000324

Software Version: 2015v2.0

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Other Investment Income	-274		

TY 2015 Other Professional Fees Schedule

Name: THE MACDONALD FOUNDATION
CO MARK AND DONNA MACDONALD

EIN: 33-6269762

Software ID: 15000324

Software Version: 2015v2.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT EXPENSES	1,105	1,105	0	0
Investment Expenses - JP Morgan	4,335	4,335	0	0

TY 2015 Substantial Contributors Schedule

Name: THE MACDONALD FOUNDATION
CO MARK AND DONNA MACDONALD

EIN: 33-6269762

Software ID: 15000324

Software Version: 2015v2.0

Name	Address
Mark Macdonald	4201 North Lakeshore Drive Wausau, WI 54401
Donna Macdonald	4201 North Lakeshire Drive Wausau, WI 54401

TY 2015 Taxes Schedule

Name: THE MACDONALD FOUNDATION
CO MARK AND DONNA MACDONALD

EIN: 33-6269762

Software ID: 15000324

Software Version: 2015v2.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Estimated Tax Payments 2015	7,500			
Foreign Taxes	15,561	15,561		
Franchise Tax Board CA	10			