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: BLOCK-LEAVITT FOUNDATION

A Employer identification number: 36-7160637

Number and street (or P O box number if mail is not delivered to street address): 3002 CASCADIA AVE S

Room/suite:

B Telephone number (see instructions): ( ) -

City or town state or province country and ZIP or foreign postal code: SEATTLE, WA 98144

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: [X] 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) ▶ $ 1,080,085

J Accounting method: [X] 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))

		(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)				
	2 Check ▶ ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	1,113	1,113		ATCH 1
	4 Dividends and interest from securities	11,687	11,687		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	-39,656			
	b Gross sales price for all assets on line 6a 26,465				
	7 Capital gain net income (from Part IV line 2)		0		
	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) ATCH 2	5,003	5,003		
	12 **Total** Add lines 1 through 11	-21,853	17,803		
Operating and Administrative Expenses	13 Compensation of officers directors trustees etc	0			
	14 Other employee salaries and wages				
	15 Pension plans employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	3,675	3,675		
	c Other professional fees (attach schedule)				
	17 Interest ATCH 3	2	2		
	18 Taxes (attach schedule) (see instructions)	1,434	434		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel conferences and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule) ATCH 5	4,840	4,840		
	24 **Total operating and administrative expenses** Add lines 13 through 23	9,951	8,951		
	25 Contributions gifts grants paid	125,500			125,500
	26 **Total expenses and disbursements** Add lines 24 and 25	135,451	8,951	0	125,500
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-157,304			
	b **Net investment income** (if negative enter -0-)		8,852		
	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	44,934.	191.	191.
2	Savings and temporary cash investments			
3	Accounts receivable ▶ 142.			
	Less allowance for doubtful accounts ▶	3,061.	142.	141.
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) ATCH 6	524,050.	497,792.	489,747.
c	Investments - corporate bonds (attach schedule)			
11	Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
12	Investments - mortgage loans			
13	Investments - other (attach schedule) ATCH 7	609,319.	525,935.	590,006.
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)	1,181,364.	1,024,060.	1,080,085.
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. ▶ X			
27	Capital stock, trust principal, or current funds			
28	Paid-in or capital surplus, or land, bldg , and equipment fund			
29	Retained earnings, accumulated income, endowment, or other funds	1,181,364.	1,024,060.	
30	**Total net assets or fund balances** (see instructions)	1,181,364.	1,024,060.	
31	**Total liabilities and net assets/fund balances** (see instructions)	1,181,364.	1,024,060.	

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	1,181,364.
2	Enter amount from Part I, line 27a	2	-157,304.
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	1,024,060.
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,024,060.

Part IV Capital Gains and Losses for Tax on Investment Income

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

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

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

	(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	-39,657.
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6). If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	3	0.

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

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank.

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2014	117,062.	1,224,297.	0.095616
2013	148,188.	1,206,165.	0.122859
2012	104,335.	1,166,625.	0.089433
2011	119,726.	1,235,666.	0.096892
2010	99,311.	1,287,545.	0.077132

2	**Total** of line 1, column (d)	2	0.481932
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	0.096386
4	Enter the net value of noncharitable-use assets for 2015 from Part X, line 5	4	1,134,107.
5	Multiply line 4 by line 3	5	109,312.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	89.
7	Add lines 5 and 6	7	109,401.
8	Enter qualifying distributions from Part XII, line 4	8	125,500.

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	89.
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	89.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	0.
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-	5	89.
6	Credits/Payments		
a	2015 estimated tax payments and 2014 overpayment credited to 2015 . . . . 6a 2,722.		
b	Exempt foreign organizations - tax withheld at source 6b		
c	Tax paid with application for extension of time to file (Form 8868) . . . . 6c 2,000.		
d	Backup withholding erroneously withheld 6d		
7	Total credits and payments Add lines 6a through 6d	7	4,722.
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	4,633.
11	Enter the amount of line 10 to be **Credited to 2016 estimated tax** ▶ 4,633. **Refunded** ▶	11	

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)?	1b		X
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ▶ $ ______ (2) On foundation managers ▶ $ ______			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ ______			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		X
	If "Yes," attach a detailed description of the activities.			
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b	X	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		X
	If "Yes," attach the statement required by General Instruction T			
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col (c), and Part XV*	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ WA,			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G? If "No," attach explanation*	8b	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)? *If "Yes," complete Part XIV*	9		X
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		X

Part VII-A Statements Regarding Activities (continued)

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

Website address ▶ N/A

14 The books are in care of ▶ WILLIAM H. BLOCK Telephone no ▶ 206-760-9038
Located at ▶ 3002 CASCADIA AVE. S. SEATTLE, WA ZIP+4 ▶ 98144

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here ▶ ☐
and enter the amount of tax-exempt interest received or accrued during the year ▶ 15

			Yes	No
16	At any time during calendar year 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		X
	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	N/A	
	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		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 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 ▶ ____, ____, ____, ____			
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		X
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ ____, ____, ____, ____			
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	N/A	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2015?	4b		X

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

5a During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc, organization described in section 4945(d)(4)(A)? (see instructions) ☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see instructions)? **5b** N/A

Organizations relying on a current notice regarding disaster assistance check here ▶ ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53 4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** No: X

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

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? **7b** N/A

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ATCH 8		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		0.	0.	0.

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		0.

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 THE FOUNDATION DOES NOT CONDUCT ANY DIRECT CHARITABLE ACTIVITIES OR MAKE PROGRAM-RELATED INVESTMENTS, ACCORDINGLY, THERE IS NO RELEVANT STATISTICAL INFORMATION.	
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 THE FOUNDATION DOES NOT CONDUCT ANY DIRECT CHARITABLE ACTIVITIES OR MAKE PROGRAM-RELATED INVESTMENTS, THEREFORE, NO INCOME WAS PRODUCED BY ANY DIRECT CHARITABLE ACTIVITIES.	
2	
All other program-related investments See instructions.	
3 NONE	
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	1,128,816.
b	Average of monthly cash balances	1b	22,562.
c	Fair market value of all other assets (see instructions)	1c	
d	**Total** (add lines 1a, b, and c)	1d	1,151,378.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	1,151,378.
4	Cash deemed held for charitable activities Enter 1 1/2 % of line 3 (for greater amount, see instructions)	4	17,271.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,134,107.
6	**Minimum investment return.** Enter 5% of line 5	6	56,705.

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	56,705.
2a	Tax on investment income for 2015 from Part VI, line 5	2a	89.		
b	Income tax for 2015 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	89.
3	Distributable amount before adjustments Subtract line 2c from line 1			3	56,616.
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	56,616.
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	56,616.

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	125,500.
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	125,500.
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	89.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	125,411.

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					56,616.
2 Undistributed income, if any, as of the end of 2015					
a Enter amount for 2014 only					
b Total for prior years 20 13 ,20 12 ,20 11					
3 Excess distributions carryover, if any, to 2015					
a From 2010	37,312.				
b From 2011	58,491.				
c From 2012	47,334.				
d From 2013	88,504.				
e From 2014	57,723.				
f Total of lines 3a through e		289,364.			
4 Qualifying distributions for 2015 from Part XII, line 4 ▶ $ 125,500.					
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)					
d Applied to 2015 distributable amount					56,616.
e Remaining amount distributed out of corpus		68,884.			
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		358,248.			
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 2015. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2016					
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)		37,312.			
9 **Excess distributions carryover to 2016.** Subtract lines 7 and 8 from line 6a		320,936.			
10 Analysis of line 9					
a Excess from 2011	58,491.				
b Excess from 2012	47,334.				
c Excess from 2013	88,504.				
d Excess from 2014	57,723.				
e Excess from 2015	68,884.				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9) NOT APPLICABLE

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			N/A		
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).)

WILLIAM H. BLOCK

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

ATCH 9

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

NO FORMAL FORM.

c Any submission deadlines

NO SUBMISSION DEADLINES.

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

ATCH 10

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*				
ATCH 11				
Total . . . . . . ▶ **3a**				125,500.
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			14	1,113.	
4 Dividends and interest from securities			14	11,687.	
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			18	5,003.	
8 Gain or (loss) from sales of assets other than inventory			18	-39,656.	
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)				-21,853.	

13 Total. Add line 12, columns (b), (d), and (e) . . . 13 -21,853.

(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	N/A

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

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

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

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

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

b If "Yes," complete the following schedule.

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

Sign Here

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

Signature of officer or trustee — Date 11/13/16 — Title Trustee

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

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
SCOTT SATTLER		NOV 1 U 2016		P00540403

Firm's name ▶ SHEPARD SCHWARTZ & HARRIS LLP — Firm's EIN ▶ 36-1220454

Firm's address ▶ 123 N. WACKER DRIVE - 14TH FLOOR CHICAGO, IL 60606-1700 — Phone no 312-726-8353

[redacted]

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		TOTAL SHORT-TERM COMMON TRUST FUND AND PARTNERSHIP, S CORPORATION, AND OTHER ESTATES OR TRUST GAIN OR LOSS					3.	
		TOTAL LONG-TERM COMMON TRUST FUND AND PARTNERSHIP, S CORPORATION, AND OTHER ESTATES OR TRUST GAIN OR LOSS					-41,551.	
		TOTAL CAPITAL GAIN DISTRIBUTIONS					1,685.	
		43 SHS SPDR S&P EMERGING EFT SMALL CAP PROPERTY TYPE: SECURITIES				P	03/18/2013	12/28/2015
1,637.		2,041.					-404.	
		39 SHS SPDR SER TR EFT S&P 600 SMALL CAP PROPERTY TYPE: SECURITIES				P	05/16/2014	12/28/2015
3,896.		3,817.					79.	
		14 SHS SPDR DOW JONES INDL EFT AVERAGE E PROPERTY TYPE: SECURITIES				P	05/16/2014	12/28/2015
2,448.		2,295.					153.	
		14 SHS VANGUARD INTL EQUITY EFT INDEX FD PROPERTY TYPE: SECURITIES				P	05/16/2014	12/28/2015
1,299.		1,490.					-191.	
		29 SHS VANGUARD INTL EQTY ETF INDEX FDS PROPERTY TYPE: SECURITIES				P	05/16/2014	12/28/2015
1,268.		1,490.					-222.	
		41 SHS VANGUARD INTL EQUITY ETF INDEX FD PROPERTY TYPE: SECURITIES				P	03/18/2013	12/28/2015
1,360.		1,760.					-400.	
		32 SHS VANGUARD INDEX FDS ETF S&P 500 ET PROPERTY TYPE: SECURITIES				P	05/16/2014	12/28/2015
6,013.		5,490.					523.	
		25 SHS VANGUARD INDEX FDS ETF S&P 500 ET PROPERTY TYPE: SECURITIES				P	05/16/2014	12/31/2015
4,686.		4,289.					397.	
		32 SHS VANGUARD MID CAP ETF PROPERTY TYPE: SECURITIES				P	05/16/2014	12/28/2015
3,856.		3,585.					271.	
TOTAL GAIN(LOSS)							-39,657.	

FORM 990PF, PART I - INTEREST ON TEMPORARY CASH INVESTMENTS

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
FROM PASSTHROUGH K-1S	1,106.	1,106.
IRS ALLOWED INTEREST FROM 2007	7.	7.
TOTAL	1,113.	1,113.

ATTACHMENT 2

FORM 990PF, PART I - OTHER INCOME

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
SILVER CREEK CORE STRATEGIES LTD	5,066.	5,066.
SILVER CREEK LOW VOL STRATEGIES	-63.	-63.
TOTALS	5,003.	5,003.

FORM 990PF, PART I - INTEREST EXPENSE

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
SILVER CREEK LOW VOL STRATEGIES, L.P.	2.	2.
TOTALS	2.	2.

FORM 990PF, PART I - TAXES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
FOREIGN TAXES	409.	409.
STATE TAXES	25.	25.
IRS PAYMENTS	1,000.	
TOTALS	1,434.	434.

FORM 990PF, PART I - OTHER EXPENSES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
FROM FLOW THROUGH ENTITIES	3,598.	3,598.
MISCELLANEOUS EXPENSE	9.	9.
INVESTMENT ACCOUNT FEES	1,233.	1,233.
TOTALS	4,840.	4,840.

ATTACHMENT 6

FORM 990PF, PART II - CORPORATE STOCK

DESCRIPTION	BEGINNING BOOK VALUE	ENDING BOOK VALUE	ENDING FMV
VARIOUS STOCKS	524,050.	497,792.	489,747.
TOTALS	524,050.	497,792.	489,747.

FORM 990PF, PART II - OTHER INVESTMENTS

DESCRIPTION	BEGINNING BOOK VALUE	ENDING BOOK VALUE	ENDING FMV
SILVER CREEK LOW VOL II	111,198.	72,995.	101,007.
SILVER CREEK LOW VOL CAYMAN	133,226.	65,934.	122,394.
SILVER CREEK LOW VOL STRATEGIE	89,958.	41,021.	20,620.
SILVER CREEK CORE STRATEGIES	274,937.	345,985.	345,985.
TOTALS	609,319.	525,935.	590,006.

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

ATTACHMENT 8

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION	CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	EXPENSE ACCT AND OTHER ALLOWANCES
WILLIAM H BLOCK 3002 CASCADIA AVE. S. SEATTLE, WA 98144	TRUSTEE 1.00	0.	0.	0.
SUSAN J. LEAVITT 3002 CASCADIA AVE. S. SEATTLE, WA 98144	TRUSTEE 1.00	0.	0.	0.
	GRAND TOTALS	0.	0.	0.

ATTACHMENT 9

FORM 990PF, PART XV - NAME, ADDRESS AND PHONE FOR APPLICATIONS

WILLIAM H. BLOCK
3002 CASCADIA AVE. S.
SEATTLE, WA 98144
206-760-9038

990PF, PART XV - RESTRICTIONS OR LIMITATIONS ON AWARDS

NO RESTRICTIONS, EXCEPT ORGANIZATIONS MUST BE QUALIFIED 501(C)(3) ORGANIZATIONS.

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 11

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
SEE ATTACHMENT 10A VARIOUS ADDRESSES CHICAGO, IL 60637	NO RELATION - ALL QUALIFIED 501(C(3) ORGANIZATIONS	SEE ATTACHMENT 1[illegible]A	2,000.
SEE ATTACHMENT 10A VARIOUS ADDRESSES COLORADO SPRINGS, CO 80903	NO RELATION - ALL QUALIFIED 501(C(3) ORGANIZATIONS	SEE ATTACHMENT 1[illegible]A	2,000.
SEE ATTACHMENT 10A VARIOUS ADDRESSES SARASOTA, FL 34238	NO RELATION - ALL QUALIFIED 501(C(3) ORGANIZATIONS	SEE ATTACHMENT 1[illegible]A	1,000.
SEE ATTACHMENT 10A VARIOUS ADDRESSES NEW YORK, NY 10158	NO RELATION - ALL QUALIFIED 501(C(3) ORGANIZATIONS	SEE ATTACHMENT 1[illegible]A	500.
SEE ATTACHMENT 10A VARIOUS ADDRESSES REDMOND, WA 98052	NO RELATION - ALL QUALIFIED 501(C(3) ORGANIZATIONS	SEE ATTACHMENT 1[illegible]A	1,000
SEE ATTACHMENT 10A VARIOUS ADDRESSES CLAREMONT, CA 91711	NO RELATION - ALL QUALIFIED 501(C(3) ORGANIZATIONS	SEE ATTACHMENT 1[illegible]A	2,000.

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 11 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
SEE ATTACHMENT 10A VARIOUS ADDRESSES SEATTLE, WA 98101	NO RELATION - ALL QUALIFIED 501(C(3) ORGANIZATIONS	SEE ATTACHMENT 10A	117,000.
		TOTAL CONTRIBUTIONS PAID	125,500.

RECIPIENT	PURPOSE	AMOUNT
ACT THEATRE - SEATTLE, WA	CHARITABLE	$ 2,000
AMERICAN CIVIL LIBERTIES UNION - SEATTLE, WA	CHARITABLE	2,000
ANTI-DEFAMATION LEAGUE - NEW YORK, NY	CHARITABLE	500
ARTS CORP - SEATTLE, WA	CHARITABLE	2,000
ASIAN COUNSELING AND REFERRAL - SEATTLE, WA	CHARITABLE	1,000
BOOKIT THEATRE - SEATTLE, WA	CHARITABLE	1,000
CAMPAIGN FOR EQUAL JUSTICE - SEATTLE, WA	CHARITABLE	3,000
CATHOLIC HOUSING SERVICES - SEATTLE, WA	CHARITABLE	1,000
CHILD CARE RESOURCES - SEATTLE, WA	CHARITABLE	10,000
COLORADO COLLEGE - COLORADO SPRINGS, CO	EDUCATIONAL	2,000
COLUMBIA LEGAL SERVICES - SEATTLE, WA	CHARITABLE	2,000
COMPASS HOUSING ALLIANCE - SEATTLE, WA	CHARITABLE	2,000
CONSEJO - SEATTLE, WA	CHARITABLE	3,000
COUNTRY DOCTOR - SEATTLE, WA	CHARITABLE	2,000
CRISIS CLINIC - SEATTLE, WA	CHARITABLE	500
DOWNTOWN EMERGENCY SERVICE CENTER - SEATTLE, WA	CHARITABLE	3,000
EL CENTRO DEL LA RAZA - SEATTLE, WA	CHARITABLE	2,000
FARE START - SEATTLE, WA	CHARITABLE	1,000
FOOD LIFELINE - SEATTLE, WA	CHARITABLE	4,000
HOPELINK - REDMOND, WA	CHARITABLE	1,000
INTERIM CDA - SEATTLE, WA	CHARITABLE	1,000
INTERNATIONAL WALDENSTROMS FOUNDATION - SARASOTA, FL	CHARITABLE	1,000
JEWISH FAMILY SERVICES - SEATTLE, WA	CHARITABLE	1,000
CASCADE PUBLIC MEDIA (KCTS) - SEATTLE, WA	CHARITABLE	4,000
KUOW- SEATTLE, WA	CHARITABLE	5,000
KING COUNTY BAR FOUNDATION - SEATTLE, WA	CHARITABLE	2,000
LOW INCOME HOUSING INSTITUTE - SEATTLE, WA	CHARITABLE	2,000
M L KING SCHOLARSHIP - SEATTLE, WA	EDUCATIONAL	2,000
MILLIONAIR CLUB - SEATTLE, WA	CHARITABLE	1,000
MOCKINGBIRD SOCIETY - SEATTLE, WA	CHARITABLE	1,000
MOUNT BAKER COMMUNITY CLUB - SEATTLE, WA	CHARITABLE	500
NEIGHBORCARE HEALTH - SEATTLE, WA	CHARITABLE	4,000
NEW CENTURY THEATRE - SEATTLE, WA	CHARITABLE	2,000
NORTHWEST HARVEST - SEATTLE, WA	CHARITABLE	4,000
NORTHWEST JUSTICE PROJECT - SEATTLE, WA	CHARITABLE	1,000
OPERATION NIGHTWATCH - SEATTLE, WA	CHARITABLE	1,000
PIKE PLACE MARKET FOUNDATION - SEATTLE, WA	CHARITABLE	2,000
PLANNED PARENTHOOD- SEATTLE, WA	CHARITABLE	5,000
PLYMOUTH HOUSING GROUP - SEATTLE, WA	CHARITABLE	2,000
POMONA COLLEGE - CLAREMONT, CA	EDUCATIONAL	2,000
POWERFUL SCHOOLS - SEATTLE, WA	EDUCATIONAL	1,000
RECOVERY CAFÉ - SEATTLE, WA	CHARITABLE	2,000
REWA - SEATTLE, WA	CHARITABLE	3,000
ROOTS - SEATTLE, WA	CHARITABLE	1,000
SEATTLE CENTER FOUNDATION - SEATTLE, WA	CHARITABLE	2,000
SEATTLE CHILDREN'S THEATRE - SEATTLE, WA	CHARITABLE	3,000
SEATTLE REPERTORY THEATRE - SEATTLE, WA	CHARITABLE	2,000
SEATTLE SHAKESPEARE - SEATTLE, WA	CHARITABLE	2,000
SOLID GROUND - SEATTLE, WA	CHARITABLE	2,000
SOUND MENTAL HEALTH - SEATTLE, WA	CHARITABLE	2,000
STRAWBERRY THEATRE WORKSHOP - SEATTLE, WA	CHARITABLE	1,500
UNION GOSPEL MISSION - SEATTLE, WA	CHARITABLE	1,000
UNITED WAY OF KING COUNTY - SEATTLE, WA	CHARITABLE	2,000
UNIVERSITY OF CHICAGO LAW SCHOOL - CHICAGO, IL	EDUCATIONAL	2,000
WASHINGTON ENSEMBLE THEATRE - SEATTLE, WA	CHARITABLE	2,000
WASHINGTON LOW INCOME HOUSING ALLIANCE - SEATTLE, WA	CHARITABLE	1,500
WELLSPRING FAMILY SERVICES - SEATTLE, WA	CHARITABLE	2,000
YMCA - SEATTLE, WA	CHARITABLE	1,000
YOUTH CARE - SEATTLE, WA	CHARITABLE	2,000
YWCA - SEATTLE, WA	CHARITABLE	2,000
Total		$ 125,500

ATTACHMENT 11A

ATTACHMENT 1

REASON FOR 2ND EXTENSION

AN ATTEMPT TO OBTAIN INFORMATION NECESSARY FOR FILING A RETURN WAS REQUESTED IN A TIMELY FASHION, BUT THE INFORMATION WAS NOT FURNISHED IN SUFFICIENT TIME TO PERMIT THE TIMELY FILING OF THE RETURN, OR THE TAXPAYER PERSONALLY VISITED AN IRS OFFICE FOR THE PURPOSE OF SECURING INFORMATION OR ADVICE AND WAS UNABLE TO MEET WITH AN IRS REPRESENTATIVE