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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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Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf

OMB No 1545-0052

2015

Open to Public Inspection

For calendar year 2015 or tax year beginning

10/01, 2015, and ending

09/30, 2016

Name of foundation

SIMONSON FAMILY CHARITABLE FOUNDATION

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

P.O. BOX 419248

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

KANSAS CITY, MO 64141-6248

A Employer identification number

37-6560385

B Telephone number (see instructions)

816-234-2000

C If exemption application is pending, check here ☐D 1 Foreign organizations, check here ☐2 Foreign organizations meeting the 85% test, check here and attach computation ☐E If private foundation status was terminated under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

G Check all that apply.

☒ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name change

H Check type of organization:

☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 2,005,461.

J Accounting method: ☒ Cash ☐ Accrual
☐ Other (specify) _____
(Part I, column (d) must be on cash basis)**Part I Analysis of Revenue and Expenses** (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received (attach schedule)				
2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B.				
3 Interest on savings and temporary cash investments				
4 Dividends and interest from securities	42,269.	42,269.		
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	24,134.			
b Gross sales price for all assets on line 6a 333,049.				
7 Capital gain net income (from Part IV, line 2)		24,134.		
8 Net short-term capital gain				
9 Income modifications				
10a Gross sales less returns and allowances				
b Less Cost of goods sold				
c Gross profit or (loss) (attach schedule)				
11 Other income (attach schedule)				
12 Total. Add lines 1 through 11	66,403.	66,403.		
13 Compensation of officers, directors, trustees, etc.	18,050.	13,990.		4,060.
14 Other employee salaries and wages		NONE	NONE	
15 Pension plans, employee benefits		NONE	NONE	
16a Legal fees (attach schedule)				
b Accounting fees (attach schedule)				
c Other professional fees (attach schedule)				
17 Interest				
18 Taxes (attach schedule) (see instructions)				
19 Depreciation (attach schedule) and depletion				
20 Occupancy				
21 Travel, conferences, and meetings		NONE	NONE	
22 Printing and publications		NONE	NONE	
23 Other expenses (attach schedule)				
24 Total operating and administrative expenses. Add lines 13 through 23.	18,050.	13,990.	NONE	4,060.
25 Contributions, gifts, grants paid	75,000.			75,000.
26 Total expenses and disbursements. Add lines 24 and 25	93,050.	13,990.	NONE	79,060.
27 Subtract line 26 from line 12				
a Excess of revenue over expenses and disbursements	-26,647.			
b Net investment income (if negative, enter -0-)		52,413.		
c Adjusted net income (if negative, enter -0-)				

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing			
	2	Savings and temporary cash investments	18,060.	23,645.	23,645.
	3	Accounts receivable ▶			
		Less allowance for doubtful accounts ▶			
	4	Pledges receivable ▶			
		Less allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶			
		Less allowance for doubtful accounts ▶	NONE		
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments - U S and state government obligations (attach schedule)			
	b	Investments - corporate stock (attach schedule) Stmt A.	1,404,469.	1,257,361.	1,328,965.
	c	Investments - corporate bonds (attach schedule) Stmt A.	419,650.	555,787.	562,031.
	Liabilities	11	Investments - land, buildings, and equipment basis ▶		
		Less accumulated depreciation ▶ (attach schedule)			
12		Investments - mortgage loans			
13		Investments - other (attach schedule)			
14		Land, buildings, and equipment basis ▶			
		Less accumulated depreciation ▶ (attach schedule)			
15		Other assets (describe ▶ ALTERNATIVE INVESTMENTS Stmt A)	116,566.	95,304.	90,820.
16		Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	1,958,745.	1,932,097.	2,005,461.
17		Accounts payable and accrued expenses			
18		Grants payable			
Net Assets or Fund Balances	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
23	Total liabilities (add lines 17 through 22)		NONE		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>				
	and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input checked="" type="checkbox"/>				
	27	Capital stock, trust principal, or current funds	1,958,745.	1,932,097.	
	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)	1,958,745.	1,932,097.		
31	Total liabilities and net assets/fund balances (see instructions)	1,958,745.	1,932,097.		

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,958,745.
2	Enter amount from Part I, line 27a	2	-26,647.
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	1,932,098.
5	Decreases not included in line 2 (itemize) ▶ ROUNDING	5	1.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,932,097.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs. MLC Co.)			(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a PUBLICLY TRADED SECURITIES					
b					
c					
d					
e					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)		
a 333,049.		308,915.	24,134.		
b					
c					
d					
e					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69					
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))		
a			24,134.		
b					
c					
d					
e					
2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }			2	24,134.	
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8			3		

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2014	62,097.	2,080,504.	0.029847
2013	13,464.	1,961,915.	0.006863
2012			
2011			
2010			
2 Total of line 1, column (d)			0.036710
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			0.018355
4 Enter the net value of noncharitable-use assets for 2015 from Part X, line 5			1,960,533.
5 Multiply line 4 by line 3			35,986.
6 Enter 1% of net investment income (1% of Part I, line 27b)			524.
7 Add lines 5 and 6			36,510.
8 Enter qualifying distributions from Part XII, line 4			79,060.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here <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 checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	524.
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	524.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	NONE
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	524.
6	Credits/Payments		
a	2015 estimated tax payments and 2014 overpayment credited to 2015	6a	1,399.
b	Exempt foreign organizations - tax withheld at source	6b	NONE
c	Tax paid with application for extension of time to file (Form 8868)	6c	NONE
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	1,399.
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	875.
11	Enter the amount of line 10 to be Credited to 2016 estimated tax ▶ 875. Refunded ▶	11	

Part VII-A Statements Regarding Activities

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

Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	X	
Website address ▶ N/A		
14 The books are in care of ▶ SEE STATEMENT 1 Telephone no. ▶		
Located at ▶ ZIP+4 ▶		
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?		X
See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ▶		

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

	Yes	No
1a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<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 checked="" type="checkbox"/> Yes	<input 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)?		X
Organizations relying on a current notice regarding disaster assistance check here ▶		
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2015?		X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
If "Yes," list the years ▶		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions)		X
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<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.)		
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2015?		X

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

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

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

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

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

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

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

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

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

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

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

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

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ **6b** ☒

If "Yes" to 6b, file Form 8870

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

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

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (if not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
COMMERCE BANK, TRUSTEE PO BOX 419248, KANSAS CITY, MO 64141-6248	2	18,050	-0-	-0-

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

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

Total number of other employees paid over \$50,000 ☐ **NONE**

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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		NONE
Total number of others receiving over \$50,000 for professional services		NONE

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 NONE	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2

	Amount
1 NONE	
2	
All other program-related investments See instructions	
3 NONE	
Total. Add lines 1 through 3	

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	1,903,746.
b	Average of monthly cash balances	1b	86,643.
c	Fair market value of all other assets (see instructions).	1c	NONE
d	Total (add lines 1a, b, and c)	1d	1,990,389.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	NONE
3	Subtract line 2 from line 1d	3	1,990,389.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	29,856.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,960,533.
6	Minimum investment return. Enter 5% of line 5	6	98,027.

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	98,027.
2a	Tax on investment income for 2015 from Part VI, line 5 2a		524.
b	Income tax for 2015. (This does not include the tax from Part VI.) 2b		
c	Add lines 2a and 2b	2c	524.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	97,503.
4	Recoveries of amounts treated as qualifying distributions	4	NONE
5	Add lines 3 and 4	5	97,503.
6	Deduction from distributable amount (see instructions).	6	NONE
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	97,503.

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	79,060.
b	Program-related investments - total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	NONE
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	NONE
b	Cash distribution test (attach the required schedule)	3b	NONE
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	79,060.
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	524.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	78,536.

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				97,503.
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only.			65,638.	
b Total for prior years 20 <u>13</u> , 20 <u> </u> , 20 <u> </u>		NONE		
3 Excess distributions carryover, if any, to 2015				
a From 2010	NONE			
b From 2011	NONE			
c From 2012	NONE			
d From 2013	NONE			
e From 2014	NONE			
f Total of lines 3a through e	NONE			
4 Qualifying distributions for 2015 from Part XII, line 4 ▶ \$ <u>79,060.</u>				
a Applied to 2014, but not more than line 2a			65,638.	
b Applied to undistributed income of prior years (Election required - see instructions)		NONE		
c Treated as distributions out of corpus (Election required - see instructions)	NONE			
d Applied to 2015 distributable amount				13,422.
e Remaining amount distributed out of corpus	NONE			
5 Excess distributions carryover applied to 2015 . (If an amount appears in column (d), the same amount must be shown in column (a))	NONE			NONE
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	NONE			
b Prior years' undistributed income. Subtract line 4b from line 2b.		NONE		
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		NONE		
d Subtract line 6c from line 6b. Taxable amount - see instructions		NONE		
e Undistributed income for 2014. Subtract line 4a from line 2a. Taxable amount - see instructions				
f Undistributed income for 2015. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2016				84,081.
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)	NONE			
8 Excess distributions carryover from 2010 not applied on line 5 or line 7 (see instructions)	NONE			
9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a	NONE			
10 Analysis of line 9				
a Excess from 2011	NONE			
b Excess from 2012	NONE			
c Excess from 2013	NONE			
d Excess from 2014	NONE			
e Excess from 2015	NONE			

Part XV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year SEE STATEMENT 7				75,000.
Total			▶ 3a	75,000.
b Approved for future payment				
Total			▶ 3b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount		
1 Program service revenue:						
a _____						
b _____						
c _____						
d _____						
e _____						
f _____						
g Fees and contracts from government agencies						
2 Membership dues and assessments						
3 Interest on savings and temporary cash investments						
4 Dividends and interest from securities			14	42,269.		
5 Net rental income or (loss) from real estate:						
a Debt-financed property						
b Not debt-financed property						
6 Net rental income or (loss) from personal property						
7 Other investment income						
8 Gain or (loss) from sales of assets other than inventory			18	24,134.		
9 Net income or (loss) from special events						
10 Gross profit or (loss) from sales of inventory						
11 Other revenue a _____						
b _____						
c _____						
d _____						
e _____						
12 Subtotal. Add columns (b), (d), and (e)				66,403.		
13 Total. Add line 12, columns (b), (d), and (e)				66,403.		

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

[illegible]

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

		Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		
a	Transfers from the reporting foundation to a noncharitable exempt organization of:		
	(1) Cash	1a(1)	X
	(2) Other assets	1a(2)	X
b	Other transactions:		
	(1) Sales of assets to a noncharitable exempt organization	1b(1)	X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)	X
	(3) Rental of facilities, equipment, or other assets	1b(3)	X
	(4) Reimbursement arrangements	1b(4)	X
	(5) Loans or loan guarantees	1b(5)	X
	(6) Performance of services or membership or fundraising solicitations	1b(6)	X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c	X
d	If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.		


[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
See Statement B		

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

Sign Here		1/16/2017	TRUSTEE	<div>May the IRS discuss this return with the preparer shown below (see instructions)? <input type="checkbox"/> Yes <input type="checkbox"/> No</div>
	Signature of officer or trustee	Date		
	THE COMMERCE TRUST COMPANY, Trustee			

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

Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
	Firm's name ▶			Firm's EIN ▶	
	Firm's address ▶			Phone no	

FORM 990PF, PART VII-A, LINE 14 - BOOKS ARE IN THE CARE OF
=====

NAME: MARCIA UBBEN
THE COMMERCE TRUST COMPANY
ADDRESS: PO BOX 419248
KANSAS CITY, MO 64141

TELEPHONE NUMBER: (816) 234-2346

RECIPIENT NAME:
UPPER VALLEY HAVEN
ADDRESS:
713 HARTFORD AVENUE
White River Junction, VT 05001
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
USED AT THE DISCRETION OF THE BOARD OF DIRECTORS
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 2,000.

RECIPIENT NAME:
LEGAL AID OF WESTERN MISSOURI
ADDRESS:
1125 GRAND BOULEVARD, SUITE 1900
KANSAS CITY, MO 64106
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
USED AT THE DISCRETION OF THE BOARD OF DIRECTORS
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 6,000.

RECIPIENT NAME:
ASSISTANCE LEAGUE OF KANSAS CITY
ADDRESS:
6101 N CHESTNUT AVENUE
GLADSTONE, MO 64119
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
USED AT THE DISCRETION OF THE BOARD OF DIRECTORS
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 6,000.

RECIPIENT NAME:
KANSAS CITY RESCUE MISSION
ADDRESS:
1520 CHERRY STREET
KANSAS CITY, MO 64108
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
USED AT THE DISCRETION OF THE BOARD OF DIRECTORS
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 6,000.

RECIPIENT NAME:
KANSAS CITY PASSAGES YOUTH CENTER
ADDRESS:
620 E ARMOUR BLVD
KANSAS CITY, MO 64109
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
USED AT THE DISCRETION OF THE BOARD OF DIRECTORS
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 6,000.

RECIPIENT NAME:
METROPOLITAN ORGANIZATION TO COUNTER
SEXUAL ASSAULT
ADDRESS:
3100 BROADWAY, SUITE 400
KANSAS CITY, MO 64111-2591
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
USED AT THE DISCRETION OF THE BOARD OF DIRECTORS
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 6,000.

SIMONSON FAMILY CHARITABLE FOUNDATION 37-6560385
FORM 990PF, PART XV, LINE 3a - CONTRIBUTIONS, GIFTS, GRANTS PAID
=====

RECIPIENT NAME:
OPERATION BREAKTHROUGH
ADDRESS:
3039 TROOST AVENUE
KANSAS CITY, MO 64109
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
USED AT THE DISCRETION OF THE BOARD OF DIRECTORS
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 6,000.

RECIPIENT NAME:
NEWHOUSE
ADDRESS:
PO BOX 240019
KANSAS CITY, MO 64124-0019
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
USED AT THE DISCRETION OF THE BOARD OF DIRECTORS
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 6,000.

RECIPIENT NAME:
PRINCIPLE FOUNDATION
ADDRESS:
2405 GRAND BOULEVARD #1040
KANSAS CITY, MO 64108
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
USED AT THE DISCRETION OF THE BOARD OF DIRECTORS
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 6,000.

RECIPIENT NAME:
MOTHER JONES
ADDRESS:
PO BOX 3029
LANGHORNE, PA 19047
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
USED AT THE DISCRETION OF THE BOARD OF DIRECTORS
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 1,000.

RECIPIENT NAME:
AMERICAN JAZZ MUSEUM
ADDRESS:
1616 E 18TH STREET
KANSAS CITY, MO 64108
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
USED AT THE DISCRETION OF THE BOARD OF DIRECTORS
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 1,000.

RECIPIENT NAME:
NEGRO LEAGUES BASEBALL MUSEUM
ADDRESS:
1616 E 18TH STREET
KANSAS CITY, MO 64108
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
USED AT THE DISCRETION OF THE BOARD OF DIRECTORS
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 1,000.

RECIPIENT NAME:
N+1 FOUNDATION
ADDRESS:
68 JAY STREET, #405
BROOKLYN, NY 11201
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
USED AT THE DISCRETION OF THE BOARD OF DIRECTORS
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 1,000.

RECIPIENT NAME:
GUADALUPE CENTER
ADDRESS:
1015 AVE CESAR CHAVEZ
KANSAS CITY, MO 64108
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
USED AT THE DISCRETION OF THE BOARD OF DIRECTORS
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 6,000.

RECIPIENT NAME:
THE HUMANE SOCIETY OF GREATER
KANSAS CITY FBO FANCY'S FUND
ADDRESS:
5445 PARALLEL PARKWAY
KANSAS CITY, KS 66104
RELATIONSHIP:
NONE
PURPOSE OF GRANT:
USED AT THE DISCRETION OF THE BOARD OF DIRECTORS
FOUNDATION STATUS OF RECIPIENT:
PC
AMOUNT OF GRANT PAID 2,500.

SIMONSON FAMILY CHARITABLE FOUNDATION

37-6560385

FORM 990PF, PART XV, LINE 3a - CONTRIBUTIONS, GIFTS, GRANTS PAID

RECIPIENT NAME:

WAYSIDE WAIFS

ADDRESS:

3901 MARTHA TRUMAN ROAD

KANSAS CITY, MO 64137

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

USED AT THE DISCRETION OF THE BOARD OF DIRECTORS

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 7,500.

RECIPIENT NAME:

ROCKY MOUNTAIN CONSERVANCY

ADDRESS:

PO BOX 3100

ESTES PARK, CO 80517

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

CASCADE COTTAGE CAMPAIGN

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 5,000.

TOTAL GRANTS PAID:

75,000.

=====

STATEMENT 7,

Simonson Family Charitable Fndn
October 1, 2015 - September 30, 2016

EIN 37-6560385

Account Number 46-0059-01-7

List of Assets

<i>Description</i>	<i>Shares</i>	<i>Cost/ Per Unit</i>	<i>Market Value/ Per Unit</i>	<i>Percent Of Assets</i>	<i>Projected Annual Income</i>	<i>Current Yield</i>
<i>Cash and Cash Equivalents</i>						
Financial Square Tr Government Fd	23,645 09	23,645 09	23,645 09	1 18%	15 00	0 07%
Admin Cl Fund 466		1 00	1 00			
Income Cash		18,913 92	18,913 92	0 94%	0 00	0 00%
Principal Cash		-18,913 92	-18,913 92	-0 94%	0 00	0 00%
Total Cash and Cash Equivalents		\$ 23,645.09	\$ 23,645.09	1.18%	\$ 15.00	0.07%
<i>Equity Investments</i>						
Domestic Equities						
Common Stocks						
Cerner Corp	225	13,499 41 60 00	13,893 75 61 75	0 69%	0 00	0 00%
Facebook Inc-A	210	19,023 44 90 59	26,936 70 128 27	1 34%	0 00	0 00%
V F Corp	800	280 01 0 35	44,840 00 56 05	2 24%	1,184 00	2 64%
Total Common Stocks		\$ 32,802.86	\$ 85,670.45	4.27%	\$ 1,184.00	1.38%
Exchange Traded Funds						
iShares Russell Midcap Growth ETF	743	60,949 18 82 03	72,345 91 97 37	3 61%	764 00	1 06%
iShares Russell Midcap Value ETF	1,658	106,693 96 64 35	127,284 66 76 77	6 35%	2,679 00	2 10%
iShares Russell 1000 Value ETF	1,168	107,651 76 92 17	123,364 16 105 62	6 15%	2,819 00	2 29%
Total Exchange Traded Funds		\$ 275,294.90	\$ 322,994.73	16.11%	\$ 6,262.00	1.94%

Statement A

Simonson Family Charitable Fndn
October 1, 2015 - September 30, 2016

EIN 37-6560385

Account Number 46-0059-01-7

List of Assets

<i>Description</i>	<i>Shares</i>	<i>Cost/ Per Unit</i>	<i>Market Value/ Per Unit</i>	<i>Percent Of Assets</i>	<i>Projected Annual Income</i>	<i>Current Yield</i>
Mutual Funds						
Allianzgi Nfj Dividend Value Fund-Institutional	8,984 155	141,320 76 15 73	144,644 90 16 10	7 21%	3,863 00	2 67%
Clearbridge Small Cap Growth Fund Class I	1,142 666	32,691 68 28 61	33,514 39 29 33	1 67%	0 00	0 00%
DFA U S Small Cap Value Portfolio	939	32,085 63 34 17	31,747 59 33 81	1 58%	307 00	0 97%
Natixis Loomis Sayles Value Fund Y	3,840 959	106,586 60 27 75	79,930 36 20 81	3 99%	1,459 00	1 83%
T Rowe Price New Horizons Fund-I	484 025	21,790 30 45 02	22,366 80 46 21	1 12%	0 00	0 00%
Vanguard Morgan Growth Fund-Ad	2,633 345	203,873 60 77 42	210,140 93 79 80	10 48%	1,727 00	0 82%
Wells Fargo Premier Large Company Growth Fund-Class Inst	7,661 138	109,018 00 14 23	115,223 52 15 04	5 75%	0 00	0 00%
Total Mutual Funds		\$ 647,366.57	\$ 637,568.49	31.79%	\$ 7,356.00	1.15%
Total Domestic Equities		\$ 955,464.33	\$ 1,046,233.67	52.17%	\$ 14,802.00	1.42%
International Equities						
Exchange Traded Funds						
Vanguard Ftse All World Ex-US Small Cap ETF	480	48,858 86 101 79	47,773 06 99 53	2 38%	1,219 00	2 55%
Total Exchange Traded Funds		\$ 48,858.86	\$ 47,773.06	2.38%	\$ 1,219.00	2.55%
International Equity Mutual Funds						
Invesco Developing Markets Fund-R6	1,521 89	48,937 78 32 16	46,493 74 30 55	2 32%	587 00	1 26%

Statement A

Simonson Family Charitable Fndn

October 1, 2015 - September 30, 2016

EIN 37-6560385

Account Number 46-0059-01-7

List of Assets

<i>Description</i>	<i>Shares</i>	<i>Cost/ Per Unit</i>	<i>Market Value/ Per Unit</i>	<i>Percent Of Assets</i>	<i>Projected Annual Income</i>	<i>Current Yield</i>
Lazard Developing Markets Equity Portfolio-Ins	4,441 142	52,583 12 11 84	48,452 86 10 91	2 42%	182 00	0 38%
MFS Research International Fund-I	8,459 894	151,516 70 17 91	140,011 25 16 55	6 98%	2,588 00	1 85%
Total International Equity Mutual Funds		\$ 253,037.60	\$ 234,957.85	11.72%	\$ 3,357.00	1.43%
Total International Equities		\$ 301,896.46	\$ 282,730.91	14.10%	\$ 4,576.00	1.62%
Total Equity Investments		\$ 1,257,360.79	\$ 1,328,964.58	66.27%	\$ 19,378.00	1.46%

Fixed Income Investments**Credit**

Vanguard Intermediate Term Investment Grade Fund Adm	10,953 595	108,714 45 9 93	110,631 31 10 10	5 52%	3,012 00	2 72%
Total Credit		\$ 108,714.45	\$ 110,631.31	5.52%	\$ 3,012.00	2.72%

Diversified Taxable Mutual Funds

Baird Aggregate Bond Fund-Is	4,825 60	50,572 29 10 48	53,564 16 11 10	2 67%	1,264 00	2 36%
Commerce Bond Fund Fund #333	13,126 884	264,702 25 20 17	267,263 36 20 36	13 33%	7,589 00	2 84%
Dodge & Cox Income Fund	3,704 42	50,565 33 13 65	51,343 26 13 86	2 56%	1,622 00	3 16%
Total Diversified Taxable Mutual Funds		\$ 365,839.87	\$ 372,170.78	18.56%	\$ 10,475.00	2.82%

Taxable High Yield Funds

Blackrock High Yield Bond Portfolio	7,442 547	57,977 44 7 79	56,637 78 7 61	2 82%	3,362 00	5 94%
Total Taxable High Yield Funds		\$ 57,977.44	\$ 56,637.78	2.82%	\$ 3,362.00	5.94%

Domestic Preferred Stock

Statement A

Simonson Family Charitable Fndn
October 1, 2015 - September 30, 2016

EIN 37-6560385

Account Number 46-0059-01-7

List of Assets

<i>Description</i>	<i>Shares</i>	<i>Cost/ Per Unit</i>	<i>Market Value/ Per Unit</i>	<i>Percent Of Assets</i>	<i>Projected Annual Income</i>	<i>Current Yield</i>
iShares US Preferred Stock ETF	216	8,125.70 37.62	8,532.00 39.50	0.43%	484.00	5.68%
Total Domestic Preferred Stock		\$ 8,125.70	\$ 8,532.00	0.43%	\$ 484.00	5.68%
Emerging Markets						
Fidelity Advisor Emerging Markets Income Fund Class I	600.545	8,064.64 13.43	8,467.68 14.10	0.42%	432.00	5.10%
Pimco Emerging Local Bond Fund Is	747.579	7,064.62 9.45	5,591.89 7.48	0.28%	305.00	5.46%
Total Emerging Markets		\$ 15,129.26	\$ 14,059.57	0.70%	\$ 737.00	5.24%
Total Fixed Income Investments		\$ 555,786.72	\$ 562,031.44	28.03%	\$ 18,070.00	3.22%
Alternative Investments						
Hedge Funds						
Robeco Boston Partners Long/Short Research Fund	2,000.77	28,510.97 14.25	30,251.64 15.12	1.51%	0.00	0.00%
Total Hedge Funds		\$ 28,510.97	\$ 30,251.64	1.51%	\$ 0.00	0.00%
Infrastructure						
JP Morgan Alerian MLP Index Etn	915	35,803.82 39.13	28,822.50 31.50	1.44%	1,969.00	6.83%
Total Infrastructure		\$ 35,803.82	\$ 28,822.50	1.44%	\$ 1,969.00	6.83%
Traded Real Estate						
Vanguard REIT Index Fund-Adm	258.139	30,989.54 120.05	31,745.93 122.98	1.58%	1,235.00	3.89%
Total Traded Real Estate		\$ 30,989.54	\$ 31,745.93	1.58%	\$ 1,235.00	3.89%
Total Alternative Investments		\$ 95,304.33	\$ 90,820.07	4.53%	\$ 3,204.00	3.53%

Statement A

Simonson Family Charitable Fndn
October 1, 2015 - September 30, 2016

EIN 37-6560385

Account Number 46-0059-01-7

List of Assets

<i>Description</i>	<i>Shares</i>	<i>Cost/ Per Unit</i>	<i>Market Value/ Per Unit</i>	<i>Percent Of Assets</i>	<i>Projected Annual Income</i>	<i>Current Yield</i>
Net Assets and Liabilities		\$ 1,932,096.93	\$ 2,005,461.18	100.00%	\$ 40,667.00	2.03%

Statement A

Simonson Family Charitable Foundation
FORM 990PF, PART XVII, LINE 2b -
INFORMATION REGARDING AFFILIATION
WITH TAX-EXEMPT ORGANIZATIONS
DESCRIBED IN SEC. 501(C) OF THE CODE
(OTHER THAN SEC. 501(C)(3)) OR IN SEC. 527

NAME OF ORGANIZATION:
MOUNT HOPE MAUSOLEUM ENDOWMENT
TYPE OF ORGANIZATION:
501(C)(13)
DESCRIPTION OF RELATIONSHIP:
COMMON TRUSTEE

NAME OF ORGANIZATION:
ANN A TRAVER CHARITABLE TRUST B
TYPE OF ORGANIZATION:
501(C)(4)
DESCRIPTION OF RELATIONSHIP:
COMMON TRUSTEE

NAME OF ORGANIZATION:
IVY J TRIMMER - CHRISTIAN CHURCH
TYPE OF ORGANIZATION:
501(C)(4)
DESCRIPTION OF RELATIONSHIP:
COMMON TRUSTEE

NAME OF ORGANIZATION:
IVY J TRIMMER TRUST
TYPE OF ORGANIZATION:
501(C)(4)
DESCRIPTION OF RELATIONSHIP:
COMMON TRUSTEE

EIN: 37-6560385

NAME OF ORGANIZATION:
ALICE G OGG TRUST UNDER WILL
TYPE OF ORGANIZATION:
501(C)(4)
DESCRIPTION OF RELATIONSHIP:
COMMON TRUSTEE

NAME OF ORGANIZATION:
MARY HARTMANN FOUNDATION
TYPE OF ORGANIZATION:
501(C)(4)
DESCRIPTION OF RELATIONSHIP:
COMMON TRUSTEE

NAME OF ORGANIZATION:
SHAARE SHOLEM CEMETERY TRUST
TYPE OF ORGANIZATION:
501(C)(13)
DESCRIPTION OF RELATIONSHIP:
COMMON TRUSTEE

NAME OF ORGANIZATION:
ADATH JOSEPH CEMETERY FUND
TYPE OF ORGANIZATION:
501(C)(13)
DESCRIPTION OF RELATIONSHIP:
COMMON TRUSTEE

NAME OF ORGANIZATION:
NINA BOZARTH T/U/W FBO KAMPF
CEMETERY
TYPE OF ORGANIZATION:
501(C)(13)
DESCRIPTION OF RELATIONSHIP:
COMMON TRUSTEE