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Form **990-PF**

Return of Private Foundation

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

OMB No 1545-0052

2016Department of the Treasury
Internal Revenue Service

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

Open to Public Inspection

For calendar year 2016 or tax year beginning , and ending

Name of foundation SmartGo Foundation		A Employer identification number 20-5290408
Number and street (or P O box number if mail is not delivered to street address) 3021 Chaucer Place	Room/suite	B Telephone number (see instructions) 801-582-0249
City or town, state or province, country, and ZIP or foreign postal code Salt Lake City UT 84108		C If exemption application is pending, check here ▶ <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here ▶ <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation ▶ <input type="checkbox"/>
H Check type of organization. <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 3,649,132	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ <input type="checkbox"/>

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)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	9,063	9,063		
	4 Dividends and interest from securities	46,593	46,295		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	-123,185			
	b Gross sales price for all assets on line 6a 5,480,478				
	7 Capital gain net income (from Part IV, line 2)		0		
	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) Stmt 1	-11,854	-11,854			
12 Total. Add lines 1 through 11	-79,383	43,504	0		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	95,000	18,900		75,600
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule) See Stmt 2	836			
	b Accounting fees (attach schedule) Stmt 3	4,711			
	c Other professional fees (attach schedule) Stmt 4	31,475	31,475		
	17 Interest				
	18 Taxes (attach schedule) (see instructions) Stmt 5	7,559	1,776		5,783
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (att sch)				
	24 Total operating and administrative expenses. Add lines 13 through 23	139,581	52,151	0	81,383
	25 Contributions, gifts, grants paid	150,770			150,770
26 Total expenses and disbursements. Add lines 24 and 25	290,351	52,151	0	232,153	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	-369,734				
b Net investment income (if negative, enter -0-)		0			
c Adjusted net income (if negative, enter -0-)			0		

For Paperwork Reduction Act Notice, see instructions.

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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	269,455	477,957	477,957
	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 (att schedule) ▶ Less allowance for doubtful accounts ▶	0		
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	1,295		
	10a Investments – U S and state government obligations (attach schedule)			
	b Investments – corporate stock (attach schedule) See Stmt 6	3,358,415	2,853,025	2,898,014
	c Investments – corporate bonds (attach schedule)			
	11 Investments – land, buildings, and equipment, basis ▶ Less accumulated depreciation (attach sch) ▶			
	12 Investments – mortgage loans			
	13 Investments – other (attach schedule) See Statement 7	275,964	204,413	273,161
	14 Land, buildings, and equipment, basis ▶ Less accumulated depreciation (attach sch) ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers – see the instructions Also, see page 1, item I)	3,905,129	3,535,395	3,649,132
Liabilities	17 Accounts payable and accrued expenses	16,229	16,229	
	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)	16,229	16,229	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ▶ <input checked="" type="checkbox"/>			
	24 Unrestricted	3,888,900	3,519,166	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input type="checkbox"/>			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 Total net assets or fund balances (see instructions)	3,888,900	3,519,166	
	31 Total liabilities and net assets/fund balances (see instructions)	3,905,129	3,535,395	

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	3,888,900
2 Enter amount from Part I, line 27a	2	-369,734
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	3,519,166
5 Decreases not included in line 2 (itemize) ▶	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 30	6	3,519,166

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 Worksheet				
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				
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				
(i) FMV 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				
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	-123,185
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	-170,514

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))
2015	227,383	4,407,694	0.051588
2014	251,748	4,459,596	0.056451
2013	204,695	4,347,516	0.047083
2012	237,383	4,358,279	0.054467
2011	243,383	4,708,600	0.051689
2 Total of line 1, column (d)			2 0.261278
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 0.052256
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5			4 3,702,505
5 Multiply line 4 by line 3			5 193,478
6 Enter 1% of net investment income (1% of Part I, line 27b)			6
7 Add lines 5 and 6			7 193,478
8 Enter qualifying distributions from Part XII, line 4 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.			8 232,153

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	
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	
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	0
6	Credits/Payments		
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a	660
b	Exempt foreign organizations – tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	660
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	660
11	Enter the amount of line 10 to be Credited to 2017 estimated tax 660 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?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)? <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>		X
c Did the foundation file Form 1120-POL for this year?		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? <i>If "Yes," attach a detailed description of the activities</i>		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? <i>If "Yes," attach a conformed copy of the changes</i>		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T</i>		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?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) UT		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation</i>	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 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>		X
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>		X

N/A

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? Website address ▶ N/A	X	
14 The books are in care of ▶ Anders Kierulf 3021 Chaucer Place Located at ▶ Salt Lake City UT ZIP+4 ▶ 84108 Telephone no ▶ 801-582-0249		
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 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? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ▶		X

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)? Organizations relying on a current notice regarding disaster assistance check here ▶ <input type="checkbox"/>		X
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?		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 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016? If "Yes," list the years ▶ 20 , 20 , 20 , 20	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)	N/A	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20 , 20 , 20 , 20		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 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)	N/A	
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 2016?		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)? ☐ N/A **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? ☐ N/A ☐ 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** ☐ Yes ☒ 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? ☐ N/A **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
Anders Kierulf 3021 Chaucer Place Salt Lake City UT 84108	Director 4.00	47,250	0	0
Sara A. Rich 3021 Chaucer Place Salt Lake City UT 84108	Director 4.00	47,250	0	0
Bjorn Kierulf 3021 Chaucer Place Salt Lake City UT 84108	Director 1.00	500	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				

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 ▶**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 N/A	
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 N/A	
2	
All other program-related investments See instructions	
3	

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	2,532,623
b	Average of monthly cash balances	1b	1,226,265
c	Fair market value of all other assets (see instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	3,758,888
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	3,758,888
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	56,383
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	3,702,505
6	Minimum investment return. Enter 5% of line 5	6	185,125

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	185,125
2a	Tax on investment income for 2016 from Part VI, line 5	2a	
b	Income tax for 2016 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	185,125
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	185,125
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	185,125

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	232,153
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	
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	232,153
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	232,153

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				185,125
2 Undistributed income, if any, as of the end of 2016:				
a Enter amount for 2015 only			95,286	
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2016:				
a From 2011				
b From 2012				
c From 2013				
d From 2014				
e From 2015				
f Total of lines 3a through e				
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ 232,153				
a Applied to 2015, but not more than line 2a			95,286	
b Applied to undistributed income of prior years (Election required – see instructions)				
c Treated as distributions out of corpus (Election required – see instructions)				
d Applied to 2016 distributable amount				136,867
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount – see instructions				
e Undistributed income for 2015 Subtract line 4a from line 2a Taxable amount – see instructions				
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2017				48,258
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required—see instructions)				
8 Excess distributions carryover from 2011 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9:				
a Excess from 2012				
b Excess from 2013				
c Excess from 2014				
d Excess from 2015				
e Excess from 2016				

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

<div>Recipient</div> <div>Name and address (home or business)</div>	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 8				150,770
Total			3a	150,770
b Approved for future payment N/A				
Total			3b	

Form 990-PF	Capital Gains and Losses for Tax on Investment Income	2016
For calendar year 2016, or tax year beginning _____, and ending _____		

Name SmartGo Foundation	Employer Identification Number 20-5290408
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(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.)
(1) MS #016392 LT	P	Various	Various
(2) MS #020238 ST	P	Various	Various
(3) MS #020238 LT	P	Various	Various
(4) MS #020239 ST	P	Various	Various
(5) MS #020239 LT	P	Various	Various
(6) MS #020245 ST	P	Various	Various
(7) MS #020245 ST NonCov	P	Various	Various
(8) MS #020246 ST	P	Various	Various
(9) MS #020246 LT	P	Various	Various
(10) MS #025764 ST	P	Various	Various
(11) MS #016394 ST	P	Various	Various
(12) MS #016394 LT	P	Various	Various
(13) MS #017240 ST	P	Various	Various
(14) UBS #835 ST	P	Various	Various
(15) UBS #835 LT	P	Various	Various

(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) 282,441		307,435	-24,994
(2) 52,556		57,038	-4,482
(3) 80,931		74,733	6,198
(4) 479,720		517,258	-37,538
(5) 167,444		136,131	31,313
(6) 75,491		77,511	-2,020
(7) 12,790		11,756	1,034
(8) 468,359		509,837	-41,478
(9) 171,680		179,656	-7,976
(10) 649,123		761,587	-112,464
(11) 274,476		287,445	-12,969
(12) 68,076		64,907	3,169
(13) 22,675		23,593	-918
(14) 92,810		90,854	1,956
(15) 62,947		49,108	13,839

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))
(1)			-24,994
(2)			-4,482
(3)			6,198
(4)			-37,538
(5)			31,313
(6)			-2,020
(7)			1,034
(8)			-41,478
(9)			-7,976
(10)			-112,464
(11)			-12,969
(12)			3,169
(13)			-918
(14)			1,956
(15)			13,839

Form 990-PF		Capital Gains and Losses for Tax on Investment Income		2016
For calendar year 2016, or tax year beginning		, and ending		
Name SmartGo Foundation			Employer Identification Number 20-5290408	
(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.)	
(1) UBS #834 ST	P	Various	Various	
(2) UBS #833 ST	P	Various	Various	
(3) UBS #833 LT	P	Various	Various	
(4) UBS #832 ST	P	Various	Various	
(5) UBS #832 LT	P	Various	Various	
(6) UBS #831 ST	P	Various	Various	
(7) UBS #829 ST	P	Various	Various	
(8) UBS #829 LT	P	Various	Various	
(9) UBS #828 ST	P	Various	Various	
(10) UBS #828 LT	P	Various	Various	
(11) UBS #827 ST	P	Various	Various	
(12) UBS #812 ST	P	Various	Various	
(13) UBS #812 LT	P	Various	Various	
(14)				
(15)				

(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) 111,512		102,432	9,080
(2) 94,204		96,256	-2,052
(3) 21,495		17,870	3,625
(4) 101,237		106,199	-4,962
(5) 23,937		16,404	7,533
(6) 136,362		123,160	13,202
(7) 76,028		73,511	2,517
(8) 45,093		38,608	6,485
(9) 653,421		650,898	2,523
(10) 49,738		44,436	5,302
(11) 287,319		278,615	8,704
(12) 741,627		732,274	9,353
(13) 172,306		174,151	-1,845
(14) 4,680			4,680
(15)			

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) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
(1)			9,080
(2)			-2,052
(3)			3,625
(4)			-4,962
(5)			7,533
(6)			13,202
(7)			2,517
(8)			6,485
(9)			2,523
(10)			5,302
(11)			8,704
(12)			9,353
(13)			-1,845
(14)			4,680
(15)			

Federal Statements

Statement 1 - Form 990-PF, Part I, Line 11 - Other Income

Description	Revenue per Books	Net Investment Income	Adjusted Net Income
AH Ptrs Trust, ML Alt Inv LLC	\$ -12,275	\$ -12,275	\$
Proshares VIX Mid-Term (Final	484	484	
PowerShares DB (Final)	-63	-63	
Total	\$ -11,854	\$ -11,854	\$ 0

Statement 2 - Form 990-PF, Part I, Line 16a - Legal Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Legal Fees	\$ 836	\$	\$	\$
Total	\$ 836	\$ 0	\$ 0	\$ 0

Statement 3 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Accounting fees	\$ 4,711	\$	\$	\$
Total	\$ 4,711	\$ 0	\$ 0	\$ 0

Statement 4 - Form 990-PF, Part I, Line 16c - Other Professional Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Investment Fees	\$ 31,475	\$ 31,475	\$	\$
Total	\$ 31,475	\$ 31,475	\$ 0	\$ 0

Federal Statements

Statement 5 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Foreign Taxes	\$ 314	314	\$	\$
Excise Taxes	16	16		
Payroll Tax Expense	7,229	1,446		5,783
Total	\$ 7,559	\$ 1,776	\$ 0	\$ 5,783

Statement 6 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
Morgan Stanley #025764	\$ 952,376	\$	Cost	\$
Morgan Stanley #020239	674,826		Cost	
Morgan Stanley #020238	249,072		Cost	
Morgan Stanley #016392	307,435		Cost	
Morgan Stanley #016394	266,390		Cost	
Morgan Stanley #017240	58,798		Cost	
Morgan Stanley #020245	47,274		Cost	
Morgan Stanley #020246	802,244		Cost	
UBS all accounts		2,853,025	Cost	2,898,014
Total	\$ 3,358,415	\$ 2,853,025		\$ 2,898,014

Federal Statements

Statement 7 - Form 990-PF, Part II, Line 13 - Other Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
Short Term Receivable	\$ 214		Cost	\$
Powershares DB US Dollar	16,783		Cost	
AH Ptrs Trust, ML Alt Inv LLC	40,998		Cost	
NH Credit Partners	84,507		Cost	
BX Tax Opps II	78,694		Cost	
TRG II Offshore	54,768		Cost	
Morgan Stanley #017241		200,613	Cost	269,361
Merrill Lynch #07077		3,800	Cost	3,800
Total	\$ 275,964	\$ 204,413		\$ 273,161

Statement 8 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year

Name	Address	Relationship	Status	Purpose	Amount
American Go Foundation	611 West End Avenue #9A				
New York NY 10024	Public Char.			To support organization	6,000
Camp Nor'wester	PO Box 1055				
Edmonds WA 98020	Public Char.			To support organization	10,000
Cathedral of the Madeleine	27 C Street				
Salt Lake City UT 84111	Public Char.			To support organization	1,000
Diocesan Development	27 C Street				
Salt Lake City UT 84103	Public Char.			To support organization	1,000
Doctors Without Borders	333 7th Avenue, 2nd Floor				
New York NY 10001	Public Char.			To support organization	3,000
Fourth Street Clinic	404 4th W				
Salt Lake City UT 84101	Public Char.			To support organization	3,000
Guide Dogs for the Blind	PO Box 3950				
San Rafael CA 94912	Public Char.			To support organization	5,000
Habitat For Humanity	121 Habitat Street				
Americus GA 31709	Public Char.			To support organization	3,000
JE Cosgriff Memorial Scho	2335 Redondo Avenue				
Salt Lake City UT 84108	Public Char.			To support organization	2,000

Federal Statements

Statement 8 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)

Name	Address	Relationship	Status	Purpose	Amount
Judge Memorial School	Salt Lake City UT 84102	650 S 1100 East	Public Char.	To support organization	10,000
KCPW - Public Radio	Salt Lake City UT 84151	PO Box 510730	Public Char.	To support organization	8,000
KUER FM 90 - Public Radio	Salt Lake City UT 84112	101 Wasatch Dr	Public Char.	To support organization	3,000
Madeleine Choir School	Salt Lake City UT 84103	205 First Avenue	Public Char.	To support organization	40,000
People Helping People	Salt Lake City UT 84103	205 N 400 W	Public Char.	To support organization	1,000
Planned Parenthood Assoc	Salt Lake City UT 84102	654 S 900 East	Public Char.	To support organization	20,000
Resolve	Salt Lake City UT 84102	1310 Broadway	Public Char.	To support organization	500
Somerville MA 02144	Salt Lake Education Foundation	440 E 100 S #118	Public Char.	To support organization	3,000
SL Jewish Community Center	Salt Lake City UT 84113	2 North Medical Dr	Public Char.	To support organization	1,000
St. Ambrose Church	Salt Lake City UT 84108	2315 Redondo Avenue	Public Char.	To support organization	1,000
StoryCorps	Brooklyn NY 11217	80 Hanson Place, 2nd Fl	Public Char.	To support organization	1,000
Wasatch Community Gardens	Salt Lake City UT 84111	340 E 400 South #204	Public Char.	To support organization	15,000
YWCA of Salt Lake City	Salt Lake City UT 84111	322 E 300 South	Public Char.	To support organization	3,000
App Camp For Girls	Portland OR 97214	4110 SE Hawthorne Blvd	Public Char.	To support organization	4,000
Best Friends Animal Society	Salt Lake City UT 84106	2005 South 1100 East	Public Char.	To support organization	1,000
Columbus Foundation	Salt Lake City UT 84115	3495 S. West Temple	Public Char.	To support organization	1,000
Common Good Press	Salt Lake City UT 84102	140 S McClelland St	Public Char.	To support organization	1,000

Federal Statements

Taxable Interest on Investments

Description	Amount	Unrelated Business Code	Exclusion Code	Postal Code	US Obs (\$ or %)
Interest Income	\$ 9,063		14		
Interest from Partnership K-1			14		
Total	\$ 9,063				

Tax-Exempt Dividends from Securities

Description	Amount	Unrelated Business Code	Exclusion Code	Postal Code	InState Muni (\$ or %)
Morgan Stanley #017240	\$ 247		14		
UBS	51		14		
Total	\$ 298				

Taxable Dividends from Securities

Description	Amount	Unrelated Business Code	Exclusion Code	Postal Code	US Obs (\$ or %)
Morgan Stanley #020238	\$ 1,541		14		
Morgan Stanley #020239	2,787		14		
Morgan Stanley #020246	97		14		
Morgan Stanley #016392	1,560		14		
Morgan Stanley #017240	603		14		
Morgan Stanley #025764	1,379		14		
UBS	38,328		14		
Total	\$ 46,295				

Other Investment Income

Description	Amount	Unrelated Business Code	Exclusion Code	Postal Code
AH Ptrs Trust, ML Alt Inv LLC	\$ -12,275		14	
Proshares VIX Mid-Term (Final	484		14	
PowerShares DB (Final)	-63		14	
Total	\$ -11,854			

EOY-Savings/Cash investments

<u>Description</u>	<u>Amount</u>
Merrill Lynch	\$ 6,900
Morgan Stanley #241	48,367
UBS all accounts	<u>422,690</u>
Total	<u>\$ 477,957</u>

Federal Statements

**Statement 8 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the
Year (continued)**

Name		Address		Relationship	Status	Purpose	Amount
DonorsChoose.org				134 West 37th St - 11 Fl			
New York NY 10018				Public Char. To support organization			2,270
USA Ultimate				5825 Delmonico Dr Ste 350			
Colorado Springs CO 80919				Public Char. To support organization			1,000
Total							<u>150,770</u>