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Form **990-PF**

Department of the Treasury  
Internal Revenue Service

Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation

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OMB No 1545-0052

**2015**

Open to Public Inspection

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

Name of foundation MARSHALL H AND NELLIE ALWORTH MEMORIAL FUND		<b>A</b> Employer identification number 41-0797340
Number and street (or P O box number if mail is not delivered to street address) 402 ALWORTH BUILDING	Room/suite	<b>B</b> Telephone number (see instructions) (218) 722-9366
City or town, state or province, country, and ZIP or foreign postal code DULUTH, MN 55802		<b>C</b> If exemption application is pending, check here <input type="checkbox"/>
<b>G</b> Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		<b>D 1.</b> Foreign organizations, check here <input type="checkbox"/> <b>2.</b> Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/> <b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
<b>H</b> Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		<b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>
<b>I</b> Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ 7,792,530	<b>J</b> Accounting method <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> 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	<b>1</b> Contributions, gifts, grants, etc , received (attach schedule) . . . . .	1,415,828			
	<b>2</b> Check <input type="checkbox"/> if the foundation is <b>not</b> required to attach Sch B . . . . .				
	<b>3</b> Interest on savings and temporary cash investments . . . . .	739	739		
	<b>4</b> Dividends and interest from securities . . . . .	102,315	102,315		
	<b>5a</b> Gross rents . . . . .				
	<b>b</b> Net rental income or (loss) _____				
	<b>6a</b> Net gain or (loss) from sale of assets not on line 10 _____	29,336			
	<b>b</b> Gross sales price for all assets on line 6a 1,026,246				
	<b>7</b> Capital gain net income (from Part IV, line 2) . . . . .		29,336		
	<b>8</b> Net short-term capital gain . . . . .				
	<b>9</b> Income modifications . . . . .				
	<b>10a</b> Gross sales less returns and allowances				
Operating and Administrative Expenses	<b>b</b> Less Cost of goods sold . . . . .				
	<b>c</b> Gross profit or (loss) (attach schedule) . . . . .				
	<b>11</b> Other income (attach schedule) . . . . .	 178,102	178,102		
	<b>12 Total.</b> Add lines 1 through 11 . . . . .	1,726,320	310,492		
	<b>13</b> Compensation of officers, directors, trustees, etc . . . . .	61,899	9,285		52,614
	<b>14</b> Other employee salaries and wages . . . . .	28,336	4,250		24,086
	<b>15</b> Pension plans, employee benefits . . . . .				
	<b>16a</b> Legal fees (attach schedule). . . . .	 2,108			
	<b>b</b> Accounting fees (attach schedule). . . . .	 7,275	7,275		
	<b>c</b> Other professional fees (attach schedule) . . . . .	 40,982	40,982		
	<b>17</b> Interest . . . . .				
	<b>18</b> Taxes (attach schedule) (see instructions) . . . . .	 12,748	2,298		5,797
	<b>19</b> Depreciation (attach schedule) and depletion . . . . .	 601	601		
	<b>20</b> Occupancy . . . . .	13,124	6,562		6,562
	<b>21</b> Travel, conferences, and meetings . . . . .	7,967			7,967
	<b>22</b> Printing and publications . . . . .	3,681			3,681
	<b>23</b> Other expenses (attach schedule). . . . .	 25,397	6,260		19,137
	<b>24 Total operating and administrative expenses.</b> Add lines 13 through 23 . . . . .	204,118	77,513		119,844
	<b>25</b> Contributions, gifts, grants paid . . . . .	1,150,500			1,150,500
	<b>26 Total expenses and disbursements.</b> Add lines 24 and 25	1,354,618	77,513		1,270,344
	<b>27</b> Subtract line 26 from line 12				
	<b>a Excess of revenue over expenses and disbursements</b>	371,702			
	<b>b Net investment income</b> (if negative, enter -0- )		232,979		
	<b>c Adjusted net income</b> (if negative, enter -0- ) . . . .				

<b>Part II</b> <b>Balance Sheets</b>		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
<b>Assets</b>	<b>1</b>	Cash—non-interest-bearing . . . . .			
	<b>2</b>	Savings and temporary cash investments . . . . .	892,109	1,091,479	1,091,479
	<b>3</b>	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	<b>4</b>	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	<b>5</b>	Grants receivable . . . . .			
	<b>6</b>	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions). . . . .			
	<b>7</b>	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	<b>8</b>	Inventories for sale or use . . . . .			
	<b>9</b>	Prepaid expenses and deferred charges . . . . .			
	<b>10a</b>	Investments—U S and state government obligations (attach schedule)			
	<b>b</b>	Investments—corporate stock (attach schedule) . . . . .			
	<b>c</b>	Investments—corporate bonds (attach schedule) . . . . .			
	<b>11</b>	Investments—land, buildings, and equipment basis ▶ _____ 534,827 Less accumulated depreciation (attach schedule) ▶ _____ 484,303	50,524	50,524	50,524
	<b>12</b>	Investments—mortgage loans . . . . .			
	<b>13</b>	Investments—other (attach schedule) . . . . .	6,628,047	6,578,325	6,578,325
	<b>14</b>	Land, buildings, and equipment basis ▶ _____ 23,007 Less accumulated depreciation (attach schedule) ▶ _____ 20,415	1,365	2,592	2,592
<b>Liabilities</b>	<b>15</b>	Other assets (describe ▶ _____)	2,125	69,610	69,610
	<b>16</b>	<b>Total assets</b> (to be completed by all filers—see the instructions Also, see page 1, item I)	7,574,170	7,792,530	7,792,530
	<b>17</b>	Accounts payable and accrued expenses . . . . .			
	<b>18</b>	Grants payable . . . . .			
	<b>19</b>	Deferred revenue . . . . .			
	<b>20</b>	Loans from officers, directors, trustees, and other disqualified persons			
	<b>21</b>	Mortgages and other notes payable (attach schedule) . . . . .			
	<b>22</b>	Other liabilities (describe ▶ _____)	5,870		
	<b>23</b>	<b>Total liabilities</b> (add lines 17 through 22) . . . . .	5,870	0	
<b>Net Assets or Fund Balances</b>		<b>Foundations that follow SFAS 117, check here</b> ▶ <input checked="" type="checkbox"/> <b>and complete lines 24 through 26 and lines 30 and 31.</b>			
	<b>24</b>	Unrestricted . . . . .	7,568,300	7,792,530	
	<b>25</b>	Temporarily restricted . . . . .			
	<b>26</b>	Permanently restricted . . . . .			
		<b>Foundations that do not follow SFAS 117, check here</b> ▶ <input type="checkbox"/> <b>and complete lines 27 through 31.</b>			
	<b>27</b>	Capital stock, trust principal, or current funds . . . . .			
	<b>28</b>	Paid-in or capital surplus, or land, bldg, and equipment fund			
	<b>29</b>	Retained earnings, accumulated income, endowment, or other funds			
	<b>30</b>	<b>Total net assets or fund balances</b> (see instructions) . . . . .	7,568,300	7,792,530	
	<b>31</b>	<b>Total liabilities and net assets/fund balances</b> (see instructions) . . . . .	7,574,170	7,792,530	

**Part III Analysis of Changes in Net Assets or Fund Balances**

<b>1</b>	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) . . . . .	<b>1</b>	7,568,300
<b>2</b>	Enter amount from Part I, line 27a . . . . .	<b>2</b>	371,702
<b>3</b>	Other increases not included in line 2 (itemize) ▶ _____	<b>3</b>	
<b>4</b>	Add lines 1, 2, and 3 . . . . .	<b>4</b>	7,940,002
<b>5</b>	Decreases not included in line 2 (itemize) ▶ _____	<b>5</b>	147,472
<b>6</b>	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 . . . . .	<b>6</b>	7,792,530

**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 )
<b>1 a</b>	PUBLICLY TRADED SECURITIES	P		
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b>				

(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)
<b>a</b> 900,148		996,910	-96,762
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h)) (l)
(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	
<b>a</b>			-96,762
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

<b>2</b>	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	<b>2</b>	29,336
<b>3</b>	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 . . . . .		<b>3</b>	

**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	1,271,307	5,740,318	0 221470
2013	1,265,180	5,369,692	0 235615
2012	71,242	4,577,427	0 015564
2011	1,330,378	4,308,574	0 308775
2010	1,512,763	4,032,168	0 375174

<b>2</b>	Total of line 1, column (d). . . . .	<b>2</b>	1 156598
<b>3</b>	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	<b>3</b>	0 231320
<b>4</b>	Enter the net value of noncharitable-use assets for 2015 from Part X, line 5. . . . .	<b>4</b>	5,901,258
<b>5</b>	Multiply line 4 by line 3. . . . .	<b>5</b>	1,365,079
<b>6</b>	Enter 1% of net investment income (1% of Part I, line 27b). . . . .	<b>6</b>	2,330
<b>7</b>	Add lines 5 and 6. . . . .	<b>7</b>	1,367,409
<b>8</b>	Enter qualifying distributions from Part XII, line 4. . . . .	<b>8</b>	1,270,344

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 <input type="checkbox"/> 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 <input type="checkbox"/> and enter 1% of Part I, line 27b . . . . .	1	4,660
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	
3	Add lines 1 and 2. . . . .	3	4,660
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5	<b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0- . . . . .	5	4,660
6	Credits/Payments		
a	2015 estimated tax payments and 2014 overpayment credited to 2015	6a	9,800
b	Exempt foreign organizations—tax withheld at source . . . . .	6b	
c	Tax paid with application for extension of time to file (Form 8868). . . . .	6c	
d	Backup withholding erroneously withheld . . . . .	6d	
7	Total credits and payments. Add lines 6a through 6d. . . . .	7	9,800
8	Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	11
9	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b> . . . . .	9	
10	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b> . . . . .	10	5,129
11	Enter the amount of line 10 to be <b>Credited to 2015 estimated tax</b> 5,129 <b>Refunded</b>	11	

Part VII-A Statements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? . . . . .		Yes	No
1a		1a		No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? . . . . . <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities</i>			No
1b		1b		No
c	Did the foundation file <b>Form 1120-POL</b> for this year? . . . . .	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation  \$ _____ (2) On foundation managers  \$ _____			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers  \$ _____			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? . . . . . <i>If "Yes," attach a detailed description of the activities</i>	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i> . . . . .	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year? . . . . .	4a		No
b	If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year? . . . . .	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? . . . . . <i>If "Yes," attach the statement required by General Instruction T</i>	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument? . . . . .	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i> . . . . .	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) MN _____			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation.</i>	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i> . . . . .	9		No
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i> . . . . .	10		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 ▶ WWW.ALWORTHSCHOLARSHIP.ORG	13	Yes	
14	The books are in care of ▶ PATTY SALO DOWNS Telephone no ▶ (218) 722-9366 Located at ▶ 402 ALWORTH BUILDING DULUTH MN ZIP+4 ▶ 55802			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here . . . . . ▶ <input type="checkbox"/> 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? <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? (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 ). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)? <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here. ▶ <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? . . . . .	1c		
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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? <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? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015 ). . . . .	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)**

<b>5a</b> During the year did the foundation pay or incur any amount to			
<b>(1)</b> Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
<b>(2)</b> Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
<b>(3)</b> Provide a grant to an individual for travel, study, or other similar purposes?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
<b>(4)</b> Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions).	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
<b>(5)</b> Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
<b>b</b> If any answer is "Yes" to 5a(1)–(5), did <b>any</b> 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)?	<input type="checkbox"/>	<b>5b</b>	No
Organizations relying on a current notice regarding disaster assistance check here. <span style="float: right;">▶</span>			
<b>c</b> 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?	<input type="checkbox"/> Yes <input type="checkbox"/> No		
<i>If "Yes," attach the statement required by Regulations section 53.4945–5(d)</i>			
<b>6a</b> Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
<b>b</b> Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	<input type="checkbox"/>	<b>6b</b>	No
<i>If "Yes" to 6b, file Form 8870</i>			
<b>7a</b> At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
<b>b</b> If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	<input type="checkbox"/>	<b>7b</b>	

**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
NONE				

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

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

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

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

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

**Part IX-A** Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
<b>1</b> SCHOLARSHIPS PROGRAM FOR STUDENTS WHO HAVE OUTSTANDING SCHOLASTIC ABILITY AND THE POTENTIAL FOR ACHEIVEMENT IN THE SCIENCES	1,150,500
<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> N/A	
<b>2</b>	
All other program-related investments. See instructions.	
<b>3</b>	

**Total.** Add lines 1 through 3 . . . . . ▶



**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>	6,456,474
<b>b</b>	Average of monthly cash balances. . . . .	<b>1b</b>	703,212
<b>c</b>	Fair market value of all other assets (see instructions). . . . .	<b>1c</b>	53,116
<b>d</b>	<b>Total</b> (add lines 1a, b, and c). . . . .	<b>1d</b>	7,212,802
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation). . . . .	<b>1e</b>	
<b>2</b>	Acquisition indebtedness applicable to line 1 assets. . . . .	<b>2</b>	
<b>3</b>	Subtract line 2 from line 1d. . . . .	<b>3</b>	7,212,802
<b>4</b>	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions). . . . .	<b>4</b>	1,311,544
<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>	5,901,258
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5. . . . .	<b>6</b>	295,063

**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>	295,063
<b>2a</b>	Tax on investment income for 2015 from Part VI, line 5. . . . .	<b>2a</b>	4,660
<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>	4,660
<b>3</b>	Distributable amount before adjustments Subtract line 2c from line 1. . . . .	<b>3</b>	290,403
<b>4</b>	Recoveries of amounts treated as qualifying distributions. . . . .	<b>4</b>	
<b>5</b>	Add lines 3 and 4. . . . .	<b>5</b>	290,403
<b>6</b>	Deduction from distributable amount (see instructions). . . . .	<b>6</b>	
<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>	290,403

**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>	1,270,344
<b>b</b>	Program-related investments—total from Part IX-B. . . . .	<b>1b</b>	
<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>	1,270,344
<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>	
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4. . . . .	<b>6</b>	1,270,344

**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
<b>1</b> Distributable amount for 2015 from Part XI, line 7				290,403
<b>2</b> Undistributed income, if any, as of the end of 2015				
<b>a</b> Enter amount for 2014 only. . . . .				
<b>b</b> Total for prior years    20____, 20____, 20____				
<b>3</b> Excess distributions carryover, if any, to 2015				
<b>a</b> From 2010. . . . .	1,316,472			
<b>b</b> From 2011. . . . .	1,119,977			
<b>c</b> From 2012. . . . .				
<b>d</b> From 2013. . . . .	1,000,009			
<b>e</b> From 2014. . . . .	994,058			
<b>f</b> <b>Total</b> of lines 3a through e. . . . .	4,430,516			
<b>4</b> Qualifying distributions for 2015 from Part XII, line 4 ► \$ _____ 1,270,344				
<b>a</b> Applied to 2014, but not more than line 2a				
<b>b</b> Applied to undistributed income of prior years (Election required—see instructions). . . . .				
<b>c</b> Treated as distributions out of corpus (Election required—see instructions). . . . .				
<b>d</b> Applied to 2015 distributable amount. . . . .				290,403
<b>e</b> Remaining amount distributed out of corpus	979,941			
<b>5</b> Excess distributions carryover applied to 2015 (If an amount appears in column (d), the same amount must be shown in column (a) )				
<b>6</b> <b>Enter the net total of each column as indicated below:</b>				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5	5,410,457			
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b . . . . .				
<b>c</b> 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. . . . .				
<b>d</b> Subtract line 6c from line 6b Taxable amount—see instructions . . . . .				
<b>e</b> Undistributed income for 2014 Subtract line 4a from line 2a Taxable amount—see instructions . . . . .				
<b>f</b> Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015 . . . . .				0
<b>7</b> 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). . . . .				
<b>8</b> Excess distributions carryover from 2010 not applied on line 5 or line 7 (see instructions). . .	1,316,472			
<b>9</b> <b>Excess distributions carryover to 2016.</b> Subtract lines 7 and 8 from line 6a . . . . .	4,093,985			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2011. . . .	1,119,977			
<b>b</b> Excess from 2012. . . .				
<b>c</b> Excess from 2013. . . .	1,000,009			
<b>d</b> Excess from 2014. . . .	994,058			
<b>e</b> Excess from 2015. . . .	979,941			

## Part XIV

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☐ 4942(j)(3) or ☐ 4942(j)(5)

Tax year	Prior 3 years			(e) Total
(a) 2015	(b) 2014	(c) 2013	(d) 2012	

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**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:**

Contributed more than 2% of the total contributions received by the foundation  
 (or have contributed more than \$5,000) (See section 507(d)(2) )

10% or more of the stock of a corporation (or an equally large portion of the  
which the foundation has a 10% or greater interest

**2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**

Contributions to preselected charitable organizations and does not accept  
makes gifts, grants, etc (see instructions) to individuals or organizations under

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

mitted and information and materials they should include

PLICATION FORM WHICH IS WIDELY DISTRIBUTED TO HIGH SCHOOL  
OF MINNESOTA. A MEMO TO COUNSELORS IS PROVIDED WHICH OUTLINES  
FIELDS OF STUDY, TRANSCRIPTS SHOWING GRADE POINT AVERAGE, SIZE OF  
AVAILABLE TEST SCORES, A RECOMMENDATION FROM THE SCHOOL, AND  
S A NEED FOR A GRANT

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#### 15 OF EACH CALENDAR YEAR FOR SUBMISSION OF APPLICATIONS

as by geographical areas, charitable fields, kinds of institutions, or other

NORTHERN MINNESOTA ATTENDING ACCREDITED COLLEGES AND  
E MAJORING IN ONE OF THE BASIC SCIENCES OF MEDICINE AND CAN SHOW  
STANCE

**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)					
<b>a</b> <i>Paid during the year</i> See Additional Data Table					
<b>Total . . . . .</b>		<b>▶ 3a</b>			1,150,500
<b>b</b> <i>Approved for future payment</i>					
<b>Total . . . . .</b>		<b>▶ 3b</b>			

Enter gross amounts unless otherwise indicated

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

[illegible]

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

**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. . . . .

(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. . . . .

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.

[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.

\* \* \* \* \*

2016-10-31

\* \* \* \* \*

Signature of officer or trustee

Date

Title

May the IRS discuss this return with the preparer shown below

(see instr )? ☒ Yes ☐ No

☒ Yes ☐ No**Paid  
Preparer  
Use  
Only**

Print/Type preparer's name MICHAEL A PEDERSON	Preparer's Signature	Date 2016-10-28	Check if self-employed <input type="checkbox"/>	PTIN P00454472
Firm's name <input type="checkbox"/> ESTERBROOKS SCOTT SIGNORELLI ETAL LTD			Firm's EIN <input type="checkbox"/> 41-1414667	
Firm's address <input type="checkbox"/> 302 W SUPERIOR ST STE200 DULUTH, MN 55802			Phone no <input type="checkbox"/> (218) 727-6846	

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
PATTY SALO DOWNS	EXECUTIVE DI 30 00	57,899	0	0
402 ALWORTH BUILDING DULUTH, MN 55802				
NICK ALWORTH	CO-TRUSTEE 1 00	0	0	0
402 ALWORTH BUILDING DULUTH, MN 55802				
PAT ALTRICHTER	PRESIDENT 1 00	600	0	0
402 ALWORTH BUILDING DULUTH, MN 55802				
LINDA NISKANEN	VICE PRESIDE 1 00	400	0	0
402 ALWORTH BUILDING DULUTH, MN 55802				
JERRY DODD	TREASURER 1 00	400	0	0
402 ALWORTH BUILDING DULUTH, MN 55802				
ERIC NORBERG	DIRECTOR 1 00	200	0	0
402 ALWORTH BUILDING DULUTH, MN 55802				
LONNIE SWARTZ	DIRECTOR 1 00	600	0	0
402 ALWORTH BUILDING DULUTH, MN 55802				
PAM THOMSEN	DIRECTOR 1 00	600	0	0
402 ALWORTH BUILDING DULUTH, MN 55802				
TERE IVANCA	DIRECTOR 1 00	600	0	0
402 ALWORTH BUILDING DULUTH, MN 55802				
TOM RENIER	DIRECTOR 1 00	600	0	0
402 ALWORTH BUILDING DULUTH, MN 55802				

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				
ABBY R JEWETT 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
ABIGAIL G BLAKE 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	2,500
ABIGAIL K FINK 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
ABIGAIL K HINRICHS 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
ADAM M DIRKS 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
ADDISON L KYTE 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
ALAN V MANIVANNAN 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
ALAYNA E ERNSTER 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
ALEXANDER B WOONER 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
ALEXANDER W SCHMIES 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
ALEXANDRA H CRUM 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
ALLISON R KOSOBUD 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
ALYSSA M ENVALL 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
AMANDA K HAGEMEYER 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
AMANDA M KURTZ 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
<b>Total . . . . .</b> ▶ <b>3a</b>				1,150,500



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				
AMY J GUSTAFSON 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
ANDREA N BAKER 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
ANDREW M MAHONEN 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
ANNA M YURRICK 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
ANNEKA J LITTLER 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	2,500
ANTHONY J TREICHEL 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
ARIANA K HUBER 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
ASHLEY A BOYD 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
ASHLEY M LARSON 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
AUSTIN G COSSALTER 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
BAILEY M DREWES 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	2,500
BENJAMIN C STUBBS 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
BENJAMIN D FULTZ 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
BONNIE G HOLMVIG 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	2,500
BRADLEY D KOVACOVICH 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
<b>Total</b> . . . . .  <b>3a</b>				1,150,500

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				
BRENDAN D PELKEY 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
BRENDAN W HERMERDING 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
BRENDEN M IRELAND 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
BRETT E STERK 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
BRIAN R RADTKE 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
BRIANNA P ZUNICH 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
BRIDGET C ERICKSON 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
CADE C BOTTEN 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
CALEB D VOGT 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	2,500
CARLY E HUDELSON 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	4,600
CARLY J RITCHIE 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
CARTER K BAGLEY 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
CASEY A STAGE 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	2,500
CASEY L PALMER 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
CASSANDRA F ISAACSON 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
<b>Total . . . . . ▶ 3a</b>				1,150,500

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> <i>Paid during the year</i>				
CHARLIE P RYAN 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
CHRISTIAN S COFFMAN 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
CHRISTOPHER D NEVALA - PLAGEMANN 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	4,600
CHRISTOPHER D ZIMMER 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
CLARE E LAWRENCE 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
CLARK J HICKMAN 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
CODY P ALPIN 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
COLE C GILLUM 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
COLE E HANSEN 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
COLE J MIGGINS 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
COLIN D RICHARDS 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
COLIN L COTTINGHAM 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
COLLEEN K TSCHIDA 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
CONNOR T GUNSBURY 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
CONOR R GESSELL 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
<b>Total</b> . . . . .			<b>3a</b>	1,150,500

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				
COURTNEY D BAUER 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
COURTNEY R WIRTANEN 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
DAKOTA A HALL 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
DANIEL J MCGUIRE 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
DANIEL P SCHNOBRICH 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
DANNY G O'NEIL 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
DAWN N SWARTZ 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
DELANEY R COY 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
DEVON A SHUSTARICH 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
DILLON R LUNDSTROM 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
DOMINIC J PAULING 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
DOREALYSS A JOHNSON 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
DREW C JOHNSON 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	2,500
DREW J PITT 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
DYLAN R THOMPSON 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
<b>Total</b> . . . . . ► <b>3a</b>				1,150,500

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				
EILEEN F O'BRIEN 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
ELISA C MULLER 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
ELISE R COURTEMANCHE 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
ELIZABETH M CABLE 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
ELLEN S CLUSIAU 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
EMILY A WARNER 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	7,500
ERIC S GOODEN 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
ERICA S SWENSON 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
ERIK B DREYER 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
ERIK T SAFSTROM 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
ERIN E ARNDT 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
ERIN M BRINE-DOYLE 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
EVERETT M HOMMES 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
GABRIELLA J HAIRE 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
GARRETT M SKRBICH 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
<b>Total . . . . .</b> ► <b>3a</b>				1,150,500


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> <i>Paid during the year</i>				
GARRETT R BUSCH 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
GEORGE G OLSON 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
HANNAH J KORRI 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	2,500
HANNAH K SORENSON 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
HANNAH L MARTY 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
HANNAH R ARNTSON 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
HENRY L CURTIS 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
IAN L SWEENEY SMITH 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
ISABEL G LAWRENCE 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
ISAIAH C OLSON 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
JACE A LESLIE 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
JACE E BRADEMAN 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
JACK A REEVES 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
JACOB M SAWYER 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
JACQUELINE T BRINE-DOYLE 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
<b>Total</b> . . . . . <b>3a</b>				1,150,500

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				
JEFFREY M KLOW 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
JENNA E NAMYST 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
JENNAH J CALVERLY 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
JEREMY A PAULBECK 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
JESSICA K LOUCKS 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	2,500
JOEL T GUSTAFSON 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
JOHN A JENKINS 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
JOHN A MCKEOWN 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
JONAH P ROUX 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
JORDAN G PERATALO 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
JORDAN J KLEIST 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
JORDAN M WOLF 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
JOSH M PREBECK 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	4,600
JOSHUA L DOWELL 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
JOSHUA N MUICH 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
<b>Total</b> . . . . . ► <b>3a</b>				1,150,500

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				
JOSHUA R WARREN 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
JOSHUA W WIDMAN 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
JUSTIN P BRENDON 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
JUSTINE N STOLTZ 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
KARI E SMERUD 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
KARIANNA J DUESLER 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
KARL J WITTE 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
KASSHIA M MOSTAD 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	2,500
KATE L SHELERUD 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
KATELYN H MYHRE 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	2,500
KATHERINE E BOUDREAU 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
KATHERINE L CHMIELEWSKI 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
KATHERINE M BOETTCHER 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
KATHRYN A GRAY 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
KATHRYN B MONTGOMERY 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
<b>Total</b> . . . . .  <b>3a</b>				1,150,500



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> <i>Paid during the year</i>				
KATLYN M PERSCH 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
KATRINA R HAGEMEYER 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
KAYLA M HEWITT 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
KAYLA T SNELL 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
KEKE J SIRJORD 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
KELLY B SUSA 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
KELSEY T BINGGELI 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
KENDRA A PALLIN 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
KENNEDY M NISKA 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
KEVIN D KILBRIDE 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
KIMBERLY R RICE 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
KOLE P SPENCER 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
KRISTIN L SALMONSON 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
KYLIE E ZACHARIAS 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	2,500
KYLIE M ST PETER 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	7,500
<b>Total</b> . . . . .  <b>3a</b>				1,150,500


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				
LAUREN E MAKEY 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
LAUREN O ROSS 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
LINNEA M NELSON 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
LUKE A UNGER 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
LUKE D JACOBSEN 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
LUKE R HEINE 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	2,500
MACKENZIE L CARLSON 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	2,500
MADELINE S BREMEL 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
MARCUS M COMSTOCK 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
MARIA L WEST 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
MARIAH N SIDDIQUI 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
MARISSA R MENZEL 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
MARK M ANDERSON 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	2,500
MATHEW I JONES 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
MATTHEW A PESKE 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
<b>Total</b> . . . . . ► <b>3a</b>				1,150,500


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				
MATTHEW J O'CONNOR 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
MATTHEW J RANDOLPH 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
MATTHEW L MUHICH 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
MATTHEW T SODERBERG 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
MAYA T GRANTIER 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
MCKENZIE R MAIDL 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
MEG E FOSTER 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
MEGAN E MALECHA 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
MEGAN E WIENS 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
MELANIE E STODDARD 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
MICAH T VAN ZEE 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
MICAYLA F LESSARD 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
MICHAEL C LAROQUE 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
MICHAEL V CHMIELEWSKI 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
MICHELLE M BENSON 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
<b>Total . . . . .</b> ► <b>3a</b>				1,150,500

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				
MITCHELL L FONTAINE 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
MORGAN A TINQUIST 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
MYA L VAN NURDEN 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
NATALIE F COOK 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
NATHAN D EMERSON 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
NELSON D ISAACSON 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
NICHOLAS J KOENIG 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
NICHOLAS M ENGEN 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
NICHOLAS S GIULIANI 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	2,500
NOAH R SQUIRES 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
OWEN D CRUIKSHANK 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
PATRICK JJARVI 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
PAUL S BALDWIN 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
PETER A WELLS 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
RACHEL A BERG 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
<b>Total</b> . . . . .  <b>3a</b>				1,150,500

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> <i>Paid during the year</i>				
RACHEL A CAMERON 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	4,600
RACHEL I NORWOOD 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
RACHEL J SMILANICH 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
RACHEL L ORTEGA 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
REBECCA A REBROVICH 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
REBECCA J YEH 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
REILLY W HALLSTROM 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
RILEY A O'BRIEN 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
ROBERT A TURNER 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
RYAN C BELL 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	2,500
RYAN J KILBRIDE 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
RYAN M JOHNSON 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
RYDER S HUNSTAD 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
SAMANTHA L HERVEY 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	2,500
SAMUEL B BELDEN 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
<b>Total</b> . . . . .  <b>3a</b>				1,150,500

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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				
SAMUEL J MULLER 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
SAMUEL J RODENBERG 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
SAMUEL J RUOHONIEMI 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
SARA R MYHRE 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	2,500
SARA T WHITEMAN 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
SARAH A TODD 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
SARAH M RAJALA 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
SARAH P YEH 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
SHANE R FENSKE 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
SHELBY N ANDRIST 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
SIERRA MOEN 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
SKYELER D ELHARD 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
SPENCER R GOBLE 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	2,500
STEPHANIE K MADZEY 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
STEPHANIE M HART 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
<b>Total</b> . . . . . ► <b>3a</b>				1,150,500

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				
STEPHANIE V ALDRIN 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	4,600
TANNER D FUGLESTAD 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
TARA C SALEY 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
TAYLOR M SAWYER 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
TESSA J WIENS 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
TESSA M RICHARDS 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
THOMAS Z PAULL 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
TIMOTHY P NELSON 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
TONI R GOHMAN 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
TRAVIS C SLETTVEDT 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
TRISTAN L LITKE 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
TYLER D GRUNENWALD 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
WILLIAM R DEER 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	2,500
ZACHARY A TROTTIER 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
ZACHARY J TURNER 402 ALWORTH BUILDING DULUTH, MN 55802	NONE	I	EDUCATIONAL SCHOLARSHIP	5,000
<b>Total</b> . . . . . <b>3a</b>				1,150,500

**TY 2015 Accounting Fees Schedule**

**Name:** MARSHALL H AND NELLIE ALWORTH  
MEMORIAL FUND

**EIN:** 41-0797340

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	7,275	7,275		



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

**TY 2015 Depreciation Schedule**

**Name:** MARSHALL H AND NELLIE ALWORTH  
MEMORIAL FUND

**EIN:** 41-0797340

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
DEPRECIATION						601			

**TY 2015 Investments - Land Schedule**

**Name:** MARSHALL H AND NELLIE ALWORTH  
MEMORIAL FUND

**EIN:** 41-0797340

Category/ Item	Cost/Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
MINERAL PROPERTIES	534,827	484,303	50,524	50,524

**TY 2015 Investments - Other Schedule**

**Name:** MARSHALL H AND NELLIE ALWORTH  
MEMORIAL FUND

**EIN:** 41-0797340

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
DB INVESTMENT ADVISORY	FMV	6,578,325	6,578,325

## TY 2015 Land, Etc. Schedule

**Name:** MARSHALL H AND NELLIE ALWORTH  
MEMORIAL FUND

**EIN:** 41-0797340

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
FURNITURE AND FIXTURES	23,007	20,415	2,592	2,592

## TY 2015 Legal Fees Schedule

**Name:** MARSHALL H AND NELLIE ALWORTH  
MEMORIAL FUND

**EIN:** 41-0797340

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL	2,108			

**TY 2015 Other Assets Schedule**

**Name:** MARSHALL H AND NELLIE ALWORTH  
MEMORIAL FUND

**EIN:** 41-0797340

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
ROYALTIES RECEIVABLE	2,125	64,462	64,462
PREPAID EXCISE TAX		5,148	5,148

## TY 2015 Other Decreases Schedule

**Name:** MARSHALL H AND NELLIE ALWORTH  
MEMORIAL FUND

**EIN:** 41-0797340

Description	Amount
MARKET VALUE CHANGE	147,472

**TY 2015 Other Expenses Schedule**

**Name:** MARSHALL H AND NELLIE ALWORTH  
MEMORIAL FUND

**EIN:** 41-0797340

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXPENSES				
MISCELLANEOUS	5,725			5,725
TELEPHONE	718			718
COMPUTER CONSULTING	5,765	5,765		
INSURANCE	3,059			3,059
DUES & SUBSCRIPTIONS	3,300	495		2,805
MARKETING	3,195			3,195
COUNSELOR RECEPTION	3,635			3,635



**TY 2015 Other Income Schedule**

**Name:** MARSHALL H AND NELLIE ALWORTH  
MEMORIAL FUND

**EIN:** 41-0797340

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
ROYALTIES	178,102	178,102	

**TY 2015 Other Liabilities Schedule**

**Name:** MARSHALL H AND NELLIE ALWORTH  
MEMORIAL FUND

**EIN:** 41-0797340

Description	Beginning of Year - Book Value	End of Year - Book Value
EXCISE TAX PAYABLE	5,870	

**TY 2015 Other Professional Fees Schedule**

**Name:** MARSHALL H AND NELLIE ALWORTH  
MEMORIAL FUND

**EIN:** 41-0797340

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT FEES	33,902	33,902		
MINE INSPECTION	7,080	7,080		

**TY 2015 Taxes Schedule**

**Name:** MARSHALL H AND NELLIE ALWORTH  
MEMORIAL FUND

**EIN:** 41-0797340

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
REAL ESTATE TAXES	1,275	1,275		
PAYROLL TAXES	6,820	1,023		5,797
EXCISE TAX	4,653			

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](http://www.irs.gov/form990).

OMB No 1545-0047

2015

Name of the organization	Employer identification number
MARSHALL H AND NELLIE ALWORTH MEMORIAL FUND	41-0797340

Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	<input type="checkbox"/> 501(c)( ) (enter number) organization
	<input type="checkbox"/> 4947(a)(1) nonexempt charitable trust <b>not</b> treated as a private foundation
	<input type="checkbox"/> 527 political organization
Form 990-PF	<input checked="" type="checkbox"/> 501(c)(3) exempt private foundation
	<input type="checkbox"/> 4947(a)(1) nonexempt charitable trust treated as a private foundation
	<input type="checkbox"/> 501(c)(3) taxable private foundation

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 33<sup>1</sup>/<sub>3</sub>% 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).

<b>Name of organization</b> MARSHALL H AND NELLIE ALWORTH MEMORIAL FUND	<b>Employer identification number</b> 41-0797340
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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	MARSHALL WALWORTH MEMORIAL TRUST	\$ 1,415,828	Person <input checked="" type="checkbox"/>
	280 PARK AVENUE 7TH FLOOR		Payroll <input type="checkbox"/>
	NEW YORK, NY 100171270		Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/>
			Payroll <input type="checkbox"/>
			Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/>
			Payroll <input type="checkbox"/>
			Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/>
			Payroll <input type="checkbox"/>
			Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/>
			Payroll <input type="checkbox"/>
			Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/>
			Payroll <input type="checkbox"/>
			Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/>
			Payroll <input type="checkbox"/>
			Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )

## Part II

(see instructions) Use duplicate copies of Part II if additional space is needed

Schedule B (Form 990, 990-EZ, or 990-PF) (2015)

Name of organization MARSHALL H AND NELLIE ALWORTH MEMORIAL FUND	Employer identification number 41-0797340
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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	
_____ _____ --		_____ _____ _____	