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Form **990-PF****Return of Private Foundation**
or Section 4947(a)(1) Trust Treated as Private Foundation

OMB No 1545-0052

2015

Open to Public Inspection

Department of the Treasury
Internal Revenue Service▶ 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.

For calendar year 2015 or tax year beginning

, 2015, and ending

, 20

Name of foundation

Michael and Susan Newburger Foundation

Number and street (or P.O. box number if mail is not delivered to street address)

920 Main Street

Room/suite

1950

City or town, state or province, country, and ZIP or foreign postal code

Kansas City, MO 64105

A Employer identification number

43-1173378

B Telephone number (see instructions)

816-421-2050C If exemption application is pending, check here ▶ ☐D 1. Foreign organizations, check here ▶ ☐2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity
☐ Final return ☐ Amended return
☐ Address change ☐ Name changeH Check type of organization: ☒ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundationI Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ **656,492**
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))		(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	468.14	468.14		
	4 Dividends and interest from securities	7815.11	7815.11		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)		10,089.12		
	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	8283.25	18,372.37			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	1925.00	1000.00		925.00
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	979.84	643.66		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)				
	24 Total operating and administrative expenses. Add lines 13 through 23	2904.84	1643.66		925.00
	25 Contributions, gifts, grants paid	33,555			33,555
26 Total expenses and disbursements. Add lines 24 and 25	36,459.84	1643.66		34,480.00	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	-28,176.59				
b Net investment income (if negative, enter -0-)		16,728.71			
c Adjusted net income (if negative, enter -0-)					

For Paperwork Reduction Act Notice, see instructions.

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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	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing	31,814		29,592
	2 Savings and temporary cash investments			
	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)	570,221		555,222
	c Investments—corporate bonds (attach schedule)	90,093		71,678
	11 Investments—land, buildings, and equipment: basis ▶			
Liabilities	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 ▶)			
	16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	692,128		656,492
	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
Net Assets or Fund Balances	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)			
	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	692,128	656,492	
	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)	692,128	656,492	
	31 Total liabilities and net assets/fund balances (see instructions)	692,128	656,492	

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	692,128
2 Enter amount from Part I, line 27a	2	-28,177
3 Other increases not included in line 2 (itemize) ▶	3	10,089
4 Add lines 1, 2, and 3	4	674,040
5 Decreases not included in line 2 (itemize) ▶ Portfolio adjustment	5	17,548
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	656,492

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 Capital Gain Distributions from 1099				
b UBS - See attached schedule		P	Var.	Var.
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			13.74	
b 260,553.26		250,477.88	10,075.38	
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any		
a				
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	10,089.12	
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.

(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	30,248	792,491	.0381683
2013	40,510	762,146	.0531525
2012	30,328	666,846	.0454798
2011	27,690	620,120	.0446526
2010	40,312	615,047	.0655429
2 Total of line 1, column (d)		2	.246996
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	.0493992
4 Enter the net value of noncharitable-use assets for 2015 from Part X, line 5		4	664,195
5 Multiply line 4 by line 3		5	32,810.70
6 Enter 1% of net investment income (1% of Part I, line 27b)		6	167.29
7 Add lines 5 and 6		7	32,643.41
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.		8	34,480

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	167	29
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	167	29
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	167	29
6	Credits/Payments:			
a	2015 estimated tax payments and 2014 overpayment credited to 2015	6a		
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		
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	167	29
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11	Enter the amount of line 10 to be Credited to 2016 estimated tax 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?	Yes	No
1a			✓
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the 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>		
c	Did the foundation file Form 1120-POL for this year?		✓
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	✓
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	✓
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? <i>If "Yes," attach the statement required by General Instruction T.</i>	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? <i>If "Yes," complete Part II, col. (c), and Part XV</i>	7	✓
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ Missouri		
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	✓
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	✓
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	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)		✓
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)		✓
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ►	✓	
14 The books are in care of ► <u>Michael & Susan Newburger</u> Telephone no. ► _____		
Located at ► <u>6614 Royal Ct., Kansas City, MO</u> ZIP+4 ► <u>64152</u>		
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 ► <u>15</u>		
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 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

	Yes	No
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		
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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015</i>)	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	✓
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)

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
Michael Newburger				
6614 Royal Ct., Kansas City, MO 64152	3	0	0	0
Susan Newburger				
6614 Royal Ct. Kansas City, MO 64152	3	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 ▶

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	643,607
b	Average of monthly cash balances	1b	30,703
c	Fair market value of all other assets (see instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	674,310
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	674,310
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	10,115
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	664,195
6	Minimum investment return. Enter 5% of line 5	6	33,210

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	33,210
2a	Tax on investment income for 2015 from Part VI, line 5	2a	167.29
b	Income tax for 2015. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	167.29
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	33,042.71
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	33,042.71
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	33,042.71

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	34,480
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	34,480
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	167.29
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	34,312.71

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				33,042.71
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				
c From 2012				
d From 2013				
e From 2014 10,474				
f Total of lines 3a through e	10,474			
4 Qualifying distributions for 2015 from Part XII, line 4: ► \$ 34,480				
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				22,568.71
e Remaining amount distributed out of corpus	11,911.29			
5 Excess distributions carryover applied to 2015 (If an amount appears in column (d), the same amount must be shown in column (a).)	10,474			10,474
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	11,911.29			
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				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	11,911.29			
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 11,911.29				

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)		
2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	Tax year	Prior 3 years			(e) Total
		(a) 2015	(b) 2014	(c) 2013	(d) 2012	
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 XVI-A: Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

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	8283	
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					
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)				8283	
13	Total. Add line 12, columns (b), (d), and (e)				8283	

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

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

[illegible]

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)	✓
	(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.		

[illegible]

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.

<i>Muel Newkirk</i> Signature of officer or trustee	<i>15-15-16</i> Date	<i>Trustee</i> 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 <i>Dale Norman</i> OLSEN & TALPERS, P.C.	Preparer's signature <i>[Signature]</i>	Date 5-15-16	Check ☐ if self-employed	PTIN
	Firm's name ▶ 320 MAIN STREET, SUITE 1950 KANSAS CITY, MISSOURI 64105	Firm's EIN ▶	Phone no		
	Firm's address ▶ 43-1118252				

MICHAEL & SUSAN NEWBURGER FOUNDATION

2015 FORM 990 PF

43-1173378

Part I Line 16a – Legal Fees

Olsen & Talpers – Legal Fees & Tax Prep	\$1,925.00
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Line 18 – Taxes

US Treasury – Excise tax	\$ 336.18
Taxes on Investments - Foreign	<u>\$ 643.66</u>
	\$ 979.84

Part II – Line 10b

UBS Stock Fund	\$555,222
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Line 10c

UBS Bond Fund	\$ 71,678
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MICHAEL & SUSAN NEWBURGER FOUNDATION

43-1173378

2015 Form 990-PF

LIST OF CONTRIBUTIONS

Park Hill Educational Found.	Parkville, MO	educational	\$1,550
K.C. Symphony	K.C. MO	community project	6,752
St. George's Found.	St. Georges, Bda.	community project	200
Shrine Project	K.C. MO	community project	25
Bannaker School Res. Fund	Parkville, MO	community project	100
Nat'l Park Found.	Wash. D.C.	community project	100
AFS	NYC, NY	community project	100
Americares	K.C., MO	community project	100
Park Univ.	Parkville, MO	educational	1000
Girl Scouts	Parkville, MO	community project	40
MADD	Boston, MA	community program	100
Mercy Ships	Bethesda, MD	community fund	200
Habitat for Humanity	KC, MO	community program	100
US China Friend. Soc.	K.C., MO	community project	1500
Special Olympics MO	Springfield, MO	community project	200
Nat'l Fed Blind	K.C.MO	community project	75
Greater KC PTP	Kansas City, MO	community fund	48
Doctors Without Borders	Washington, DC	community fund	100
Eleemosynary Soc.	K.C., MO	community project	500
CARE	NYC, NY	community fund	100
Heart to Heart	K.C.MO	community project	250
UMKC Sch. Med.	K.C. MO	community fund	500
Friends of Art	K.C. MO	community fund	135
Musical Theater Heritage	K.C. MO	community project	1000
Red Nose Fund	NYC, NY	community fund	100
Wishing Well Found.	Washington, DC	community fund	100
Culver Stockton college	Canton, MO	educational	5500
Children's Wish Found.	Bethesda, MD	community program	50
Consumer Rep. Found.	Syracuse, NY	community program	275
UNICEF	NYC, NY	community program	250
MO Wonderland Camp	Sedalia, MO	community fund	50
KCUR Radio	K.C., KS	community project	990
Regents Univ. Wisconsin	Madison, WI	education	1500
KC Symphony Ball	K.C. MO	community program	500
BUEI	Hamilton, Bda	community fund	200
KS Public Radio	Lawrence, KS	community program	150
Charlie's House	K.C. MO	community fund	250
MO Repertory Theater	K.C.MO	community program	332

MS Society	K.C., MO	community project	75
Cygnus Exposition	Rispon, WI	community program	315
Smithsonian	Wash. D.C.	community project	250
KCPT	K.C. MO	community program	615
Harvest Ball Society	K.C. MO	community fund	625
Feed Northland Kids	K.C. MO	community fund	250
Shop With A Deputy	Platte City, MO	community fund	100
Bermuda Zoo Soc.	Hamilton, Bda	community project	75
City of Parkville	Parkville, MO	community fund	2500
People to People	K.C., MO	community project	45
Pine Island Camp	Belgrade, MO	community project	100
Parkville EDC	Parkville, MO	community project	2500
Planned Parenthood	K.C. MO	community fund	100
Above the Bar Dance Acad.	St. Joseph, MO	community project	648
Make a Wish Found.	K.C. MO	community program	200
TOTAL			\$33,555

UBS FINANCIAL SERVICES INC. 2015 Detail for Dividends and Distributions

Account JK 29409

03/22/2016

This section of your tax information statement contains the payment level detail of your taxable dividends, capital gains distributions, exempt-interest dividends, nondividend distributions and liquidation distributions. Also shown are the fair market values of any taxable stock dividends or noncash liquidation distributions.

Federal, state and foreign tax withheld and investment expenses are presented as negative amounts but do not net against the reportable income totals. Any taxes withheld will also be reported to you separately on Form 1099-DIV. All amounts are grouped by security, with the transactions listed in chronological order. Subtotals for each security are provided. For situations in which the tax character of a distribution (or part thereof) is different than at the time it was paid, endnotes are provided for further explanation.

Note that a transaction characterized as a "Qualified dividend" is only issuer-qualified. We include, where available, the ex date of the distribution to assist with your determination of whether the taxpayer holding period requirement has been satisfied.

Security description	CUSIP and/or symbol	State	Date	Amount	Transaction type	Notes	Ex-Date
UNTS AAM ADV CORP TR NAV/DIAL HIGH	00768V327		01/25/15	0.20	Nonqualified dividend	12	
INC.OPPOR CASH PORTF.SER.15			01/25/15	4.80	Nonqualified dividend	11	
			01/25/15	9.23	Long-term capital gain	12	
			01/25/15	500.27	Nondividend distribution	12	
			02/24/15	1.80	Nonqualified dividend	11	
				516.30			
Dividends and Distributions:							
UNTS FT TACT INC PRTO SER 24 24 REIN	30282N816		01/25/15	169.39	Qualified dividend	11	
11/12/15			01/25/15	130.22	Nonqualified dividend	12	
			01/25/15	140.85	Nonqualified dividend	11	
			01/25/15	64.83	Nondividend distribution	12	
			01/25/15	154.47	Nondividend distribution	11	
			02/25/15	110.07	Qualified dividend	11	
			02/25/15	91.52	Nonqualified dividend	11	
			02/25/15	100.37	Nondividend distribution	11	
			03/25/15	139.79	Qualified dividend	11	
			03/25/15	116.24	Nonqualified dividend	11	
			03/25/15	127.48	Nondividend distribution	11	
			04/25/15	144.54	Qualified dividend	11	
			04/25/15	120.19	Nonqualified dividend	11	
			04/25/15	131.81	Nondividend distribution	11	
			05/25/15	126.87	Qualified dividend	11	
			05/25/15	104.65	Nonqualified dividend	11	
			05/25/15	114.77	Nondividend distribution	11	
			06/25/15	123.51	Qualified dividend	11	
			06/25/15	102.71	Nonqualified dividend	11	
			06/25/15	112.64	Nondividend distribution	11	
			07/25/15	153.65	Qualified dividend	11	
			07/25/15	127.76	Nonqualified dividend	11	
			07/25/15	499.57	Nonqualified dividend	12	

UBS FINANCIAL SERVICES INC.

Account JK 29409

Detail for Dividends and Distributions

(continued)

03/22/2016

2015

Security description	CUSIP and/or symbol	State	Date	Amount	Transaction type	Notes	Ex-Date
UNTS FT TACT INC PRIFO SER 24 24 REIN 11/12/15(Cont'd)			07/25/15	140.11	Nondividend distribution	11	
			07/25/15	248.73	Nondividend distribution	12	
			08/25/15	133.90	Qualified dividend	11	
			08/25/15	111.34	Nonqualified dividend	11	
			08/25/15	122.10	Nondividend distribution	11	
			09/25/15	126.83	Qualified dividend	11	
			09/25/15	105.45	Nonqualified dividend	11	
			09/25/15	115.65	Nondividend distribution	11	
			10/25/15	128.99	Qualified dividend	11	
			10/25/15	107.26	Nonqualified dividend	11	
			10/25/15	117.63	Nondividend distribution	11	
				4,664.89			
Dividends and Distributions:							
UNTS FT BAL INC SEL PORT SER 56 56 CASH 10/16/17	30287K759		12/25/15	57.00	Qualified dividend	11	
			12/25/15	187.41	Nonqualified dividend	11	
			12/25/15	0.57	Long-term capital gain	12	
			12/25/15	2.07	Long-term capital gain	11	
			12/25/15	0.06	Nondividend distribution	12	
			12/25/15	26.12	Nondividend distribution	11	
			01/08/16	51.35	Qualified dividend	11	
			01/08/16	168.84	Nonqualified dividend	11	
			01/08/16	1.87	Long-term capital gain	11	
			01/08/16	23.53	Nondividend distribution	11	
				518.82			
Dividends and Distributions:							
Total Dividends and Distributions:				5,700.01			

UBS FINANCIAL SERVICES INC.

Account JK 29409

Detail for Interest Income

2015

03/22/2016

This section of your tax information statement contains the payment level detail of all taxable interest and associated bond premium. Market discount will be shown here only if you have elected to recognize it currently rather than at the time of sale or maturity. Bond premium and market discount for covered tax lots are totaled in Interest Income and reported to the IRS. For noncovered tax lots, they are totaled in the Adjustments to Interest and Original Issue Discount and are not reported to the IRS.

To provide a complete picture of activity for each investment, we also include here transactions such as accrued interest paid on purchases and payment or receipt of nonqualified interest. Other amounts, such as federal, state and foreign tax withheld and investment expenses are shown as negative amounts but do not net against the reportable income totals. Additionally, tax withheld (and associated payments) will also appear on a separately provided Form 1099-INT.

Some amounts shown as Agency interest may be exempt from state tax. You may wish to consult with your tax advisor, the IRS or your state tax authority regarding the proper treatment.

Security description	CUSIP and/or symbol	Date	Amount	Transaction type	Notes
UBS BANK USA BUSINESS ACCOUNT	90499A916	02/05/15	0.03	Interest	
		03/05/15	0.28	Interest	
		03/11/15	0.05	Interest	
		12/04/15	0.02	Interest	
			0.38		
UBS AG DEPOSIT ACCOUNT	90499A924	04/01/15	0.16	Interest	
UNTS FIRST TRUST CORP INVESTMENT	30270C251	01/01/15	230.51	Interest	13
GRADE INTERMEDIATE SER 4 MTHLY		01/31/15	84.77	Interest	11
		01/31/15	-21.77	Investment expense	15
		02/28/15	41.98	Interest	11
		02/28/15	-10.78	Investment expense	15
		03/31/15	34.18	Interest	11
		03/31/15	-8.78	Investment expense	15
		04/30/15	21.26	Interest	11
		04/30/15	-5.46	Investment expense	15
		05/31/15	22.61	Interest	11
		05/31/15	-5.81	Investment expense	15
		06/30/15	27.72	Interest	11
		06/30/15	-7.12	Investment expense	15
		07/09/15	4.57	Interest	11
		07/09/15	-1.17	Investment expense	15

Interest Income:
Investment expense:

467.60
-60.89