Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶ Do not enter social security numbers on this form as it may be made public.
▶ Information about Form 990-PF and its instructions is at *www.irs.gov/form990pf*.

OMB No 1545-0052

2016

Open to Public Inspection

For calendar year 2016, or tax year beginning 01-01-2016 , and ending 12-31-2016

Name of foundation
KAO FAMILY FOUNDATION

A Employer identification number
20-2014620

Number and street (or P O box number if mail is not delivered to street address)
1200 EAST 151ST STREET

Room/suite

B Telephone number (see instructions)
(913) 897-8200

City or town, state or province, country, and ZIP or foreign postal code
OLATHE, KS 66062

C If exemption application is pending, check here ▶ ☐

G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

D 1. Foreign organizations, check here ▶ ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

H Check type of organization ☑ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐

I Fair market value of all assets at end of year *(from Part II, col (c), line 16)*▶$ 26,582,280

J Accounting method ☑ Cash ☐ Accrual
☐ Other (specify)
(Part I, column (d) must be on cash basis)

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

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))

	Line	Description	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)	3,164			
	2	Check ▶ ☐ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	887,983	887,983		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	115,638			
	b	Gross sales price for all assets on line 6a 2,027,848				
	7	Capital gain net income (from Part IV, line 2)		115,638		
	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)	10,406	10,406		
	12	**Total.** Add lines 1 through 11	1,017,191	1,014,027		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	0	0		0
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)	2,978	2,978		0
	c	Other professional fees (attach schedule)	21,652	21,652		0
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	14,788	5,388		0
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)	9,010	744		0
	24	**Total operating and administrative expenses.** Add lines 13 through 23	48,428	30,762		0
	25	Contributions, gifts, grants paid	1,155,700			1,155,700
	26	**Total expenses and disbursements.** Add lines 24 and 25	1,204,128	30,762		1,155,700
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	-186,937			
	b	**Net investment income** (if negative, enter -0-)		983,265		
	c	**Adjusted net income**(if negative, enter -0-)				

Part II	Balance Sheets — Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets				
1	Cash—non-interest-bearing			
2	Savings and temporary cash investments	424,530	168,313	168,313
3	Accounts receivable ▶			
	Less allowance for doubtful accounts ▶			
4	Pledges receivable ▶			
	Less allowance for doubtful accounts ▶			
5	Grants receivable			
6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
7	Other notes and loans receivable (attach schedule) ▶			
	Less allowance for doubtful accounts ▶			
8	Inventories for sale or use			
9	Prepaid expenses and deferred charges			
10a	Investments—U S and state government obligations (attach schedule)	729,119	303,150	305,853
b	Investments—corporate stock (attach schedule)	1,651,671	1,234,446	18,173,295
c	Investments—corporate bonds (attach schedule)	2,717,013	3,554,297	3,502,297
11	Investments—land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
12	Investments—mortgage loans			
13	Investments—other (attach schedule)	3,606,066	3,681,256	4,432,522
14	Land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
15	Other assets (describe ▶)			
16	**Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	9,128,399	8,941,462	26,582,280
Liabilities				
17	Accounts payable and accrued expenses			
18	Grants payable			
19	Deferred revenue			
20	Loans from officers, directors, trustees, and other disqualified persons			
21	Mortgages and other notes payable (attach schedule)			
22	Other liabilities (describe ▶)			
23	**Total liabilities**(add lines 17 through 22)	0	0	
Net Assets or Fund Balances				
	Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.			
24	Unrestricted			
25	Temporarily restricted			
26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☑ and complete lines 27 through 31.			
27	Capital stock, trust principal, or current funds	0	0	
28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
29	Retained earnings, accumulated income, endowment, or other funds	9,128,399	8,941,462	
30	**Total net assets or fund balances** (see instructions)	9,128,399	8,941,462	
31	**Total liabilities and net assets/fund balances** (see instructions)	9,128,399	8,941,462	

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	9,128,399
2	Enter amount from Part I, line 27a	2	-186,937
3	Other increases not included in line 2 (itemize) ▶	3	0
4	Add lines 1, 2, and 3	4	8,941,462
5	Decreases not included in line 2 (itemize) ▶	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	8,941,462

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	See Additional Data Table			
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	See Additional Data Table			
b				
c				
d				
e				

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a	See Additional Data Table			
b				
c				
d				
e				

2	Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	115,638
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 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))
2015	1,072,842	19,526,489	0 054943
2014	995,531	18,289,565	0 054432
2013	862,405	15,660,109	0 055070
2012	767,707	14,160,757	0 054214
2011	674,779	12,289,761	0 054906

2	**Total** of line 1, column (d)	2	0 273565
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 054713
4	Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	19,440,601
5	Multiply line 4 by line 3	5	1,063,654
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	9,833
7	Add lines 5 and 6	7	1,073,487
8	Enter qualifying distributions from Part XII, line 4	8	1,155,700

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 ▶ ☐ and enter "N/A" on line 1 Date of ruling or determination letter ________ **(attach copy of letter if necessary–see instructions)**			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☑ and enter 1% of Part I, line 27b		1	9,833
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	0
3	Add lines 1 and 2		3	9,833
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	0
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-		5	9,833
6	Credits/Payments			
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a 8,876		
b	Exempt foreign organizations—tax withheld at source	6b		
c	Tax paid with application for extension of time to file (Form 8868)	6c 1,500		
d	Backup withholding erroneously withheld	6d		
7	Total credits and payments Add lines 6a through 6d		7	10,376
8	Enter any **penalty** for underpayment of estimated tax Check here ☑ if Form 2220 is attached		8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶		9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶		10	543
11	Enter the amount of line 10 to be **Credited to 2017 estimated tax** ▶ 543	**Refunded** ▶	11	0

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		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)?	1b		No
	*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*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year **(1)** On the foundation ▶ $ 0 **(2)** On foundation managers ▶ $ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities*	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T*	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col (c), and Part XV*	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶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	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 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? *If "Yes," complete Part XIV*	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		No

Part VII-A Statements Regarding Activities (continued)

		Line	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)	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?	13	Yes	

Website address ▶N/A

14 The books are in care of ▶MIN H KAO Telephone no ▶(913) 397-8200

Located at ▶1200 EAST 151ST STREET OLATHE KS ZIP+4 ▶66062

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

		Line	Yes	No
16	At any time during calendar year 2016, 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?	16		No
	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 ▶			

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. Yes No

1a During the year did the foundation (either directly or indirectly)

(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☑ No

(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☑ No

(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☑ No

(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☑ No

(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☑ No

(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☑ No

		Line	Yes	No
b	If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	1b		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2016?	1c		No

2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))

a At the end of tax year 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016? ☐ Yes ☑ No

If "Yes," list the years ▶ 20____, 20____, 20____, 20____

		Line	Yes	No
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see instructions)	2b		

c If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here
▶ 20____, 20____, 20____, 20____

3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☑ No

		Line	Yes	No
b	If "Yes," did it have excess business holdings in 2016 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 2016).*	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 2016?	4b		No

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

5a	During the year did the foundation pay or incur any amount to				
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes ☑ No			
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	☐ Yes ☑ No			
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes ☑ No			
	(4) Provide a grant to an organization other than a charitable, etc , organization described in section 4945(d)(4)(A)? (see instructions)	☐ Yes ☑ No			
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes ☑ No			
b	If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see instructions)?		**5b**		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐				
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	☐ Yes ☐ No			
	If "Yes," attach the statement required by Regulations section 53 4945–5(d)				
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes ☑ No			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		**6b**		No
	If "Yes" to 6b, file Form 8870				
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes ☑ No			
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?		**7b**		

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

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

(a) Name and address	Title, and average hours per week **(b)** devoted to position	**(c)** Compensation **(If not paid, enter -0-)**	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
MIN H KAO 1200 EAST 151ST STREET OLATHE, KS 66062	PRES, DIRECTOR 0 00	0	0	0
KENNETH KAO 1200 EAST 151ST STREET OLATHE, KS 66062	VP, SEC , DIR 0 00	0	0	0
YU-FAN C KAO 1200 EAST 151ST STREET OLATHE, KS 66062	TREAS, DIRECTOR 0 00	0	0	0
JENNIFER KAO 1200 EAST 151ST STREET OLATHE, KS 66062	DIRECTOR 0 00	0	0	0

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

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

Total number of other employees paid over $50,000 ▶ 0

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

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

(a) Name and address of each person paid more than $50,000	**(b)** Type of service	**(c)** Compensation
NONE		
Total number of others receiving over $50,000 for professional services. . . . . ▶		0

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

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

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

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	19,400,032
b	Average of monthly cash balances.	1b	336,619
c	Fair market value of all other assets (see instructions).	1c	0
d	**Total** (add lines 1a, b, and c).	1d	19,736,651
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation). — 1e: 0		
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	19,736,651
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	296,050
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	19,440,601
6	**Minimum investment return.** Enter 5% of line 5.	6	972,030

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	972,030
2a	Tax on investment income for 2016 from Part VI, line 5. — 2a: 9,833		
b	Income tax for 2016 (This does not include the tax from Part VI). — 2b:		
c	Add lines 2a and 2b.	2c	9,833
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	962,197
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	962,197
6	Deduction from distributable amount (see instructions).	6	0
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	962,197

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	1,155,700
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	1,155,700
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	9,833
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4.	6	1,145,867

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 2015	(c) 2015	(d) 2016
1 Distributable amount for 2016 from Part XI, line 7					962,197
2 Undistributed income, if any, as of the end of 2016					
a Enter amount for 2015 only.				0	
b Total for prior years 20___, 20___, 20___			0		
3 Excess distributions carryover, if any, to 2016					
a From 2011.	71,705				
b From 2012.	72,655				
c From 2013.	94,590				
d From 2014.	96,791				
e From 2015.	113,320				
f **Total** of lines 3a through e.		449,061			
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ $ 1,155,700					
a Applied to 2015, but not more than line 2a				0	
b Applied to undistributed income of prior years (Election required—see instructions).			0		
c Treated as distributions out of corpus (Election required—see instructions).		0			
d Applied to 2016 distributable amount.					962,197
e Remaining amount distributed out of corpus		193,503			
5 Excess distributions carryover applied to 2016 *(If an amount appears in column (d), the same amount must be shown in column (a))*		0			0
6 **Enter the net total of each column as indicated below:**					
a Corpus Add lines 3f, 4c, and 4e Subtract line 5		642,564			
b Prior years' undistributed income Subtract line 4b from line 2b			0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.			0		
d Subtract line 6c from line 6b Taxable amount —see instructions			0		
e Undistributed income for 2015 Subtract line 4a from line 2a Taxable amount—see instructions				0	
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2017					0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)		0			
8 Excess distributions carryover from 2011 not applied on line 5 or line 7 (see instructions)		71,705			
9 **Excess distributions carryover to 2017.** Subtract lines 7 and 8 from line 6a		570,859			
10 Analysis of line 9					
a Excess from 2012.	72,655				
b Excess from 2013.	94,590				
c Excess from 2014.	96,791				
d Excess from 2015.	113,320				
e Excess from 2016.	193,503				

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2016, enter the date of the ruling. . . . . . . ▶

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

	Tax year	Prior 3 years			(e) Total
	(a) 2016	(b) 2015	(c) 2014	(d) 2013	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon a "Assets" alternative test—enter (1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test—enter (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the organization had $5,000 or more in assets at any time during the year—see instructions.)

1 **Information Regarding Foundation Managers:**

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than $5,000) (See section 507(d)(2))

MIN H KAO

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

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

Check here ▶ ☑ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds If the foundation makes gifts, grants, etc (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

a The name, address, and telephone number or email address of the person to whom applications should be addressed

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

c Any submission deadlines

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

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 Additional Data Table				
Total . . . . ▶ **3a**				1,155,700
b *Approved for future payment*				
Total . . . . ▶ **3b**				0

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income (a) Business code	(b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	(d) Amount	(e) Related or exempt function income (See instructions)
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	887,983	
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.			14	10,406	
8 Gain or (loss) from sales of assets other than inventory			18	115,638	
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).		0		1,014,027	0

13 Total. Add line 12, columns (b), (d), and (e). 13 1,014,027

(See worksheet in line 13 instructions to verify calculations)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)

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)**		No
(2) Other assets.	**1a(2)**		No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization.	**1b(1)**		No
(2) Purchases of assets from a noncharitable exempt organization.	**1b(2)**		No
(3) Rental of facilities, equipment, or other assets.	**1b(3)**		No
(4) Reimbursement arrangements.	**1b(4)**		No
(5) Loans or loan guarantees.	**1b(5)**		No
(6) Performance of services or membership or fundraising solicitations.	**1b(6)**		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	**1c**		No

d If the answer to any of the above is "Yes," complete the following schedule Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received

(a) Line No	**(b)** Amount involved	**(c)** Name of noncharitable exempt organization	**(d)** Description of transfers, transactions, and sharing arrangements

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

b If "Yes," complete the following schedule

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

Sign Here

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

******	2017-11-10	******	May the IRS discuss this return with the preparer shown below (see instr)? ☑ **Yes** ☐ **No**
Signature of officer or trustee	Date	Title	

Paid Preparer Use Only

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ▶ ☐	PTIN
BRIAN NAIL		2017-11-10		P00907087
Firm's name ▶ NAIL CPA FIRM LC				Firm's EIN ▶20-4532171
Firm's address ▶ 4901 WEST 136TH STREET LEAWOOD, KS 66224				Phone no (913) 663-2500

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

(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)
CREDIT SUISSE GRP 5000 *16JL29		2014-07-25	2016-04-29
FHLB 2000 *25MY20		2015-05-13	2016-02-22
CLAYTON CNTY & BE 1800 19MY01		2013-06-20	2016-02-04
GOLDMAN SACHS GRP INC FLTG RT		2010-10-29	2016-08-29
PITNEY BOWES INC 5750 17SP15		2009-06-30	2016-02-04
VERIZON COMMUNICATIONS		2011-01-21	2016-02-10
ALLIANZ SE ADS		2015-11-04	2016-09-27
BALL CORPORATION		2016-07-21	2016-07-21
BALL CORPORATION		2016-07-21	2016-08-04
BAYER AG SPON ADR		2015-11-04	2016-09-27

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

(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)
250,000		244,627	5,373
250,000		250,000	0
200,916		197,600	3,316
488,383		485,436	2,947
184,290		177,564	6,726
50,257		34,953	15,304
1,523		1,837	-314
29		30	-1
1,476		1,356	120
3,084		4,134	-1,050

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			5,373
			0
			3,316
			2,947
			6,726
			15,304
			-314
			-1
			120
			-1,050

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

(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)
BAYER AG SPON ADR		2015-11-04	2016-10-20
BAYER AG SPON ADR		2016-01-11	2016-11-22
MICHELIN COMPAGNIE GENERALE DE		2015-02-05	2016-02-02
REXAM PLC		2016-01-11	2016-07-21
REXAM PLC		2016-01-11	2016-07-21
SONIC HEALTHCARE LTD ADR		2016-01-11	2016-02-02
SOUTH32 LTD ADR		2015-05-25	2016-01-11
ABB LTD		2012-01-09	2016-02-02
BAYERAGSPONADR		2015-11-04	2016-11-22
BCEINC(NEW)		2014-03-04	2016-02-02

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

(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)
2,073		2,800	-727
769		901	-132
1,073		1,219	-146
892		905	-13
538		546	-8
1,600		1,525	75
250		720	-470
671		780	-109
1,250		1,734	-484
1,205		1,306	-101

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-727
			-132
			-146
			-13
			-8
			75
			-470
			-109
			-484
			-101

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

(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)
BCEINC(NEW)		2014-03-04	2016-11-22
CNOOC LTD ADS		2014-08-22	2016-01-11
DEUTSCHE TELEKOM AG 1 ORD 1ADS		2013-09-12	2016-01-11
DEUTSCHE TELEKOM AG 1 ORD 1ADS		2013-10-10	2016-01-11
DEUTSCHE TELEKOM AG 1 ORD 1ADS		2013-09-12	2016-02-02
DEUTSCHE TELEKOM AG 1 ORD 1ADS		2013-09-12	2016-12-12
GLAXOSMITHKLINE PLC ADS		2013-01-11	2016-02-02
IMPERIAL BRANDS PLC SPD ADR		2013-04-24	2016-12-12
IMPERIAL TOBACCO GP PLC SP ADR		2014-03-04	2016-01-11
IMPERIAL TOBACCO GP PLC SP ADR		2013-04-24	2016-02-02

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

(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)
2,116		2,134	-18
757		1,553	-796
1,958		1,519	439
5,873		5,350	523
430		330	100
1,490		1,189	301
1,838		2,000	-162
3,771		3,046	725
6,242		5,115	1,127
1,728		1,133	595

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			**(l)** Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	**(j)** Adjusted basis as of 12/31/69	**(k)** Excess of col (i) over col (j), if any	
			-18
			-796
			439
			523
			100
			301
			-162
			725
			1,127
			595

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

(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)
JAPAN TOB INC		2014-10-24	2016-02-02
MANULIFE FINANCIAL CORP		2013-08-09	2016-01-11
MUENCHENER RUECK-UNSPONS ADR		2012-04-13	2016-01-11
NIPPON TELEGRAPH&TELEPHONE ADS		2013-07-23	2016-01-11
NIPPON TELEGRAPH&TELEPHONE ADS		2013-08-08	2016-01-11
NIPPON TELEGRAPH&TELEPHONE ADS		2013-07-23	2016-02-02
NIPPON TELEGRAPH&TELEPHONE ADS		2013-07-23	2016-11-22
ORKLA ADR A SHS		2014-02-13	2016-01-11
ORKLA ADR A SHS		2014-05-02	2016-01-11
ORKLA ADR A SHS		2014-05-05	2016-01-11

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

(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)
3,820		3,167	653
1,522		1,971	-449
2,730		2,107	623
1,000		674	326
8,599		5,740	2,859
1,963		1,214	749
801		539	262
2,539		2,671	-132
6,421		7,358	-937
979		1,112	-133

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			653
			-449
			623
			326
			2,859
			749
			262
			-132
			-937
			-133

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

(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)
ORKLA ADR A SHS		2014-02-11	2016-02-02
PT TELEKOMUNIKASI INDONESIA		2012-04-17	2016-01-11
PT TELEKOMUNIKASI INDONESIA		2012-04-17	2016-09-27
REXAM PLC		2014-05-22	2016-06-16
REXAM PLC		2014-05-22	2016-07-21
REXAM PLC		2014-05-22	2016-07-21
REXAM PLC		2014-05-23	2016-07-21
REXAM PLC		2014-05-23	2016-07-21
RIOCAN REAL EST 1NVT TFT		2013-01-08	2016-08-04
RIOCAN REAL EST 1NVT TFT		2013-01-09	2016-08-04

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

(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)
867		836	31
9,353		7,201	2,152
3,976		2,062	1,914
5,357		6,143	-786
324		380	-56
196		229	-33
1,081		1,277	-196
652		771	-119
437		551	-114
1,093		1,392	-299

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			31
			2,152
			1,914
			-786
			-56
			-33
			-196
			-119
			-114
			-299

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

(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)
RIOCAN REAL EST 1NVT TFT		2013-01-14	2016-08-04
SSE PLC SPON ADR		2014-03-20	2016-01-11
SSE PLC SPON ADR		2014-05-01	2016-01-11
SSE PLC SPON ADR		2014-10-17	2016-01-11
SSE PLC SPON ADR		2014-03-20	2016-11-22
STATOILASAADR		2012-01-19	2016-09-27
STATOILASAADR		2012-05-15	2016-09-27
STATOILASAADR		2014-03-28	2016-09-27
ASTRAZENECA PLC ADS		2008-10-13	2016-02-02
BAYER AG SPON ADR		2010-11-15	2016-09-27

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

(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)
328		415	-87
323		372	-49
2,581		3,113	-532
3,549		4,074	-525
3,803		5,214	-1,411
613		1,020	-407
3,832		6,286	-2,454
460		847	-387
646		395	251
7,958		6,117	1,841

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			**(l)** Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	**(j)** Adjusted basis as of 12/31/69	**(k)** Excess of col (i) over col (j), if any	
			-87
			-49
			-532
			-525
			-1,411
			-407
			-2,454
			-387
			251
			1,841

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

(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)
BOC HONG KONG LTD SPONS ADR		2010-02-22	2016-01-11
DEUTSCHE POST AG SPONSORED ADR		2011-02-09	2016-01-11
DEUTSCHE POST AG SPONSORED ADR		2011-02-09	2016-08-04
MTN GRP LTD SPONS ADR		2010-12-22	2016-06-09
MTN GRP LTD SPONS ADR		2011-07-28	2016-06-09
MTN GRP LTD SPONS ADR		2011-07-29	2016-06-09
MUENCHENER RUECK-UNSPONS ADR		2009-06-05	2016-09-27
NESTLE SPON ADR REP REG SHR		2007-07-19	2016-02-02
NOVARTIS AG ADR		2009-03-19	2016-09-26
RIOCAN REAL EST INVT TR		2007-10-18	2016-08-04

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

(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)
1,076		877	199
6,414		4,690	1,724
6,302		3,950	2,352
3,406		8,092	-4,686
1,080		2,823	-1,743
2,077		5,401	-3,324
2,127		1,607	520
1,472		791	681
1,211		566	645
5,248		5,851	-603

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			199
			1,724
			2,352
			-4,686
			-1,743
			-3,324
			520
			681
			645
			-603

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

(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)
ROYAL DUTCH SHELL PLC CL B		2010-10-15	2016-02-02
SIEMENS AKTIENGESELLSCHAFT		2010-01-29	2016-02-02
SINGAPORE TELECOM LTD ADR NEW		2007-08-29	2016-02-02
UNILEVER NV NY SH NEW		2008-10-02	2016-01-11
UNILEVER NV NY SH NEW		2011-08-10	2016-01-11
UTD OVERSEAS BK LTD SPON ADR		2007-11-29	2016-01-11
ADIENT PLC COM		2016-10-28	2016-10-28
JOHNSON CONTROLS INCORPORATED		2016-06-08	2016-09-06
JOHNSON CONTROLS INCORPORATED		2016-06-08	2016-09-06
JOHNSON CTLS INTL PLC		2016-09-06	2016-09-06

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

(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)
499		743	-244
745		703	42
366		362	4
2,436		1,654	782
2,639		2,001	638
2,544		2,715	-171
31		33	-2
20,428		20,744	-316
3,065		3,113	-48
5		5	0

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-244
			42
			4
			782
			638
			-171
			-2
			-316
			-48
			0

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

(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)
SYMANTEC CORP		2016-01-11	2016-03-31
VODAFONE GROUP PLC		2016-01-11	2016-11-09
CHUBB LTD		2015-09-18	2016-12-23
CISCO SYS INC		2012-09-18	2016-12-23
INTEL CORP		2013-06-20	2016-01-11
INTEL CORP		2014-03-24	2016-01-11
JPMORGAN CHASE & CO		2012-03-28	2016-12-23
METLIFE INCORPORATED		2013-03-26	2016-12-23
RAYTHEON CO (NEW)		2012-04-18	2016-01-11
RAYTHEON CO (NEW)		2012-04-18	2016-11-09

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

(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)
11,259		12,464	-1,205
6,346		7,449	-1,103
9,996		7,537	2,459
11,396		7,154	4,242
29,041		22,307	6,734
5,425		4,248	1,177
31,545		16,617	14,928
12,828		9,067	3,761
11,649		5,024	6,625
19,211		6,981	12,230

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-1,205
			-1,103
			2,459
			4,242
			6,734
			1,177
			14,928
			3,761
			6,625
			12,230

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

(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)
SYMANTEC CORP		2014-03-13	2016-03-31
VODAFONE GROUP PLC		2013-06-20	2016-11-09
ALTRIA GROUP INC		2008-04-07	2016-02-03
AT&T INC		2007-07-19	2016-12-23
BOEING CO		2009-05-11	2016-12-23
CHEVRON CORP		2007-07-19	2016-12-23
CHEVRON CORP		2007-08-28	2016-12-23
CHEVRON CORP		2007-10-17	2016-12-23
CHEVRON CORP		2007-11-02	2016-12-23
DU PONT EL DE NEMOURS & CO		2009-12-30	2016-12-23

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

(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)
28,101		31,000	-2,899
149		276	-127
7,437		2,740	4,697
16,972		15,816	1,156
11,452		3,282	8,170
1,184		931	253
14,208		10,208	4,000
9,472		7,398	2,074
6,867		5,090	1,777
10,849		4,680	6,169

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-2,899
			-127
			4,697
			1,156
			8,170
			253
			4,000
			2,074
			1,777
			6,169

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

(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)
GENERAL ELECTRIC CO		2007-07-19	2016-12-23
JOHNSON & JOHNSON		2008-10-10	2016-11-09
KIMBERLY CLARK CORP		2007-12-04	2016-01-11
MICROSOFT CORP		2011-07-27	2016-01-11
MICROSOFT CORP		2009-04-20	2016-11-09
NEXTERA ENERGY INC COM		2009-02-20	2016-01-11
NEXTERA ENERGY INC COM		2009-02-20	2016-02-03
ROYAL DUTCH SHELL PLC CL B		2011-03-29	2016-12-23
VODAFONE GROUP PLC		2007-07-19	2016-11-09
VODAFONE GROUP PLC		2007-08-28	2016-11-09

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

(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)
8,603		10,978	-2,375
7,375		3,444	3,931
7,541		3,965	3,576
12,305		6,536	5,769
3,460		1,093	2,367
9,582		4,383	5,199
3,420		1,461	1,959
25,951		32,310	-6,359
9,980		22,325	-12,345
4,775		10,003	-5,228

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-2,375
			3,931
			3,576
			5,769
			2,367
			5,199
			1,959
			-6,359
			-12,345
			-5,228

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

(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)
VODAFONE GROUP PLC		2007-10-17	2016-11-09
VODAFONE GROUP PLC		2007-11-02	2016-11-09
VODAFONE GROUP PLC		2007-12-04	2016-11-09
VODAFONE GROUP PLC		2008-11-13	2016-11-09
WELLTOWER INC		2007-11-02	2016-01-11
WELLTOWER INC		2007-12-04	2016-01-11
3M COMPANY		2009-01-05	2016-01-11
3M COMPANY		2009-01-05	2016-12-23
QUALITY CARE PROPERTIES INC		2016-10-31	2016-11-09
CAPITAL GAINS DIVIDENDS	P		

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

(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)
2,238		5,382	-3,144
1,940		4,990	-3,050
3,730		9,318	-5,588
7,908		9,544	-1,636
4,146		2,249	1,897
10,364		5,695	4,669
24,558		10,223	14,335
12,347		4,031	8,316
4,072		8,700	-4,628
710			710

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-3,144
			-3,050
			-5,588
			-1,636
			1,897
			4,669
			14,335
			8,316
			-4,628
			710

Form 990PF Part XV Line 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*				
BOYS & GIRLS CLUBS OF KANSAS CITY 401 BLUE PARKWAY SUITE 102 KANSAS CITY, MO 64130	NONE	PUBLIC	ORGANIZATION'S GENERAL CHARITABLE PURPOSES	50,000
IOWA STATE UNIVERSITY FOUNDATION 313 MARSTON HALL AMES, IA 50011	NONE	PUBLIC	ORGANIZATION'S GENERAL CHARITABLE PURPOSES	83,550
KANSAS CITY BALLET 500 W PERSHING ROAD KANSAS CITY, MO 64108	NONE	PUBLIC	ORGANIZATION'S GENERAL CHARITABLE PURPOSES	8,992
KANSAS CITY JAZZ ORCHESTRA PO BOX 12841 SHAWNEE MISSION, KS 66282	NONE	PUBLIC	ORGANIZATION'S GENERAL CHARITABLE PURPOSES	850
KANSAS CITY SYMPHONY 1020 CENTRAL KANSAS CITY, MO 64105	NONE	PUBLIC	ORGANIZATION'S GENERAL CHARITABLE PURPOSES	48,358
Total . . . . ▶ 3a				1,155,700

Form 990PF Part XV Line 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*				
KANSAS STATE UNIVERSITY FOUNDATION 2323 ANDERSON AVENUE SUITE 500 MANHATTAN, KS 66502	NONE	PUBLIC	ORGANIZATION'S GENERAL CHARITABLE PURPOSES	218,400
KANSAS UNIVERSITY ENDOWMENT ASSOC 1891 CONSTANT AVENUE LAWRENCE, KS 66044	NONE	PUBLIC	ORGANIZATION'S GENERAL CHARITABLE PURPOSES	253,000
MISSOURI UNIVERSITY OF SCIENCE & TECHNOLOGY 400 W 10TH STREET ROLLA, MO 65409	NONE	PUBLIC	ORGANIZATION'S GENERAL CHARITABLE PURPOSES	104,000
OREGON STATE UNIVERSITY FOUNDATION 850 SW 35TH STREET CORVALIS, OR 97333	NONE	PUBLIC	ORGANIZATION'S GENERAL CHARITABLE PURPOSES	100,800
ROSE-HULMAN INSTITUTE OF TECHNOLOGY 5500 WABASH AVE TERRE HAUTE, IN 478033920	NONE	PUBLIC	ORGANIZATION'S GENERAL CHARITABLE PURPOSES	24,000
Total . . . . ▶ **3a**				1,155,700

Form 990PF Part XV Line 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*				
SCLERODERMA RESEARCH FOUNDATION 220 MONTGOMERY ST SUITE 1411 SAN FRANCISCO, CA 64104	NONE	PUBLIC	ORGANIZATION'S GENERAL CHARITABLE PURPOSES	8,750
UNITED WAY OF GREATER KANSAS CITY 1080 WASHINGTON STREET KANSAS CITY, MO 64105	NONE	PUBLIC	ORGANIZATION'S GENERAL CHARITABLE PURPOSES	50,000
UNIVERSITY OF MO - COLUMBIA W1006 LAFFERRE HALL COLUMBIA, MO 65211	NONE	PUBLIC	ORGANIZATION'S GENERAL CHARITABLE PURPOSES	84,000
UNIVERSITY OF NEBRASKA FOUNDATION 1010 LINCOLN MALL SUITE 300 LINCOLN, NE 68508	NONE	PUBLIC	ORGANIZATION'S GENERAL CHARITABLE PURPOSES	96,000
HARRIMAN-JEWELL SERIES 500 COLLEGE HILL LIBERTY, MO 64068	NONE	PUBLIC	ORGANIZATION'S GENERAL CHARITABLE PURPOSES	25,000
Total . . . . ▶ 3a				1,155,700

TY 2016 Accounting Fees Schedule

Name: KAO FAMILY FOUNDATION

EIN: 20-2014620

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	2,978	2,978		0

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TY 2016 Investments Corporate Bonds Schedule

Name: KAO FAMILY FOUNDATION

EIN: 20-2014620

Name of Bond	End of Year Book Value	End of Year Fair Market Value
BANK OF AMERICA CORP	103,844	104,500
BARCLAYS BANK PLC	264,375	260,080
CITIGROUP INC	253,375	235,625
CITIGROUP INC	104,332	103,500
CREDIT AGRICOLE SA	276,250	275,400
GENERAL ELECTRIC CO	105,020	103,770
GOLDMAN SACHS CAPT II	488,481	477,413
GOLDMAN SACHS GRP INC 5.375%	99,622	101,000
JPMORGAN CHASE 5.15	257,500	239,100
JPMORGAN CHASE 5.3	203,700	204,112
JPMORGAN CHASE 6.75	111,081	107,750
LLOYDS BANKING GROUP	211,880	206,000
SOCIETE GENERALE	272,977	261,000
CREDIT SUISSE GROUP AG	175,347	180,245
AT&T INC	175,555	181,823
GS CONTINGENT 8% WORST OF RTY SPX	250,000	251,225
WAL-MART STORES INC	200,958	209,754

TY 2016 Investments Corporate Stock Schedule

Name: KAO FAMILY FOUNDATION

EIN: 20-2014620

Name of Stock	End of Year Book Value	End of Year Fair Market Value
APPLE INC	56,225	81,074
GARMIN LTD	1,078,221	18,005,501
CAP ONE FINL CO	100,000	86,720

TY 2016 Investments Government Obligations Schedule

Name:	KAO FAMILY FOUNDATION
EIN:	20-2014620
US Government Securities - End of Year Book Value:	0
US Government Securities - End of Year Fair Market Value:	0
State & Local Government Securities - End of Year Book Value:	303,150
State & Local Government Securities - End of Year Fair Market Value:	305,853

TY 2016 Investments - Other Schedule

Name: KAO FAMILY FOUNDATION

EIN: 20-2014620

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
CREDIT SUISSE FLT RT HI INC	AT COST	249,951	247,839
DOUBLELINE TOTAL RETURN N	AT COST	400,000	378,579
METROPOLITAN WST UNCNSTRD BD M	AT COST	250,000	249,157
TEMPLETON GLOBAL BD FD A	AT COST	350,000	320,674
SHAFFER CULLIN CAP MGMT MANAGED FD	AT COST	1,582,114	2,335,744
SHAFFER CULLIN INTL MANAGED FD	AT COST	712,712	764,050
GCM GROSVENOR NET LEASE III FEEDER FUND	AT COST	136,479	136,479

TY 2016 Other Expenses Schedule

Name: KAO FAMILY FOUNDATION

EIN: 20-2014620

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CHARITY EVENTS	4,050	0		0
CHARITY WORKSHOPS	4,216	0		0
GCM GROSVENOR AG NET LEASE III FEEDER FND EXPENSES	744	744		0

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TY 2016 Other Income Schedule

Name: KAO FAMILY FOUNDATION

EIN: 20-2014620

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
GCM GROSVENOR AG NET LEASE III FEEDER FUND	406	406	406
MORGAN STANLEY 009	10,000	10,000	10,000

TY 2016 Other Professional Fees Schedule

Name: KAO FAMILY FOUNDATION

EIN: 20-2014620

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MORGAN STANLEY FEES	21,625	21,625		0
CREDIT SUISSE FEES	27	27		0

TY 2016 Taxes Schedule

Name: KAO FAMILY FOUNDATION

EIN: 20-2014620

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
2016 ESTIMATED TAXES	8,800	0		0
FOREIGN TAXES PAID	5,348	5,348		0
FRANCHISE FEE	40	40		0
BALANCE DUE ON 2015 TAXES	600	0		0

Schedule B
(Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ **Attach to Form 990, 990-EZ, or 990-PF**
▶ **Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at** ***www irs gov/form990***

OMB No 1545-0047

2016

Name of the organization	**Employer identification number**
KAO FAMILY FOUNDATION	20-2014620

Organization type (check one)

Filers of:	**Section:**
Form 990 or 990-EZ	☐ 501(c)( ) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☑ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 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 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals Complete Parts I, II, and III

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc , purposes, but no such contributions totaled more than $1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc , contributions totaling $5,000 or more during the year . . . . ▶ $ ____________

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

Name of organization
KAO FAMILY FOUNDATION

Employer identification number
20-2014620

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	MIN H KAO 1200 EAST 151ST STREET OLATHE, KS 66062	$ 5,515,905	Person ☐ Payroll ☐ Noncash ☑ (Complete Part II for noncash contributions)
-		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Name of organization	Employer identification number
KAO FAMILY FOUNDATION	20-2014620

Part II Noncash Property

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

(a) No.from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	111,500 SHARES OF GARMIN LTD STOCK	$ 5,515 905	2016-12-20

(a) No.from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No.from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No.from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No.from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No.from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

Name of organization
KAO FAMILY FOUNDATION

Employer identification number
20-2014620

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