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For calendar year 2015, or tax year beginning 07-01-2015 , and ending 06-30-2016

Name of foundation ROBERT SCHALKENBACH FOUNDATION INC		A Employer identification number 13-1656331	
Number and street (or P O box number if mail is not delivered to street address) 211 EAST 43RD STREET NO 400		Room/suite	B Telephone number (see instructions) (212) 683-6424
City or town, state or province, country, and ZIP or foreign postal code NEW YORK, NY 10017		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐ E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 16,209,238		J Accounting method ☐ Cash ☒ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis)	

Part I Analysis of Revenue and Expenses <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</i>		Revenue and expenses per books (a)	Net investment income (b)	Adjusted net income (c)	Disbursements for charitable purposes (d) (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	229,782			
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	243,125	243,125	243,125	
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	292,442			
	b Gross sales price for all assets on line 6a 2,080,912				
	7 Capital gain net income (from Part IV , line 2)		292,442		
	8 Net short-term capital gain			121,848	
	9 Income modifications				
	10a Gross sales less returns and allowances 20,866				
Operating and Administrative Expenses	b Less Cost of goods sold	28,124			
	c Gross profit or (loss) (attach schedule)	-7,258		-7,258	
	11 Other income (attach schedule)	2,607	0	2,607	
	12 Total. Add lines 1 through 11	760,698	535,567	360,322	
	13 Compensation of officers, directors, trustees, etc	84,000	1,680	1,680	82,320
	14 Other employee salaries and wages	148,134	3,935	3,935	142,853
	15 Pension plans, employee benefits	65,369	653	653	91,360
	16a Legal fees (attach schedule).	2,720	0	0	2,720
	b Accounting fees (attach schedule).	16,735	2,653	2,653	14,302
	c Other professional fees (attach schedule)	20,344	18,394	18,394	1,950
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	10,328	0	0	17,132
	19 Depreciation (attach schedule) and depletion . . .	1,446	25	25	
	20 Occupancy	88,805	1,565	1,565	82,149
	21 Travel, conferences, and meetings.	29,586	521	521	28,150
	22 Printing and publications				
	23 Other expenses (attach schedule).	167,889	623	623	180,560
	24 Total operating and administrative expenses. Add lines 13 through 23	635,356	30,049	30,049	643,496
	25 Contributions, gifts, grants paid	6,000			6,000
	26 Total expenses and disbursements. Add lines 24 and 25	641,356	30,049	30,049	649,496
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	119,342			
	b Net investment income (if negative, enter -0-)		505,518		
c Adjusted net income (if negative, enter -0-)				330,273	

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		93,972	147,526	147,526
	2	Savings and temporary cash investments		95,045		
	3	Accounts receivable ▶ <u>10,630</u>				
		Less allowance for doubtful accounts ▶ _____		14,289	10,630	10,630
	4	Pledges receivable ▶ _____				
		Less allowance for doubtful accounts ▶ _____		7,772		
	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		60,964	70,249	70,249
	9	Prepaid expenses and deferred charges		5,548	8,563	8,563
	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)		11,075,978	10,695,900	10,695,900	
14	Land, buildings, and equipment basis ▶ <u>37,850</u>					
	Less accumulated depreciation (attach schedule) ▶ <u>33,587</u>		2,973	4,263	4,263	
15	Other assets (describe ▶ _____)		5,730,349	5,272,107	5,272,107	
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)		17,086,890	16,209,238	16,209,238	
Liabilities	17	Accounts payable and accrued expenses		43,956	34,205	
	18	Grants payable				
	19	Deferred revenue			18,135	
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable (attach schedule)				
	22	Other liabilities (describe ▶ _____)		185,888	253,819	
	23	Total liabilities (add lines 17 through 22)		229,844	306,159	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☒					
	and complete lines 24 through 26 and lines 30 and 31.					
	24	Unrestricted		11,178,858	10,648,034	
	25	Temporarily restricted		5,678,188	5,255,045	
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here ▶ ☐					
	and complete lines 27 through 31.					
	27	Capital stock, trust principal, or current funds				
	28	Paid-in or capital surplus, or land, bldg, and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds				
30	Total net assets or fund balances (see instructions)		16,857,046	15,903,079		
31	Total liabilities and net assets/fund balances (see instructions)		17,086,890	16,209,238		

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	16,857,046
2	Enter amount from Part I, line 27a	2	119,342
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	16,976,388
5	Decreases not included in line 2 (itemize) ▶ _____	5	1,073,309
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	15,903,079

Part IV

Capital Gains and Losses for Tax on Investment Income

List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)		How acquired P—Purchase (b) D—Donation	Date acquired (c) (mo , day, yr)	Date sold (d) (mo , day, yr)
1 a	PUBLICLY TRADED MUTUAL FUND			
b	CAPITAL GAIN DIVIDENDS	P		
c	PUBLICLY TRADED MUTUAL FUND			
d	CAPITAL GAIN DIVIDENDS	P		
e				

(e) Gross sales price	Depreciation allowed (f) (or allowable)	Cost or other basis (g) plus expense of sale	Gain or (loss) (h) (e) plus (f) minus (g)
a 1,761,225		1,644,737	116,488
b 145,170			145,170
c 169,157		143,733	25,424
d 5,360			5,360
e			

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

(i) F M V as of 12/31/69	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	Gains (Col (h) gain minus col (k), but not less than -0-) or (l) Losses (from col (h))
a			116,488
b			145,170
c			25,424
d			5,360
e			

2	Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	292,442
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	121,848

Part V

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

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)
If section 4940(d)(2) applies, leave this part blank

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2014	665,535	11,305,336	0 058869
2013	635,500	10,088,121	0 062995
2012	645,949	9,880,937	0 065373
2011	683,865	10,488,330	0 065202
2010	674,492	11,022,772	0 061191

2	Total of line 1, column (d).	2	0 313630
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 062726
4	Enter the net value of noncharitable-use assets for 2015 from Part X, line 5.	4	10,754,838
5	Multiply line 4 by line 3.	5	674,608
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	5,055
7	Add lines 5 and 6.	7	679,663
8	Enter qualifying distributions from Part XII, line 4.	8	652,232

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 VII

Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b		1	10,110
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	10,110
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	10,110
6 Credits/Payments			
a 2015 estimated tax payments and 2014 overpayment credited to 2015	6a	12,104	
b Exempt foreign organizations—tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868).	6c	1,500	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments Add lines 6a through 6d.		7	13,604
8 Enter any penalty for underpayment of estimated tax Check here ☐ if Form 2220 is attached		8	88
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	3,406
11 Enter the amount of line 10 to be Credited to 2015 estimated tax ☐ 3,406 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	Yes	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	Yes	
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) ☐ NY			
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	Yes	
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>WWW.SCHALKENBACH.ORG</u>	13	Yes	
14	The books are in care of ► <u>MARK A SULLIVAN</u> Telephone no ► <u>(212) 683-6424</u> Located at ► <u>211 EAST 43RD STREET SUITE 400 NEW YORK NY</u> ZIP+4 ► <u>10017</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ► ☐ and enter the amount of tax-exempt interest received or accrued during the year ► 15			
16	At any time during calendar year 2015, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR). If "Yes", enter the name of the foreign country ►	16	Yes	No

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☒ Yes ☐ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? ☐ Organizations relying on a current notice regarding disaster assistance check here. ► ☐	1b		No
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2015?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015? ☐ Yes ☒ No If "Yes," list the years ► 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2015 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015</i>).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		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
See Additional Data Table				

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
PETER MINTER 211 EAST 43RD STREET NEW YORK, NY 10017	IT MANAGER/WEBMASTER 40 00	64,976	9,185	0
JACOB SCHWARTZ-LUCAS 211 EAST 43RD STREET NEW YORK, NY 10017	OUTREACH COORDINATOR 40 00	53,354	9,185	0

Total number of other employees paid over \$50,000. 	0
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Part VIII

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services. ▶		0

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 THE FOUNDATION PROMOTES THE SOCIAL AND ECONOMIC PHILOSOPHY OF HENRY GEORGE AND OTHER RELATED ECONOMISTS BY CONTRACTING THE SERVICES OF AND MAKING GRANTS TO SCHOLARS, WRITERS AND OTHERS FOR PUBLISHING, RESEARCH AND OUTREACH PROJECTS	56,226
2 THE FOUNDATION CONDUCTS EDUCATION AND OUTREACH ACTIVITIES TO PROMOTE THE SOCIAL AND ECONOMIC THEORY OF HENRY GEORGE AND OTHER RELATED ECONOMISTS	261,356
3 THE FOUNDATION SELLS AND DISTRIBUTES BOOKS AND PUBLICATIONS TO PROMOTE THE SOCIAL AND ECONOMIC THEORY OF HENRY GEORGE AND OTHER RELATED ECONOMISTS	117,242
4 THE FOUNDATION SUPPORTS THE JOURNAL OF ECONOMICS AND SOCIOLOGY, INC , WHICH PUBLISHES A QUARTERLY JOURNAL IN THE INTEREST OF CONSTRUCTIVE SYNTHESIS IN THE SOCIAL SCIENCES	13,599

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3 ▶	0

Part X Minimum Investment Return

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	10,751,273
b	Average of monthly cash balances.	1b	131,089
c	Fair market value of all other assets (see instructions).	1c	36,255
d	Total (add lines 1a, b, and c).	1d	10,918,617
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	10,918,617
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	163,779
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	10,754,838
6	Minimum investment return. Enter 5% of line 5.	6	537,742

Part XI Distributable Amount(see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☒ and do not complete this part.)

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

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26.	1a	649,496
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	2,736
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	652,232
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions).	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	652,232

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years

Part XIII

Undistributed Income (see instructions)

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

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

1a

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

b

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

2a

Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

85% of line 2a

c Qualifying distributions from Part XII, line 4 for each year listed

d Amounts included in line 2c not used directly for active conduct of exempt activities

e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c

3

Complete 3a, b, or c for the alternative test relied upon

a "Assets" alternative test—enter

(1) Value of all assets

(2) Value of assets qualifying under section 4942(j)(3)(B)(i)

b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.

c "Support" alternative test—enter

(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).

(3) Largest amount of support from an exempt organization

(4) Gross investment income

Tax year	Prior 3 years				(e) Total
(a) 2015	(b) 2014	(c) 2013	(d) 2012		
330,273	290,860	220,848	267,014	1,108,995	
280,732	247,231	187,721	226,962	942,646	
652,232	665,535	635,500	650,033	2,603,300	
6,000	7,000	12,200	0	25,200	
646,232	658,535	623,300	650,033	2,578,100	
				0	
				0	
358,495	376,845	336,271	329,365	1,400,976	
				0	
				0	
				0	
				0	

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 email address of the person to whom applications should be addressed

b

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

c

Any submission deadlines

d

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

Form **990-PF** (2015)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> HENRY GEORGE INTERNATIONAL EDUCATION CENTER 10 DORIS CIRCLE NEWTON, MA 02458	N/A	PC	GENERAL PROGRAM SUPPORT	1,000
AMERICAN JOURNAL OF ECONOMICS AND SOCIOLOGY INC 211 EAST 43RD STREET NEW YORK, NY 10017	N/A	PC	GENERAL PROGRAM SUPPORT	5,000
Total			▶ 3a	6,000
b <i>Approved for future payment</i>				
Total			▶ 3b	0

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2015)

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

a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash.		1a(1)	No
(2) Other assets.		1a(2)	No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization.		1b(1)	No
(2) Purchases of assets from a noncharitable exempt organization.		1b(2)	No
(3) Rental of facilities, equipment, or other assets.		1b(3)	No
(4) Reimbursement arrangements.		1b(4)	No
(5) Loans or loan guarantees.		1b(5)	No
(6) Performance of services or membership or fundraising solicitations.		1b(6)	No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.		1c	No
d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.			

[illegible]

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

b If "Yes," complete the following schedule

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

Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.		
	*****	2017-05-10	*****
	_____ Signature of officer or trustee	_____ Date	_____ Title

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

Paid Preparer Use Only	Print/Type preparer's name LAUREN CRESCI	Preparer's Signature	Date	Check if self-employed ☐	PTIN P01268493
	Firm's name ▶ LUTZ AND CARR CPAS LLP			Firm's EIN ▶ 13-1655065	
	Firm's address ▶ 300 EAST 42ND STREET NEW YORK, NY 10017			Phone no (212) 697-2299	

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(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
TED GWARTNEY	PRESIDENT 1 00	0	0	0
211 EAST 43RD STREET NEW YORK,NY 10017				
ERICH JACOBY-HAWKINS	VICE PRESIDENT 1 00	0	0	0
211 EAST 43RD STREET NEW YORK,NY 10017				
GREGG ERICKSON	TREASURER 1 00	0	0	0
211 EAST 43RD STREET NEW YORK,NY 10017				
WYN ACHENBAUM	DIRECTOR 1 00	0	0	0
211 EAST 43RD STREET NEW YORK,NY 10017				
BRETT BARKER	DIRECTOR 1 00	0	0	0
211 EAST 43RD STREET NEW YORK,NY 10017				
H WILLIAM BATT	DIRECTOR 1 00	0	0	0
211 EAST 43RD STREET NEW YORK,NY 10017				
JOHN BECK	DIRECTOR 1 00	0	0	0
211 EAST 43RD STREET NEW YORK,NY 10017				
RICHARD BIDDLE	DIRECTOR 1 00	0	0	0
211 EAST 43RD STREET NEW YORK,NY 10017				
DAN CASSINO	DIRECTOR 1 00	0	0	0
211 EAST 43RD STREET NEW YORK,NY 10017				
KRIS FEDER	DIRECTOR 1 00	0	0	0
211 EAST 43RD STREET NEW YORK,NY 10017				
FRED FOLDVARY	DIRECTOR 1 00	0	0	0
211 EAST 43RD STREET NEW YORK,NY 10017				
DAVID GIESEN	DIRECTOR 1 00	0	0	0
211 EAST 43RD STREET NEW YORK,NY 10017				
QUISIA D GONZALEZ	DIRECTOR 1 00	0	0	0
211 EAST 43RD STREET NEW YORK,NY 10017				
LEE HACHADOORIAN	DIRECTOR 1 00	0	0	0
211 EAST 43RD STREET NEW YORK,NY 10017				
GIB HALVERSON	DIRECTOR 1 00	0	0	0
211 EAST 43RD STREET NEW YORK,NY 10017				
BRENDAN HENNIGAN	DIRECTOR 1 00	0	0	0
211 EAST 43RD STREET NEW YORK,NY 10017				
PAUL JUSTUS	DIRECTOR 1 00	0	0	0
211 EAST 43RD STREET NEW YORK,NY 10017				
AL KATZENBERGER	DIRECTOR 1 00	0	0	0
211 EAST 43RD STREET NEW YORK,NY 10017				
RICHARD NYMOEN	DIRECTOR 1 00	0	0	0
211 EAST 43RD STREET NEW YORK,NY 10017				
JORDON PETSAS	DIRECTOR 1 00	0	0	0
211 EAST 43RD STREET NEW YORK,NY 10017				
NICHOLAS ROSEN	DIRECTOR 1 00	0	0	0
211 EAST 43RD STREET NEW YORK,NY 10017				
MARK A SULLIVAN	SECRETARY & ADMIN DIR 40 00	84,000	9,185	0
211 EAST 43RD STREET NEW YORK,NY 10017				

TY 2015 Accounting Fees Schedule

Name: ROBERT SCHALKENBACH FOUNDATION INC

EIN: 13-1656331

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	16,735	2,653	2,653	14,302

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2015 Depreciation Schedule

Name: ROBERT SCHALKENBACH FOUNDATION INC

EIN: 13-1656331

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
OFFICE FURNITURE, COMPUTERS AND EQUIPMENT		37,850	32,141	SL	5 000000000000	1,446	0	1,446	

TY 2015 Investments - Other Schedule**Name:** ROBERT SCHALKENBACH FOUNDATION INC**EIN:** 13-1656331

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
VANGAURD MUTUAL FUND - INTER-TERM INVEST-GR ADM	FMV	895,230	895,230
VANGAURD MUTUAL FUND - SHORT-TERM INVEST-GR ADM	FMV	594,209	594,209
VANGAURD MUTUAL FUND - STRATEGIC EQUITY FUND	FMV	283,714	283,714
VANGAURD MUTUAL FUND - EXPLORER FUND ADMIRAL	FMV	282,816	282,816
VANGAURD MUTUAL FUND - TOTAL INT'L STOCK INDEX	FMV	2,691,936	2,691,936
VANGAURD MUTUAL FUND - TOTAL STOCK MKT IDX ADM	FMV	1,876,886	1,876,886
VANGAURD MUTUAL FUND - U.S. GROWTH FUND ADMIRAL	FMV	645,826	645,826
VANGAURD MUTUAL FUND - WINDSOR II FUND ADM	FMV	655,455	655,455
VANGAURD MUTUAL FUND - TOTAL BOND MKT INDEX ADM	FMV	1,491,784	1,491,784
VANGAURD MUTUAL FUND - TOTAL INT'L BOND INDEX	FMV	1,278,044	1,278,044

TY 2015 Land, Etc. Schedule

Name: ROBERT SCHALKENBACH FOUNDATION INC

EIN: 13-1656331

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
OFFICE FURNITURE, COMPUTERS AND EQUIPMENT	37,850	33,587	4,263	

TY 2015 Legal Fees Schedule**Name:** ROBERT SCHALKENBACH FOUNDATION INC**EIN:** 13-1656331

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PROFESSIONAL LEGAL FEES	2,720	0	0	2,720

TY 2015 Other Assets Schedule**Name:** ROBERT SCHALKENBACH FOUNDATION INC**EIN:** 13-1656331

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
REMAINDER INTEREST IN TRUST	5,678,188	5,255,045	5,255,045
SECURITY DEPOSITS	52,161	17,062	17,062

TY 2015 Other Decreases Schedule**Name:** ROBERT SCHALKENBACH FOUNDATION INC**EIN:** 13-1656331

Description	Amount
UNREALIZED LOSS ON INVESTMENTS	555,858
CHANGE IN VALUE OF INTEREST IN CHARITABLE REMAINDER TRUST	423,143
PERIODIC PENSION RELATED CHANGES OTHER THAN PERIODIC PENSION COSTS	94,308

TY 2015 Other Expenses Schedule**Name:** ROBERT SCHALKENBACH FOUNDATION INC**EIN:** 13-1656331

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TELEPHONE	5,785	102	102	5,683
SUPPLIES	14,523	256	256	14,267
OUTREACH	129,626	0	0	142,245
OFFICE EXPENSES	3,992	32	32	3,763
INSURANCE	6,362	112	112	6,800
POSTAGE & DELIVERY	1,074	19	19	1,055
FUNDRAISING EXPENSES	727	0	0	727
MISCELLANEOUS EXPENSES	5,800	102	102	6,020

TY 2015 Other Income Schedule**Name:** ROBERT SCHALKENBACH FOUNDATION INC**EIN:** 13-1656331

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
MISCELLANEOUS REVENUE	2,607		2,607

TY 2015 Other Liabilities Schedule**Name:** ROBERT SCHALKENBACH FOUNDATION INC**EIN:** 13-1656331

Description	Beginning of Year - Book Value	End of Year - Book Value
ACCRUED PENSION LIABILITY	185,888	253,819

TY 2015 Other Professional Fees Schedule**Name:** ROBERT SCHALKENBACH FOUNDATION INC**EIN:** 13-1656331

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT	18,394	18,394	18,394	0
PENSION CONSULTANT	1,950	0	0	1,950

TY 2015 Taxes Schedule**Name:** ROBERT SCHALKENBACH FOUNDATION INC**EIN:** 13-1656331

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAXES	10,328	0	0	17,132

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF ▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990	OMB No 1545-0047 2015
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Name of the organization ROBERT SCHALKENBACH FOUNDATION INC	Employer identification number 13-1656331
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Organization type (check one)

Filers of: Form 990 or 990-EZ Form 990-PF	Section: ☐ 501(c)() (enter number) organization ☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation ☐ 527 political organization ☒ 501(c)(3) exempt private foundation ☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation ☐ 501(c)(3) taxable private foundation
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Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

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

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. ▶ \$ _____

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization ROBERT SCHALKENBACH FOUNDATION INC	Employer identification number 13-1656331
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Part I Contributors (see instructions) Use duplicate copies of Part I if additional space is needed			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1		\$ 109,141	Person ☒
	NEILSON TRUST FUND A		Payroll ☐
	C/O BANK ONE TRUST 1 BANK ONE PLAZA		Noncash ☐
	CHICAGO, IL 60670		(Complete Part II for noncash contributions)
		\$ 113,821	Person ☒
	NEILSON TRUST FUND B		Payroll ☐
	C/O JP MORGAN TRUST 21 SOUTH CLARK		Noncash ☐
	CHICAGO, IL 60670		(Complete Part II for noncash contributions)
		\$	Person ☐
			Payroll ☐
			Noncash ☐
			(Complete Part II for noncash contributions)
		\$	Person ☐
			Payroll ☐
			Noncash ☐
			(Complete Part II for noncash contributions)
		\$	Person ☐
			Payroll ☐
			Noncash ☐
			(Complete Part II for noncash contributions)
		\$	Person ☐
			Payroll ☐
			Noncash ☐
			(Complete Part II for noncash contributions)
		\$	Person ☐
			Payroll ☐
			Noncash ☐
			(Complete Part II for noncash contributions)

Name of organization ROBERT SCHALKENBACH FOUNDATION INC	Employer identification number 13-1656331
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Part II Noncash Property (see instructions) Use duplicate copies of Part II if additional space is needed			
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	

Name of organization ROBERT SCHALKENBACH FOUNDATION INC	Employer identification number 13-1656331
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Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ► \$ _____

Use duplicate copies of Part III if additional space is needed

(a) No.from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-			
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
	--		
(a) No.from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-			
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
	--		
(a) No.from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-			
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
	--		
(a) No.from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-			
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
	--		