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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

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

▶ Information about Form 990-PF and its instructions is at [www.irs.gov/form990pf](http://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<br>SB SCHAAR & PK WHELPTON FOUNDATION<br>C/O DAN KOVARIK                                                                                                                                                                            |  | A Employer identification number<br><br>91-6468169                                                                                                                           |  |
| Number and street (or P O box number if mail is not delivered to street address)<br>10655 NE FOURTH STREET SUITE 510                                                                                                                                   |  | B Telephone number (see instructions)<br><br>(425) 213-1550                                                                                                                  |  |
| City or town, state or province, country, and ZIP or foreign postal code<br>BELLEVUE, WA 98004                                                                                                                                                         |  | C If exemption application is pending, check here <input type="checkbox"/>                                                                                                   |  |
| G Check all that apply<br><input type="checkbox"/> Initial return<br><input type="checkbox"/> Final return<br><input type="checkbox"/> Address change                                                                                                  |  | D 1. Foreign organizations, check here <input type="checkbox"/><br>2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/> |  |
| H Check type of organization<br><input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation<br><input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust<br><input type="checkbox"/> Other taxable private foundation |  | E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>                                                                |  |
| I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 6,443,843                                                                                                                                                      |  | F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>                                                             |  |
| J Accounting method<br><input checked="" type="checkbox"/> Cash<br><input type="checkbox"/> Accrual<br><input type="checkbox"/> Other (specify) _____<br>(Part I, column (d) must be on cash basis.)                                                   |  |                                                                                                                                                                              |  |

| Part I Analysis of Revenue and Expenses<br>(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<br>(a) | Net investment income<br>(b) | Adjusted net income<br>(c) | Disbursements for charitable purposes<br>(d) (cash basis only) |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------|---------------------------------------|------------------------------|----------------------------|----------------------------------------------------------------|
| Revenue                                                                                                                                                                | 1 Contributions, gifts, grants, etc , received (attach schedule) . . . . .                                       |                                       |                              |                            |                                                                |
|                                                                                                                                                                        | 2 Check ▶ <input checked="" type="checkbox"/> if the foundation is <b>not</b> required to attach Sch B . . . . . |                                       |                              |                            |                                                                |
|                                                                                                                                                                        | 3 Interest on savings and temporary cash investments                                                             |                                       |                              |                            |                                                                |
|                                                                                                                                                                        | 4 Dividends and interest from securities . . . . .                                                               | 138,066                               | 138,066                      |                            |                                                                |
|                                                                                                                                                                        | 5a Gross rents . . . . .                                                                                         |                                       |                              |                            |                                                                |
|                                                                                                                                                                        | b Net rental income or (loss) _____                                                                              |                                       |                              |                            |                                                                |
|                                                                                                                                                                        | 6a Net gain or (loss) from sale of assets not on line 10                                                         | 56,248                                |                              |                            |                                                                |
|                                                                                                                                                                        | b Gross sales price for all assets on line 6a<br>4,364,414                                                       |                                       |                              |                            |                                                                |
|                                                                                                                                                                        | 7 Capital gain net income (from Part IV, line 2) . . .                                                           |                                       | 56,248                       |                            |                                                                |
|                                                                                                                                                                        | 8 Net short-term capital gain . . . . .                                                                          |                                       |                              |                            |                                                                |
|                                                                                                                                                                        | 9 Income modifications . . . . .                                                                                 |                                       |                              |                            |                                                                |
|                                                                                                                                                                        | 10a Gross sales less returns and allowances                                                                      |                                       |                              |                            |                                                                |
| Operating and Administrative Expenses                                                                                                                                  | b Less Cost of goods sold . . . . .                                                                              |                                       |                              |                            |                                                                |
|                                                                                                                                                                        | c Gross profit or (loss) (attach schedule) . . . . .                                                             |                                       |                              |                            |                                                                |
|                                                                                                                                                                        | 11 Other income (attach schedule) . . . . .                                                                      |                                       |                              |                            |                                                                |
|                                                                                                                                                                        | 12 Total.Add lines 1 through 11 . . . . .                                                                        | 194,314                               | 194,314                      |                            |                                                                |
|                                                                                                                                                                        | 13 Compensation of officers, directors, trustees, etc                                                            | 0                                     | 0                            |                            | 0                                                              |
|                                                                                                                                                                        | 14 Other employee salaries and wages . . . . .                                                                   |                                       |                              |                            |                                                                |
|                                                                                                                                                                        | 15 Pension plans, employee benefits . . . . .                                                                    |                                       |                              |                            |                                                                |
|                                                                                                                                                                        | 16a Legal fees (attach schedule). . . . .                                                                        |                                       |                              |                            |                                                                |
|                                                                                                                                                                        | b Accounting fees (attach schedule). . . . .                                                                     | 3,555                                 | 1,778                        |                            | 1,777                                                          |
|                                                                                                                                                                        | c Other professional fees (attach schedule) . . . . .                                                            |                                       |                              |                            |                                                                |
|                                                                                                                                                                        | 17 Interest . . . . .                                                                                            |                                       |                              |                            |                                                                |
|                                                                                                                                                                        | 18 Taxes (attach schedule) (see instructions) . . .                                                              | 3,728                                 | 1,864                        |                            | 1,864                                                          |
|                                                                                                                                                                        | 19 Depreciation (attach schedule) and depletion . . .                                                            |                                       |                              |                            |                                                                |
|                                                                                                                                                                        | 20 Occupancy . . . . .                                                                                           |                                       |                              |                            |                                                                |
|                                                                                                                                                                        | 21 Travel, conferences, and meetings. . . . .                                                                    |                                       |                              |                            |                                                                |
|                                                                                                                                                                        | 22 Printing and publications . . . . .                                                                           |                                       |                              |                            |                                                                |
|                                                                                                                                                                        | 23 Other expenses (attach schedule). . . . .                                                                     | 3,550                                 | 1,776                        |                            | 1,774                                                          |
|                                                                                                                                                                        | 24 Total operating and administrative expenses.<br>Add lines 13 through 23 . . . . .                             | 10,833                                | 5,418                        |                            | 5,415                                                          |
|                                                                                                                                                                        | 25 Contributions, gifts, grants paid . . . . .                                                                   | 330,917                               |                              |                            | 330,917                                                        |
|                                                                                                                                                                        | 26 Total expenses and disbursements.Add lines 24 and 25                                                          | 341,750                               | 5,418                        |                            | 336,332                                                        |
|                                                                                                                                                                        | 27 Subtract line 26 from line 12                                                                                 |                                       |                              |                            |                                                                |
|                                                                                                                                                                        | a Excess of revenue over expenses and disbursements                                                              | -147,436                              |                              |                            |                                                                |
|                                                                                                                                                                        | b Net investment income (if negative, enter -0-)                                                                 |                                       | 188,896                      |                            |                                                                |
|                                                                                                                                                                        | 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 . . . . .                                                                                              |                                                                                                                     |                   |                |                       |
|                             | 2                                                                                                                             | Savings and temporary cash investments . . . . .                                                                                 | 273,463                                                                                                             | 343,487           | 343,487        |                       |
|                             | 3                                                                                                                             | Accounts receivable ▶ <u>4,228</u>                                                                                               |                                                                                                                     |                   |                |                       |
|                             |                                                                                                                               | Less allowance for doubtful accounts ▶ _____                                                                                     | 4,909                                                                                                               | 4,228             | 4,228          |                       |
|                             | 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) . . . . .                                                                          |                                                                                                                     |                   |                |                       |
|                             | 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) . . . . .                                                                                 | 6,429,143                                                                                                                        | 6,211,683                                                                                                           | 6,096,128         |                |                       |
| 14                          | Land, buildings, and equipment basis ▶ _____                                                                                  |                                                                                                                                  |                                                                                                                     |                   |                |                       |
|                             | Less accumulated depreciation (attach schedule) ▶ _____                                                                       |                                                                                                                                  |                                                                                                                     |                   |                |                       |
| 15                          | Other assets (describe ▶ _____)                                                                                               |                                                                                                                                  |                                                                                                                     |                   |                |                       |
| 16                          | Total assets(to be completed by all filers—see the instructions Also, see page 1, item I)                                     | 6,707,515                                                                                                                        | 6,559,398                                                                                                           | 6,443,843         |                |                       |
| 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 ▶ _____)                                                                                             | 4,409                                                                                                               | 3,728             |                |                       |
|                             | 23                                                                                                                            | Total liabilities(add lines 17 through 22) . . . . .                                                                             | 4,409                                                                                                               | 3,728             |                |                       |
| Net Assets or Fund Balances | Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> 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 ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.   |                                                                                                                                  |                                                                                                                     |                   |                |                       |
|                             | 27                                                                                                                            | Capital stock, trust principal, or current funds . . . . .                                                                       | 5,397,203                                                                                                           | 5,397,203         |                |                       |
|                             | 28                                                                                                                            | Paid-in or capital surplus, or land, bldg , and equipment fund                                                                   | 0                                                                                                                   | 0                 |                |                       |
|                             | 29                                                                                                                            | Retained earnings, accumulated income, endowment, or other funds                                                                 | 1,305,903                                                                                                           | 1,158,467         |                |                       |
| 30                          | Total net assets or fund balances(see instructions) . . . . .                                                                 | 6,703,106                                                                                                                        | 6,555,670                                                                                                           |                   |                |                       |
| 31                          | Total liabilities and net assets/fund balances(see instructions) . . . . .                                                    | 6,707,515                                                                                                                        | 6,559,398                                                                                                           |                   |                |                       |

| Part III Analysis of Changes in Net Assets or Fund Balances |                                                                                                                                                                    |   |           |
|-------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|-----------|
| 1                                                           | Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year’s return) . . . . . | 1 | 6,703,106 |
| 2                                                           | Enter amount from Part I, line 27a . . . . .                                                                                                                       | 2 | -147,436  |
| 3                                                           | Other increases not included in line 2 (itemize) ▶ _____                                                                                                           | 3 | 0         |
| 4                                                           | Add lines 1, 2, and 3 . . . . .                                                                                                                                    | 4 | 6,555,670 |
| 5                                                           | Decreases not included in line 2 (itemize) ▶ _____                                                                                                                 | 5 | 0         |
| 6                                                           | Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 . . . . .                                                      | 6 | 6,555,670 |

Part IV

Capital Gains and Losses for Tax on Investment Income

|                                                                                                                                      |                           |                                              |                                      |                                  |
|--------------------------------------------------------------------------------------------------------------------------------------|---------------------------|----------------------------------------------|--------------------------------------|----------------------------------|
| List and describe the kind(s) of property sold (e g , real estate,<br>(a) 2-story brick warehouse, or common stock, 200 shs MLC Co ) |                           | How acquired<br>P—Purchase<br>(b) D—Donation | Date acquired<br>(c) (mo , day, yr ) | Date sold<br>(d) (mo , day, yr ) |
| 1a                                                                                                                                   | See Additional Data Table |                                              |                                      |                                  |
| b                                                                                                                                    |                           |                                              |                                      |                                  |
| c                                                                                                                                    |                           |                                              |                                      |                                  |
| d                                                                                                                                    |                           |                                              |                                      |                                  |
| e                                                                                                                                    |                           |                                              |                                      |                                  |

|                             |                                            |                                                 |                                              |
|-----------------------------|--------------------------------------------|-------------------------------------------------|----------------------------------------------|
| (e) Gross sales price       | Depreciation allowed<br>(f) (or allowable) | Cost or other basis<br>(g) plus expense of sale | Gain or (loss)<br>(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<br>col (k), but not less than -0-) or<br>(l) Losses (from col (h)) |
| (i) F M V as of 12/31/69                                                                    | Adjusted basis<br>(j) as of 12/31/69 | Excess of col (i)<br>(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<br>If (loss), enter -0- in Part I, line 7 } | 2 | 56,248 |
| 3 | Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)<br><br>If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0-<br>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)<br>Base period years Calendar<br>year (or tax year beginning in) | (b)<br>Adjusted qualifying distributions | (c)<br>Net value of noncharitable-use assets | (d)<br>Distribution ratio<br>(col (b) divided by col (c)) |
| 2014                                                                 | 295,981                                  | 7,136,497                                    | 0 041474                                                  |
| 2013                                                                 | 258,261                                  | 6,246,706                                    | 0 041344                                                  |
| 2012                                                                 | 261,820                                  | 5,653,769                                    | 0 046309                                                  |
| 2011                                                                 | 209,000                                  | 5,275,364                                    | 0 039618                                                  |
| 2010                                                                 | 198,814                                  | 4,596,407                                    | 0 043254                                                  |

|   |                                                                                                                                                                               |   |           |
|---|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|-----------|
| 2 | Total of line 1, column (d). . . . .                                                                                                                                          | 2 | 0 211999  |
| 3 | Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by<br>the number of years the foundation has been in existence if less than 5 years | 3 | 0 042400  |
| 4 | Enter the net value of noncharitable-use assets for 2015 from Part X, line 5. . . . .                                                                                         | 4 | 6,723,967 |
| 5 | Multiply line 4 by line 3. . . . .                                                                                                                                            | 5 | 285,096   |
| 6 | Enter 1% of net investment income (1% of Part I, line 27b). . . . .                                                                                                           | 6 | 1,889     |
| 7 | Add lines 5 and 6. . . . .                                                                                                                                                    | 7 | 286,985   |
| 8 | Enter qualifying distributions from Part XII, line 4. . . . .                                                                                                                 | 8 | 336,332   |

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 . . . . .

c

All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)

2

Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)

2

0

3

Add lines 1 and 2. . . . .

3

1,889

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

1,889

6

Credits/Payments

a

2015 estimated tax payments and 2014 overpayment credited to 2015

6a

13,596

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

13,596

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

11,707

11

Enter the amount of line 10 to be **Credited to 2015 estimated tax** ☒ 11,707 **Refunded** ☒

11

0

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

No

b

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

1b

No

c

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

1c

No

d

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

e

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

2

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

2

No

3

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

3

No

4a

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

4a

No

b

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

4b

5

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

5

No

6

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

6

No

7

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

7

Yes

8a

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

Yes

9

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

9

No

10

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

10

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?<br>Website address ▶N/A                                                                                                                                                                                                                                      | 13 | Yes |    |
| 14 | The books are in care of ▶DAN KOVARIK Telephone no ▶(425) 213-1550<br>Located at ▶10655 NE FOURTH STREET SUITE 510 BELLEVUE WA ZIP+4 ▶98004                                                                                                                                                                                                                                      |    |     |    |
| 15 | Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> —Check here . . . . . ▶ <input type="checkbox"/><br>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?<br>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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No                                                                                                                                                                                                                                                                                                                                                                                  |    |     |    |
|                                                                                         | (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No                                                                                                                                                                                                                                                                                                                                                |    |     |    |
|                                                                                         | (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No                                                                                                                                                                                                                                                                                                                                                                              |    |     |    |
|                                                                                         | (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No                                                                                                                                                                                                                                                                                                                 |    |     |    |
|                                                                                         | (6) Agree to pay money or property to a government official? ( <b>Exception.</b> 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 ). . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No                                                                                                                                                                                                        |    |     |    |
| b                                                                                       | If any answer is "Yes" to 1a(1)–(6), did <b>any</b> 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)? . . . . . <input type="checkbox"/>                                                                                                                                                                                                                                                                              | 1b |     |    |
| c                                                                                       | Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2015? . . . . . <input type="checkbox"/>                                                                                                                                                                                                                                                                                                                  | 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? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No<br>If "Yes," list the years ▶ 20____, 20____, 20____, 20____                                                                                                                                                                                                                                                |    |     |    |
| b                                                                                       | Are there any years listed in 2a for which the foundation is <b>not</b> 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 <b>all</b> years listed, answer "No" and attach statement—see instructions ). . . . . <input type="checkbox"/>                                                                                                                                                                                     | 2b |     |    |
| c                                                                                       | If the provisions of section 4942(a)(2) are being applied to <b>any</b> 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? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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> ) . . . . . <input type="checkbox"/> | 3b |     |    |
| 4a                                                                                      | Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?                                                                                                                                                                                                                                                                                                                                                                                                                             | 4a |     | No |
| b                                                                                       | Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2015?                                                                                                                                                                                                                                                                                                           | 4b |     | No |

Part VII-B

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

5a

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

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

b

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

5b

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

☒

c

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

☐ Yes ☐ No

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

6a

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

☐ Yes ☒ No

b

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

6b

No

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

7a

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

☐ Yes ☒ No

b

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

7b

Part VIII

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

1

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

| (a) Name and address                                   | Title, and average hours per week (b) devoted to position | (c) Compensation (If not paid, enter -0-) | (d) Contributions to employee benefit plans and deferred compensation | Expense account, (e) other allowances |
|--------------------------------------------------------|-----------------------------------------------------------|-------------------------------------------|-----------------------------------------------------------------------|---------------------------------------|
| JULIE E EDSFORTH                                       | MANAGING TRUSTEE<br>1 00                                  | 0                                         | 0                                                                     | 0                                     |
| 10655 NE FOURTH STREET SUITE 510<br>BELLEVUE, WA 98004 |                                                           |                                           |                                                                       |                                       |
| JABE BLUMENTHAL                                        | TRUSTEE<br>1 00                                           | 0                                         | 0                                                                     | 0                                     |
| 10655 NE FOURTH STREET SUITE 510<br>BELLEVUE, WA 98004 |                                                           |                                           |                                                                       |                                       |

2

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

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

Total

number of other employees paid over \$50,000.

0

## Part VIII

**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                                                        |                     |                  |
|                                                             |                     |                  |
|                                                             |                     |                  |
|                                                             |                     |                  |
|                                                             |                     |                  |
|                                                             |                     |                  |
|                                                             |                     |                  |
|                                                             |                     |                  |
|                                                             |                     |                  |
|                                                             |                     |                  |

|                                                                                          |   |
|------------------------------------------------------------------------------------------|---|
| <b>Total</b> number of others receiving over \$50,000 for professional services. . . . . | 0 |
|------------------------------------------------------------------------------------------|---|

## Part IX-A Summary of Direct Charitable Activities

| List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc. | Expenses |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|
| <b>1</b>                                                                                                                                                                                                                                               |          |
| <b>2</b>                                                                                                                                                                                                                                               |          |
| <b>3</b>                                                                                                                                                                                                                                               |          |
| <b>4</b>                                                                                                                                                                                                                                               |          |

**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 |
|------------------------------------------------------------------------------------------------------------------|--------|
| <b>1</b>                                                                                                         |        |
|                                                                                                                  |        |
|                                                                                                                  |        |
| <b>2</b>                                                                                                         |        |
|                                                                                                                  |        |
|                                                                                                                  |        |
| All other program-related investments See instructions                                                           |        |
| <b>3</b>                                                                                                         |        |
|                                                                                                                  |        |
|                                                                                                                  |        |

[illegible]

Part X

Minimum Investment Return

(All domestic foundations must complete this part. Foreign foundations,see instructions.)

|          |                                                                                                                    |           |           |
|----------|--------------------------------------------------------------------------------------------------------------------|-----------|-----------|
| <b>1</b> | Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes         |           |           |
| <b>a</b> | Average monthly fair market value of securities. . . . .                                                           | <b>1a</b> | 6,575,861 |
| <b>b</b> | Average of monthly cash balances. . . . .                                                                          | <b>1b</b> | 250,501   |
| <b>c</b> | Fair market value of all other assets (see instructions). . . . .                                                  | <b>1c</b> | 0         |
| <b>d</b> | <b>Total</b> (add lines 1a, b, and c). . . . .                                                                     | <b>1d</b> | 6,826,362 |
| <b>e</b> | Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation). . . . . | <b>1e</b> | 0         |
| <b>2</b> | Acquisition indebtedness applicable to line 1 assets. . . . .                                                      | <b>2</b>  | 0         |
| <b>3</b> | Subtract line 2 from line 1d. . . . .                                                                              | <b>3</b>  | 6,826,362 |
| <b>4</b> | Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions). . . . .  | <b>4</b>  | 102,395   |
| <b>5</b> | <b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3 Enter here and on Part V, line 4         | <b>5</b>  | 6,723,967 |
| <b>6</b> | <b>Minimum investment return.</b> Enter 5% of line 5. . . . .                                                      | <b>6</b>  | 336,198   |

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.)

|           |                                                                                                                  |           |         |
|-----------|------------------------------------------------------------------------------------------------------------------|-----------|---------|
| <b>1</b>  | Minimum investment return from Part X, line 6. . . . .                                                           | <b>1</b>  | 336,198 |
| <b>2a</b> | Tax on investment income for 2015 from Part VI, line 5. . . . .                                                  | <b>2a</b> | 1,889   |
| <b>b</b>  | Income tax for 2015 (This does not include the tax from Part VI ). . . . .                                       | <b>2b</b> |         |
| <b>c</b>  | Add lines 2a and 2b. . . . .                                                                                     | <b>2c</b> | 1,889   |
| <b>3</b>  | Distributable amount before adjustments Subtract line 2c from line 1. . . . .                                    | <b>3</b>  | 334,309 |
| <b>4</b>  | Recoveries of amounts treated as qualifying distributions. . . . .                                               | <b>4</b>  | 0       |
| <b>5</b>  | Add lines 3 and 4. . . . .                                                                                       | <b>5</b>  | 334,309 |
| <b>6</b>  | Deduction from distributable amount (see instructions). . . . .                                                  | <b>6</b>  | 0       |
| <b>7</b>  | <b>Distributable amount</b> as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1. . . . . | <b>7</b>  | 334,309 |

Part XII

Qualifying Distributions (see instructions)

|          |                                                                                                                                                              |           |         |
|----------|--------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|---------|
| <b>1</b> | Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes                                                                    |           |         |
| <b>a</b> | Expenses, contributions, gifts, etc —total from Part I, column (d), line 26. . . . .                                                                         | <b>1a</b> | 336,332 |
| <b>b</b> | Program-related investments—total from Part IX-B. . . . .                                                                                                    | <b>1b</b> | 0       |
| <b>2</b> | Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes. . . . .                                           | <b>2</b>  |         |
| <b>3</b> | Amounts set aside for specific charitable projects that satisfy the                                                                                          |           |         |
| <b>a</b> | Suitability test (prior IRS approval required). . . . .                                                                                                      | <b>3a</b> |         |
| <b>b</b> | Cash distribution test (attach the required schedule). . . . .                                                                                               | <b>3b</b> |         |
| <b>4</b> | <b>Qualifying distributions.</b> Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4                                             | <b>4</b>  | 336,332 |
| <b>5</b> | 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). . . . . | <b>5</b>  | 1,889   |
| <b>6</b> | <b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4. . . . .                                                                               | <b>6</b>  | 334,443 |

**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)<br>Corpus | (b)<br>Years prior to 2014 | (c)<br>2014 | (d)<br>2015 |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|----------------------------|-------------|-------------|
| 1 Distributable amount for 2015 from Part XI, line 7                                                                                                                                |               |                            |             | 334,309     |
| 2 Undistributed income, if any, as of the end of 2015                                                                                                                               |               |                            |             |             |
| a Enter amount for 2014 only. . . . .                                                                                                                                               |               |                            | 329,712     |             |
| b Total for prior years 20____, 20____, 20____                                                                                                                                      |               | 0                          |             |             |
| 3 Excess distributions carryover, if any, to 2015                                                                                                                                   |               |                            |             |             |
| a From 2010. . . . .                                                                                                                                                                |               |                            |             |             |
| b From 2011. . . . .                                                                                                                                                                |               |                            |             |             |
| c From 2012. . . . .                                                                                                                                                                |               |                            |             |             |
| d From 2013. . . . .                                                                                                                                                                |               |                            |             |             |
| e From 2014. . . . .                                                                                                                                                                |               |                            |             |             |
| f Total of lines 3a through e. . . . .                                                                                                                                              | 0             |                            |             |             |
| 4 Qualifying distributions for 2015 from Part XII, line 4 ▶ \$ 336,332                                                                                                              |               |                            |             |             |
| a Applied to 2014, but not more than line 2a                                                                                                                                        |               |                            | 329,712     |             |
| b Applied to undistributed income of prior years (Election required—see instructions). . . . .                                                                                      |               | 0                          |             |             |
| c Treated as distributions out of corpus (Election required—see instructions). . . . .                                                                                              | 0             |                            |             |             |
| d Applied to 2015 distributable amount. . . . .                                                                                                                                     |               |                            |             | 6,620       |
| e Remaining amount distributed out of corpus                                                                                                                                        | 0             |                            |             |             |
| 5 Excess distributions carryover applied to 2015<br>(If an amount appears in column (d), the same amount must be shown in column (a).)                                              | 0             |                            |             | 0           |
| 6 Enter the net total of each column as indicated below:                                                                                                                            |               |                            |             |             |
| a Corpus Add lines 3f, 4c, and 4e Subtract line 5                                                                                                                                   | 0             |                            |             |             |
| b Prior years' undistributed income Subtract line 4b from line 2b. . . . .                                                                                                          |               | 0                          |             |             |
| c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed. . . . . |               | 0                          |             |             |
| d Subtract line 6c from line 6b Taxable amount—see instructions . . . . .                                                                                                           |               | 0                          |             |             |
| e Undistributed income for 2014 Subtract line 4a from line 2a Taxable amount—see instructions . . . . .                                                                             |               |                            | 0           |             |
| f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015. . . . .                                                                |               |                            |             | 327,689     |
| 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions). . . . .       | 0             |                            |             |             |
| 8 Excess distributions carryover from 2010 not applied on line 5 or line 7 (see instructions). . . .                                                                                | 0             |                            |             |             |
| 9 Excess distributions carryover to 2016.<br>Subtract lines 7 and 8 from line 6a. . . . .                                                                                           | 0             |                            |             |             |
| 10 Analysis of line 9                                                                                                                                                               |               |                            |             |             |
| a Excess from 2011. . . . .                                                                                                                                                         |               |                            |             |             |
| b Excess from 2012. . . . .                                                                                                                                                         |               |                            |             |             |
| c Excess from 2013. . . . .                                                                                                                                                         |               |                            |             |             |
| d Excess from 2014. . . . .                                                                                                                                                         |               |                            |             |             |
| e Excess from 2015. . . . .                                                                                                                                                         |               |                            |             |             |

## Part XIV

**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)

|           |                                                                                                                                                             | Prior 3 years |          |          |          | (e) Total |
|-----------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|----------|----------|----------|-----------|
|           |                                                                                                                                                             | (a) 2015      | (b) 2014 | (c) 2013 | (d) 2012 |           |
| <b>2a</b> | Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed . . . . .                         |               |          |          |          |           |
| <b>b</b>  | 85% of line 2a . . . . .                                                                                                                                    |               |          |          |          |           |
| <b>c</b>  | Qualifying distributions from Part XII, line 4 for each year listed . . . . .                                                                               |               |          |          |          |           |
| <b>d</b>  | Amounts included in line 2c not used directly for active conduct of exempt activities . . . . .                                                             |               |          |          |          |           |
| <b>e</b>  | Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c . . . . .                                     |               |          |          |          |           |
| <b>3</b>  | Complete 3a, b, or c for the alternative test relied upon                                                                                                   |               |          |          |          |           |
| <b>a</b>  | "Assets" alternative test—enter                                                                                                                             |               |          |          |          |           |
|           | (1) Value of all assets . . . . .                                                                                                                           |               |          |          |          |           |
|           | (2) Value of assets qualifying under section 4942(j)(3)(B)(i)                                                                                               |               |          |          |          |           |
| <b>b</b>  | "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . . . .                                  |               |          |          |          |           |
| <b>c</b>  | "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) )

**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 e-mail address of the person to whom applications should be addressed

DAN KOVARIK  
10655 NE FOURTH STREET SUITE 510  
BELLEVUE, WA 98004  
(425) 213-1550

**b** The form in which applications should be submitted and information and materials they should include  
WRITTEN REQUEST STATING PURPOSE FOR WHICH THE CONTRIBUTION WILL BE USED

**c** Any submission deadlines  
NONE

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

NONE

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<br>See Additional Data Table |                                                                                                           |                                |                                  |         |
| Total . . . . .                                     |                                                                                                           |                                | 3a                               | 330,917 |
| b Approved for future payment                       |                                                                                                           |                                |                                  |         |
| Total . . . . .                                     |                                                                                                           |                                | 3b                               | 0       |

| Enter gross amounts unless otherwise indicated |                                                                                                                                  | Unrelated business income |               | Excluded by section 512, 513, or 514 |               | (e)<br>Related or exempt<br>function income<br>(See<br>instructions ) |
|------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------|---------------------------|---------------|--------------------------------------|---------------|-----------------------------------------------------------------------|
|                                                |                                                                                                                                  | (a)<br>Business code      | (b)<br>Amount | (c)<br>Exclusion code                | (d)<br>Amount |                                                                       |
| <b>1</b>                                       | Program service revenue                                                                                                          |                           |               |                                      |               |                                                                       |
| <b>a</b>                                       | _____                                                                                                                            |                           |               |                                      |               |                                                                       |
| <b>b</b>                                       | _____                                                                                                                            |                           |               |                                      |               |                                                                       |
| <b>c</b>                                       | _____                                                                                                                            |                           |               |                                      |               |                                                                       |
| <b>d</b>                                       | _____                                                                                                                            |                           |               |                                      |               |                                                                       |
| <b>e</b>                                       | _____                                                                                                                            |                           |               |                                      |               |                                                                       |
| <b>f</b>                                       | _____                                                                                                                            |                           |               |                                      |               |                                                                       |
| <b>g</b>                                       | Fees and contracts from government agencies                                                                                      |                           |               |                                      |               |                                                                       |
| <b>2</b>                                       | Membership dues and assessments. . . . .                                                                                         |                           |               |                                      |               |                                                                       |
| <b>3</b>                                       | Interest on savings and temporary cash<br>investments . . . . .                                                                  |                           |               |                                      |               |                                                                       |
| <b>4</b>                                       | Dividends and interest from securities. . . .                                                                                    |                           |               | 14                                   | 138,066       |                                                                       |
| <b>5</b>                                       | Net rental income or (loss) from real estate                                                                                     |                           |               |                                      |               |                                                                       |
| <b>a</b>                                       | Debt-financed property. . . . .                                                                                                  |                           |               |                                      |               |                                                                       |
| <b>b</b>                                       | Not debt-financed property. . . . .                                                                                              |                           |               |                                      |               |                                                                       |
| <b>6</b>                                       | Net rental income or (loss) from personal<br>property . . . . .                                                                  |                           |               |                                      |               |                                                                       |
| <b>7</b>                                       | Other investment income. . . . .                                                                                                 |                           |               |                                      |               |                                                                       |
| <b>8</b>                                       | Gain or (loss) from sales of assets other than<br>inventory . . . . .                                                            |                           |               | 14                                   | 56,248        |                                                                       |
| <b>9</b>                                       | Net income or (loss) from special events                                                                                         |                           |               |                                      |               |                                                                       |
| <b>10</b>                                      | Gross profit or (loss) from sales of inventory<br>. . . . .                                                                      |                           |               |                                      |               |                                                                       |
| <b>11</b>                                      | Other revenue <b>a</b> _____                                                                                                     |                           |               |                                      |               |                                                                       |
| <b>b</b>                                       | _____                                                                                                                            |                           |               |                                      |               |                                                                       |
| <b>c</b>                                       | _____                                                                                                                            |                           |               |                                      |               |                                                                       |
| <b>d</b>                                       | _____                                                                                                                            |                           |               |                                      |               |                                                                       |
| <b>e</b>                                       | _____                                                                                                                            |                           |               |                                      |               |                                                                       |
| <b>12</b>                                      | Subtotal Add columns (b), (d), and (e). . . .                                                                                    |                           | 0             |                                      | 194,314       | 0                                                                     |
| <b>13</b>                                      | <b>Total.</b> Add line 12, columns (b), (d), and (e). . . . .<br>(See worksheet in line 13 instructions to verify calculations ) |                           |               | <b>13</b>                            |               | 194,314                                                               |

[illegible]

l. Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

(1) Cash. . . . .

(2) Other assets. . . . .

**b Other transactions**

**(1) Sales of assets to a noncharitable exempt organization.** . . . . .

**(2) Purchases of assets from a noncharitable exempt organization.** . . . . .

**(3) Rental of facilities, equipment, or other assets.** . . . . .

**(4) Reimbursement arrangements.** . . . . .

**(5) Loans or loan guarantees.** . . . . .

**(6) Performance of services or membership or fundraising solicitations.** . . . . .

**c** Sharing of facilities, equipment, mailing lists, other assets, or paid employees. . . . .

**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.

**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

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.

# Sign Here

\* \* \* \* \*

2016-05-03

\* \* \* \* \*

Signature of officer or trustee

DateTitle

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

**Paid  
Preparer  
Use  
Only**

Print/Type preparer's name  
SCOTT S KIM CPA

Preparer's Signature

Date  
2016-05-03

Check if self-employed ☐

PTIN P00283218

Firm's name   
KOVARIK & KIM PLLC

Firm's EIN 80-0038878

Firm's address 10655 NE FOURTH STREET SUITE 510 BELLEVUE, WA 98004

Phone no (425) 213-1550

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,<br>(a) 2-story brick warehouse, or common stock, 200 shs MLC Co ) | How acquired<br>P—Purchase<br>(b) D—Donation | Date acquired<br>(c) (mo , day, yr ) | (d)<br>Date sold<br>(mo , day, yr ) |
|--------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------|--------------------------------------|-------------------------------------|
| CHARLES SCHWAB #9857                                                                                                                 |                                              |                                      |                                     |
| CHARLES SCHWAB #9857                                                                                                                 |                                              |                                      |                                     |
| CHARLES SCHWAB #9857- MARKET DISCOUNT                                                                                                |                                              |                                      |                                     |
| CHARLES SCHWAB #9857                                                                                                                 |                                              |                                      |                                     |
| CHARLES SCHWAB #9296                                                                                                                 |                                              |                                      |                                     |
| CHARLES SCHWAB #9296                                                                                                                 |                                              |                                      |                                     |
| CHARLES SCHWAB #9296                                                                                                                 |                                              |                                      |                                     |
| CAPITAL GAINS DIVIDENDS                                                                                                              | P                                            |                                      |                                     |

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

| (e) Gross sales price | Depreciation allowed<br>(f) (or allowable) | Cost or other basis<br>(g) plus expense of sale | Gain or (loss)<br>(h) (e) plus (f) minus (g) |
|-----------------------|--------------------------------------------|-------------------------------------------------|----------------------------------------------|
| 172,760               |                                            | 172,701                                         | 59                                           |
| 81,714                |                                            | 81,101                                          | 613                                          |
|                       |                                            |                                                 | -101                                         |
| 101,102               |                                            | 100,931                                         | 171                                          |
| 472,942               |                                            | 520,000                                         | -47,058                                      |
| 2,730,127             |                                            | 2,814,387                                       | -84,260                                      |
| 771,730               |                                            | 618,945                                         | 152,785                                      |
| 34,039                |                                            |                                                 | 34,039                                       |

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)<br>Gains (Col (h) gain minus<br>col (k), but not less than -0-) or<br>Losses (from col (h)) |
|---------------------------------------------------------------------------------------------|--------------------------------------|-----------------------------------------------|-------------------------------------------------------------------------------------------------|
| (i) F M V as of 12/31/69                                                                    | Adjusted basis<br>(j) as of 12/31/69 | Excess of col (i)<br>(k) over col (j), if any |                                                                                                 |
|                                                                                             |                                      |                                               | 59                                                                                              |
|                                                                                             |                                      |                                               | 613                                                                                             |
|                                                                                             |                                      |                                               | -101                                                                                            |
|                                                                                             |                                      |                                               | 171                                                                                             |
|                                                                                             |                                      |                                               | -47,058                                                                                         |
|                                                                                             |                                      |                                               | -84,260                                                                                         |
|                                                                                             |                                      |                                               | 152,785                                                                                         |
|                                                                                             |                                      |                                               | 34,039                                                                                          |

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)                                                    |                                                                                                           |                                |                                                 |         |
| <b>a</b> Paid during the year                                                          |                                                                                                           |                                |                                                 |         |
| 3500RG 20 JAY ST SUITE 1010<br>BROOKLYN,NY 11201                                       | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,000   |
| ACLU OF WASHINGTON<br>FOUNDATION<br>705 - 2ND AVENUE 3RD FLOOR<br>SEATTLE,WA 98104     | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,000   |
| ARTS CORPS<br>4408 DELRIDGE WAY SW 110<br>SEATTLE,WA 98106                             | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 500     |
| BOOK-IT REPERTORY THEATRE<br>305 HARRISON ST<br>SEATTLE,WA 98109                       | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 500     |
| BUSH SCHOOL<br>3400 E HARRISON ST<br>SEATTLE,WA 98112                                  | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 7,500   |
| CAIR PROJECT THE PO BOX 17121<br>SEATTLE,WA 98127                                      | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 250     |
| CAPITAL HILL HOUSING<br>1620 12TH AVENUE SUITE 205<br>SAN FRANCISCO,WA 98122           | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 2,500   |
| CASA LATINA<br>317 17TH AVENUE SOUTH<br>SAN FRANCISCO,WA 98144                         | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 500     |
| CENTER FOR CHILD & YOUTH JUSTICE<br>615 2ND AVE 275<br>SEATTLE,WA 98104                | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,000   |
| CHELAN-DOUGLAS LAND TRUST<br>18 N WENATCHEE AVE<br>WENATCHEE,WA 98807                  | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 5,000   |
| CHILDCARE RESOURCES<br>1225 S WELLER ST<br>SEATTLE,WA 98144                            | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 250     |
| CLIMATE SOLUTIONS<br>1601 SECOND AVE SUITE 615<br>SEATTLE,WA 98101                     | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 82,000  |
| COLLEGE ACCESS NOW<br>7203 LEDROIT COURT SW<br>SEATTLE,WA 98136                        | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,000   |
| COLLEGE SUCCESS FOUNDATION<br>1605 NW SAMMAMISH ROAD<br>SUITE 200<br>ISSAQUAH,WA 98027 | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 6,250   |
| CONSERVATION CANINES (VIA UW FOUNDATION)<br>BOX 351800<br>SEATTLE,WA 98195             | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 800     |
| <b>Total . . . . .</b>                                                                 |                                                                                                           |                                |                                                 | 330,917 |

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)                                        |                                                                                                           |                                |                                                 |         |
| <b>a</b> Paid during the year                                              |                                                                                                           |                                |                                                 |         |
| CONSERVATION NORTHWEST<br>3600 15TH AVE WEST 101<br>SEATTLE,WA 98119       | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 5,000   |
| COOLMOM PO BOX 12122<br>SEATTLE,WA 98102                                   | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,000   |
| CORAL REEF ALLIANCE<br>1330 BROADWAY SUITE 1602<br>OAKLAND,CA 94612        | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 500     |
| DAILY CLIMATE<br>421 PARK STREET SUITE 4<br>CHARLOTTESVILLE,VA 22902       | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 250     |
| DOCTORS WITHOUT BOARDERS<br>333 7TH AVENUE<br>NEW YORK,NY 10001            | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 3,000   |
| EARTH JUSTICE 426 17TH STREET<br>OAKLAND,CA 94612                          | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 3,000   |
| ENVIRONMENTAL DEFENSE FUND<br>257 PARK AVENUE SOUTH<br>NEW YORK,NY 10010   | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,000   |
| EXHALE<br>1714 FRANKLIN ST 100-141<br>OAKLAND,CA 94612                     | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,000   |
| FAMILIES OF COLOR<br>5623 RAINIER AVE S<br>SEATTLE,WA 98118                | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 500     |
| FOOD BANK AT ST MARY'S<br>611 20TH AVE S<br>SEATTLE,WA 98144               | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,000   |
| FOOD LIFELINE<br>1702 NE 150TH STREET<br>SHORELINE,WA 98155                | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,000   |
| FORTERRA<br>1119 PACIFIC AVE 1300<br>TACOMA,WA 98402                       | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,000   |
| FRED HUTCHINSON CANCER RESEARCH<br>1100 FAIRVIEW AVE N<br>SEATTLE,WA 98109 | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,000   |
| FULL LIFE CARE<br>800 JEFFERSON ST<br>SEATTLE,WA 98104                     | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 500     |
| FUSE INNOVATION FUND<br>1402 THIRD AVENUE 510<br>SEATTLE,WA 98101          | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 8,000   |
| <b>Total . . . . .</b>                                                     |                                                                                                           |                                |                                                 | 330,917 |

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)                                                        |                                                                                                           |                                |                                                 |         |
| <b>a</b> Paid during the year                                                              |                                                                                                           |                                |                                                 |         |
| FUTUREWISE<br>816 SECOND AVE STE 200<br>SEATTLE,WA 98104                                   | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 2,500   |
| GIRE 651 YOLANDA AVENUE<br>SANTA ROSA,CA 95404                                             | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 250     |
| GLOBAL ADE<br>8094 N BURLINGTON AVE<br>PORTLAND,OR 97203                                   | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 500     |
| GREATER SEATTLE BUREAU OF FEARLESS IDEA<br>8414 GREENWOOD AVENUE NORTH<br>SEATTLE,WA 98103 | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,000   |
| GREEN EMPOWERMENT<br>140 SW YAMHILL ST<br>PORTLAND,OR 97204                                | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 250     |
| GRIST 710 SECOND AVE STE 860<br>SEATTLE,WA 98104                                           | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 2,000   |
| HAND IN HAND FOR SYRIA<br>1 OLYMPIC WAY<br>LONDON<br>UK                                    | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,000   |
| KUOWNPR<br>4518 UNIVERSITY WAY NE SUITE 310<br>SEATTLE,WA 98105                            | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,500   |
| LAKE WASHINGTON GIRLS MIDDLE SCHOOL<br>810 18TH AVE<br>SEATTLE,WA 98122                    | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 500     |
| LANDESA<br>1424 FOURTH AVENUE SUITE 300<br>SEATTLE,WA 98101                                | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,000   |
| LATINO COMMUNITY FUND<br>PO BOX 30669<br>SEATTLE,WA 98103                                  | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 5,000   |
| LEGAL VOICE<br>907 PINE STREET SUITE 500<br>SEATTLE,WA 98101                               | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 5,000   |
| MERCY CORP<br>PO BOX 2669 DEPT W<br>PORTLAND,OR 97208                                      | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,000   |
| NARAL PRO-CHOICE<br>WASHINGTON<br>811 1ST AVE 456<br>SEATTLE,WA 98104                      | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,500   |
| NATURAL RESOURCES DEFENSE COUNCIL<br>40 WEST 20TH STREET<br>NEW YORK,NY 10011              | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,000   |
| <b>Total . . . . .</b>                                                                     |                                                                                                           |                                |                                                 | 330,917 |

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)                                                                                    |                                                                                                           |                                |                                                 |         |
| <b>a</b> Paid during the year                                                                                          |                                                                                                           |                                |                                                 |         |
| NATURE CONSERVANCY<br>4245 N FAIRFAX DRIVE SUITE 100<br>ARLINGTON,VA 22203                                             | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,000   |
| NEIGHBORCARE HEALTH<br>905 SPRUCE ST STE 300<br>SEATTLE,WA 98104                                                       | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,500   |
| NORTHWEST ENERGY COALITION<br>811 1ST AVE SUITE 305<br>SEATTLE,WA 98104                                                | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,000   |
| ONE AMERICA<br>1227 WELLER STREET<br>SEATTLE,WA 98144                                                                  | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 7,500   |
| ONE BY ONE<br>1390 E MALLORY LANE<br>MERIDIAN,ID 83642                                                                 | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,000   |
| OPEN ARMS PERINATAL SERVICES<br>2524 16TH AVE S 207A<br>SEATTLE,WA 98144                                               | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,000   |
| OREGON CLIMATE<br>333 SE 2ND AVE<br>PORTLAND,OR 97214                                                                  | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 350     |
| OUTRIGHT ACTION<br>INTERNATIONAL (IGLHRC<br>80 MAIDEN LANE SUITE 1505<br>NEW YORK,NY 10038                             | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,000   |
| OXFAM AMERICA<br>226 CAUSEWAY STREET 5TH FLOOR<br>ARLINGTON,MA 02114                                                   | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,000   |
| PANDRILLUS FOUNDATION<br>PO BOX 10082<br>PORTLAND,OR 97296                                                             | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 750     |
| PEACE TREES VIETNAM<br>509 OLIVE WAY 1226<br>SEATTLE,WA 98101                                                          | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 500     |
| PLYMOUTH HOUSING GROUP<br>1524 1ST AVENUE<br>SEATTLE,WA 98101                                                          | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 500     |
| POWERFUL VOICES<br>1620 - 18TH AVENUE SUITE 100<br>SEATTLE,WA 98122                                                    | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 25,000  |
| PRIDE FOUNDATION<br>1122 E PIKE STREET PMB 1001<br>SEATTLE,WA 98122                                                    | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,000   |
| PUGET SOUND SAGE<br>1032 S JACKSON ST 203<br>SEATTLE,WA 98101                                                          | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 2,500   |
| <b>Total . . . . .</b>  <b>3a</b> |                                                                                                           |                                |                                                 | 330,917 |

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)                                                                                    |                                                                                                           |                                |                                                 |         |
| <b>a</b> Paid during the year                                                                                          |                                                                                                           |                                |                                                 |         |
| RAINER SCHOLARS<br>2100 24TH AVE S 360<br>SEATTLE,WA 98144                                                             | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,000   |
| REAL CHANGE 2129 2ND AVE<br>SEATTLE,WA 98121                                                                           | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 6,000   |
| REEL GRRLS 1409 21ST AVE<br>SEATTLE,WA 98122                                                                           | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,500   |
| RISE BEYOND THE REEF<br>500 UNION STREET STE 801<br>SEATTLE,WA 98101                                                   | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 2,500   |
| SCOPE HEALTH BOX 358045<br>SEATTLE,WA 98195                                                                            | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 500     |
| SEATTLE CHILDREN'S HOSPITAL<br>4800 SAND POINT WAY NE<br>SEATTLE,WA 98105                                              | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 267     |
| SEATTLE GIRLS SCHOOL<br>2706 S JACKSON ST<br>SEATTLE,WA 98144                                                          | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,000   |
| SEATTLE GOOD BUSINESS NETWORK<br>220 2ND AVENUE SOUTH SUITE 202<br>SEATTLE,WA 98104                                    | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 2,500   |
| SEATTLE TILTH<br>4649 SUNNYSIDE AVE N<br>SEATTLE,WA 98103                                                              | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 500     |
| SIGHTLINE INSTITUTE<br>1402 THIRD AVENUE SUITE 500<br>SEATTLE,WA 98101                                                 | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 7,500   |
| SKAGITONIANS TO PRESERVE FARM LAND<br>414 SNOQUALMIE ST<br>MT VERNON,WA 98273                                          | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 250     |
| SOCIAL JUSTICE FUND<br>1904 THIRD AVE STE 806<br>SEATTLE,WA 98101                                                      | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 6,000   |
| SOCIAL VENTURE PARTNERS<br>220 2ND AVENUE SOUTH<br>SEATTLE,WA 98104                                                    | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 500     |
| SOLID GROUND 1501 N 45TH ST<br>SEATTLE,WA 98103                                                                        | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,000   |
| SOUTHERN POVERTY LAW CENTER<br>400 WASHINGTON AVE<br>MONTGOMERY,AL 36104                                               | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 300     |
| <b>Total . . . . .</b>  <b>3a</b> |                                                                                                           |                                |                                                 | 330,917 |

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)                                                                                    |                                                                                                           |                                |                                                 |         |
| <b>a</b> Paid during the year                                                                                          |                                                                                                           |                                |                                                 |         |
| TEAM CHILD<br>1225 SOUTH WELLER ST STE 420<br>SEATTLE,WA 98144                                                         | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 500     |
| TEAM READ PO BOX 94042<br>SEATTLE,WA 98124                                                                             | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,000   |
| TECHNOLOGY ACCESS FOUNDATION<br>4436 RAINIER AVENUE SOUTH<br>SEATTLE,WA 98118                                          | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 2,500   |
| THE SERVICE BOARD<br>4408 DELRIDGE WAY SW 100<br>SEATTLE,WA 98106                                                      | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,000   |
| THORNE NATURE EXPERIENCE<br>1466 63RD ST<br>BOULDER,CO 80303                                                           | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,000   |
| TOWN HALL ASSOCIATION<br>1119 8TH AVE<br>SEATTLE,WA 98101                                                              | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,000   |
| UNION OF CONCERNED SCIENTISTS<br>TWO BRATTLE SQ<br>CAMBRIDGE,MA 02138                                                  | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 500     |
| UW SCHOOL OF SOCIAL WORK<br>4101 15TH AVENUE NE<br>SEATTLE,WA 98105                                                    | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 2,500   |
| VIETNAMESE FREINDSHIP ASSOCIATION<br>3829 S EDMUNDS ST<br>SEATTLE,WA 98118                                             | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 250     |
| VOICE FOR PROGRESS ED FUND<br>1220 19TH STREET NW 205<br>WASHINGTON,WA 20036                                           | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,750   |
| VOLUNTEER PARK TRUST (SEATTLE PARK FOUNDATION)<br>105 SOUTH MAIN STREET 235<br>SEATTLE,WA 98104                        | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 250     |
| WASHINGTON BUS EDUCATION FUND<br>PO BOX 20188<br>SEATTLE,WA 98102                                                      | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 10,000  |
| WASHINGTON ENVIRONMENTAL COUNCIL<br>1402 THIRD AVE SUITE 1400<br>SEATTLE,WA 98101                                      | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 2,500   |
| WASHINGTON GREEN SCHOOLS<br>4649 SUNNYSIDE AVE N SUITE 100<br>SEATTLE,WA 98103                                         | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,000   |
| WASHINGTON PROGRESS ALLIANCE<br>1402 THIRD AVE SUITE 515<br>SEATTLE,WA 98101                                           | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 36,500  |
| <b>Total . . . . .</b>  <b>3a</b> |                                                                                                           |                                |                                                 | 330,917 |

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)                                                      |                                                                                                           |                                |                                                 |         |
| <b>a</b> Paid during the year                                                            |                                                                                                           |                                |                                                 |         |
| WASHINGTON STATE BUGET & POLICY CENTER<br>1402 THIRD AVENUE STE 1215<br>SEATTLE,WA 98101 | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 3,000   |
| WASHINGTON SUSTAINABLE FOOD & FARMING NETWORK<br>419 S 1ST ST 201<br>MT VERNON,WA 98273  | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 500     |
| WASHINGTON TOXICS COALITION<br>4649 SUNNYSIDE AVEN N<br>SEATTLE,WA 98103                 | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,500   |
| WASHINGTON TRAILS ASSOCIATION<br>705 2ND AVE 300<br>SEATTLE,WA 98104                     | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 250     |
| WHITMAN COLLEGE<br>345 BOYER AVE<br>WALLA WALLA,WA 99362                                 | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 3,000   |
| WIKIMEDIA FOUNDATION<br>149 NEW MONTGOMERY STREET<br>SAN FRANCISCO,CA 94105              | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 500     |
| WILDERNESS LAND TRUST<br>123 EMMA RD 200<br>BASALT,CO 81621                              | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 1,000   |
| WIN WIN NETWORK<br>1402 THIRD AVE SUITE 201<br>SEATTLE,WA 98101                          | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 7,500   |
| WOODLAND PARK ZOO<br>601 N 59TH STREET<br>SEATTLE,WA 98103                               | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 4,700   |
| YALE UNIVERSITY<br>265 CHURCH STREET SUITE 901<br>NEW HAVEN,CT 06511                     | NONE                                                                                                      | PC                             | CONTRIBUTION TO BE USED FOR CHARITABLE PURPOSES | 8,000   |
| <b>Total . . . . .</b>                                                                   |                                                                                                           |                                |                                                 | 330,917 |

**TY 2015 Accounting Fees Schedule****Name:** SB SCHAAR & PK WHELPTON FOUNDATION

C/O DAN KOVARIK

**EIN:** 91-6468169

| Category        | Amount | Net Investment<br>Income | Adjusted Net<br>Income | Disbursements for<br>Charitable<br>Purposes |
|-----------------|--------|--------------------------|------------------------|---------------------------------------------|
| ACCOUNTING FEES | 3,555  | 1,778                    |                        | 1,777                                       |

## TY 2015 Investments - Other Schedule

**Name:** SB SCHAAR & PK WHELPTON FOUNDATION

C/O DAN KOVARIK

**EIN:** 91-6468169

| Category / Item                                     | Listed at Cost or<br>FMV | Book Value | End of Year Fair<br>Market Value |
|-----------------------------------------------------|--------------------------|------------|----------------------------------|
| CHARLES SCHWAB INVESTMENT ACCOUNT                   | AT COST                  | 5,301,267  | 5,188,920                        |
| CHARLES SCHWAB INVESTMENT ACCOUNT - FIXED<br>INCOME | AT COST                  | 910,416    | 907,208                          |

## TY 2015 Other Expenses Schedule

**Name:** SB SCHAAR & PK WHELPTON FOUNDATION

C/O DAN KOVARIK

**EIN:** 91-6468169

| Description              | Revenue and Expenses<br>per Books | Net Investment<br>Income | Adjusted Net Income | Disbursements for<br>Charitable Purposes |
|--------------------------|-----------------------------------|--------------------------|---------------------|------------------------------------------|
| WASH STATE FILING FEE    | 25                                | 13                       |                     | 12                                       |
| MANAGEMENT AND BANK FEES | 3,525                             | 1,763                    |                     | 1,762                                    |

## TY 2015 Other Liabilities Schedule

**Name:** SB SCHAAR & PK WHELPTON FOUNDATION

C/O DAN KOVARIK

**EIN:** 91-6468169

| Description           | Beginning of Year -<br>Book Value | End of Year - Book<br>Value |
|-----------------------|-----------------------------------|-----------------------------|
| FOREIGN TAXES PAYABLE | 4,409                             | 3,728                       |

# TY 2015 Substantial Contributors Schedule

**Name:** SB SCHAAR & PK WHELPTON FOUNDATION  
C/O DAN KOVARIK

**EIN:** 91-6468169

| Name            | Address                                          |
|-----------------|--------------------------------------------------|
| JABE BLUMENTHAL | 10655 NE FOURTH ST STE 510<br>BELLEVUE, WA 98004 |
| JULIE EDSFORTH  | 10655 NE FOURTH ST STE 510<br>BELLEVUE, WA 98004 |

# TY 2015 Taxes Schedule

**Name:** SB SCHAAR & PK WHELPTON FOUNDATION

C/O DAN KOVARIK

**EIN:** 91-6468169

| Category      | Amount | Net Investment<br>Income | Adjusted Net<br>Income | Disbursements for<br>Charitable<br>Purposes |
|---------------|--------|--------------------------|------------------------|---------------------------------------------|
| FOREIGN TAXES | 3,728  | 1,864                    |                        | 1,864                                       |