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EXTENDED TO NOVEMBER 15, 2017

Return of Private Foundation

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

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OMB No 1545-0052

2016

Open to Public Inspection

Form 990-PF

Department of the Treasury
Internal Revenue Service

For calendar year 2016 or tax year beginning

, and ending

Name of foundation GOOD HEART WORK SMART FOUNDATION		A Employer identification number 20-5836042
Number and street (or P O box number if mail is not delivered to street address) 1010 LAKE STREET, SUITE 200	Room/suite	B Telephone number 708-725-3129
City or town, state or province, country, and ZIP or foreign postal code OAK PARK, IL 60301		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <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) <input type="checkbox"/> \$ 1,553,598. (Part I, column (d) must be on cash basis)	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))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received		1,130,000.			
2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities					
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10					
b Gross sales price for all assets on line 6a					
7 Capital gain net income (from Part IV, line 4)			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)					
11 Other income		65,230.	0.	65,230.	STATEMENT 1
12 Total Add lines 1 through 11		1,195,230.	0.	65,230.	
13 Compensation of officers, directors, trustees, etc		0.	0.	0.	0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees STMT 2		983.	0.	0.	0.
b Accounting fees					
c Other professional fees STMT 3		120,000.	0.	120,000.	0.
17 Interest					
18 Taxes					
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 4		26,059.	0.	0.	0.
24 Total operating and administrative expenses Add lines 13 through 23		147,042.	0.	120,000.	0.
25 Contributions, gifts, grants paid		1,113,797.			1,113,797.
26 Total expenses and disbursements Add lines 24 and 25		1,260,839.	0.	120,000.	1,113,797.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		-65,609.			
b Net investment income (if negative, enter -0-)			0.		
c Adjusted net income (if negative enter -0-)				0.	

625

13

Part II Balance Sheets		Beginning of year	End of year	
			(a) Book Value	(b) Book Value
Assets	1 Cash - non-interest-bearing	191,525.	58,456.	58,456.
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶ 18,281.			
	Less: allowance for doubtful accounts ▶	19,928.	18,281.	18,281.
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶ 10,000.			
	Less: allowance for doubtful accounts ▶ 0.	10,000.	10,000.	10,000.
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock			
	c Investments - corporate bonds			
Liabilities	11 Investments - land, buildings, and equipment basis ▶			
	Less: accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 5	1,130,565.	1,195,795.	1,195,795.
	14 Land, buildings, and equipment: basis ▶			
	Less: accumulated depreciation ▶			
	15 Other assets (describe ▶ STATEMENT 6)	271,066.	271,066.	271,066.
	16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	1,623,084.	1,553,598.	1,553,598.
	17 Accounts payable and accrued expenses	3,829.	1,683.	
	18 Grants payable			
Net Assets or Fund Balances	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶ SERENITY)	1,731.	0.	
	23 Total liabilities (add lines 17 through 22)	5,560.	1,683.	
	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>			
	and complete lines 24 through 26 and lines 30 and 31			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>			
	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	1,617,524.	1,551,915.	
	30 Total net assets or fund balances	1,617,524.	1,551,915.	
	31 Total liabilities and net assets/fund balances	1,623,084.	1,553,598.	

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,617,524.
2 Enter amount from Part I, line 27a	2	-65,609.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	1,551,915.
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	1,551,915.

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			
b	NONE		
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) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	<div> <div>If gain, also enter in Part I, line 7</div> <div>If (loss), enter -0- in Part I, line 7</div> </div>	2	
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). If (loss), enter -0- in Part I, line 8		3	

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2015	556,025.	0.	.000000
2014	372,134.	0.	.000000
2013	328,807.	0.	.000000
2012	509,364.	0.	.000000
2011	670,595.	0.	.000000

2 Total of line 1, column (d)	2	.000000
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	.000000
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	10,260.
5 Multiply line 4 by line 3	5	0.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	0.
7 Add lines 5 and 6	7	0.
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	1,113,797.

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)		1	0.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		2	0.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).		3	0.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
3 Add lines 1 and 2		5	0.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			
5 Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0-			
6 Credits/Payments:			
a 2016 estimated tax payments and 2015 overpayment credited to 2016	6a		
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		0.
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		0.
10 Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be: Credited to 2017 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	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
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
1c 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. \$ 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		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		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? If "Yes," attach the statement required by General Instruction T		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? If "Yes," complete Part II, col (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <u>IL</u>		
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	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)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		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 ► GOODHEARTWORKSMART.COM	X	
14 The books are in care of ► MARY JO SCHULER Telephone no. ► 708-725-3129 Located at ► 1010 LAKE STREET, SUITE 200, OAK PARK, IL ZIP+4 ► 60301		
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		N/A
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 type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A	
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 ►	<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. ►		
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

6b

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

X

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

7b

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

N/A

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.

(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
SEE STATEMENT 7		0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). 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 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 0.
b	Average of monthly cash balances	1b 10,416.
c	Fair market value of all other assets	1c
d	Total (add lines 1a, b, and c)	1d 10,416.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e 0.
2	Acquisition indebtedness applicable to line 1 assets	2 0.
3	Subtract line 2 from line 1d	3 10,416.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4 156.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5 10,260.
6	Minimum investment return. Enter 5% of line 5	6 513.

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	1 513.
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 0.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3 513.
4	Recoveries of amounts treated as qualifying distributions	4 0.
5	Add lines 3 and 4	5 513.
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	7 513.

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 1,113,797.
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 1,113,797.
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	5 0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6 1,113,797.

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				513.
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only			0.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2016:				
a From 2011	670,595.			
b From 2012	509,364.			
c From 2013	328,807.			
d From 2014	372,134.			
e From 2015	556,025.			
f Total of lines 3a through e	2,436,925.			
4 Qualifying distributions for 2016 from Part XII, line 4. ► \$ 1,113,797.				
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)	1,113,797.			
d Applied to 2016 distributable amount				0.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a).)	513.			513.
6 Enter the net total of each column as indicated below.	3,550,209.			
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
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 instr.			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	670,082.			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	2,880,127.			
10 Analysis of line 9.				
a Excess from 2012	509,364.			
b Excess from 2013	328,807.			
c Excess from 2014	372,134.			
d Excess from 2015	556,025.			
e Excess from 2016	1,113,797.			

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 ATTACHED STATMENT	NONE			1,113,797.
Total			3a	1,113,797.
b Approved for future payment				
NONE				
Total			3b	0.

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

▶ Attach to Form 990, Form 990-EZ, or Form 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

GOOD HEART WORK SMART FOUNDATION

20-5836042

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 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. Don't 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 isn't covered by the General Rule and/or the Special Rules doesn't 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 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2016)

Name of organization	Employer identification number
GOOD HEART WORK SMART FOUNDATION	20-5836042

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	STEPHEN & MARY JO SCHULER 315 N EUCLID AVENUE OAK PARK, IL 60302	\$ 1,130,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)

Employer identification number

20-5836042

Part II

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

Name of organization

Employer identification number

GOOD HEART WORK SMART FOUNDATION**20-5836042**

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 info. once) ▶ \$

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
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

2016 Good Heart Work Smart Donations		
Name	City State	Amount
19th Century Club	Oak Park, IL	\$ 1,500 00
19th Century Club	Oak Park, IL	\$ 1,500 00
		\$ 3,000 00
All in for Ethan	Riverside, IL	\$ 100 00
All in for Ethan	Riverside, IL	\$ 39 00
All in For Ethan	Riverside, IL	\$ 500 00
		\$ 639 00
Animal Care League	Oak Park, IL	\$ 167 82
Animal Care League	Oak Park, IL	\$ 1,000 00
Animal Care League	Oak Park, IL	\$ 1,000 00
		\$ 2,167 82
Ascension Catholic Church	Oak Park, IL	\$ 1,500 00
Ascension Catholic Church	Oak Park, IL	\$ 1,000 00
Ascension School	Oak Park, IL	\$ 1,000 00
Ascension School	Oak Park, IL	\$ 500 00
Ascension School	Oak Park, IL	\$ 500 00
		\$ 4,500 00
Autism Speaks	New York, NY	\$ 500 00
CAST	Oak Park, IL	\$ 3,255 82
Center for Speech & Language Disorder	Lombard, IL	\$ 1,000 00
Chicago Citizens for Change	Chicago, IL	\$ 350 00
Chicago Foundation for Women	Chicago, IL	\$ 1,000 00
Chicago Foundation for Women	Chicago, IL	\$ 3,000 00
Chicago Foundation for Women	Chicago, IL	\$ 1,000 00
		\$ 5,000 00
Chicago Tennis Patrons	Des Plaines, IL	\$ 1,000 00
Children's Clinic	Oak Park, IL	\$ 91 40
Children's Clinic	Oak Park, IL	\$ 75 00
Children's Clinic	Oak Park, IL	\$ 177 75
		\$ 344 15
Collaboration for Early Childhood Care	Oak Park, IL	\$ 2,000 00
Collaboration for Early Childhood Care	Oak Park, IL	\$ 1,000 00
		\$ 3,000 00
Community Foundation of Greater Flint	Flint, MI	\$ 10,000 00
CWS Crop Walk	Elkhart, IN	\$ 1,000 00
Dare County Association of Fire Officers	Nags Head, NC	\$ 300 00
Dominican University	River Forest, IL	\$ 1,000 00
Dominican University	River Forest, IL	\$ 2,000 00
Dominican University	River Forest, IL	\$ 1,500 00
Dominican University	River Forest, IL	\$ 10,000 00
Dominican University	River Forest, IL	\$ 50,000 00
		\$ 64,500 00
Friends of the OP Conservatory	Oak Park, IL	\$ 1,000 00
Friends of the OP Conservatory	Oak Park, IL	\$ 1,886 48
Friends of the OP Conservatory	Oak Park, IL	\$ 1,799 01
Friends of the OP Conservatory	Oak Park, IL	\$ 318 61
		\$ 5,004 10
Frank LLoyd Wright Preservation Trust	Chicago, IL	\$ 3,000 00
Friendly School of Folk Music	Berwyn, IL	\$ 1,500 00
Fuller Center for Housing	Americus, GA	\$ 1,000 00
Garden Club of Oak Park and River Forest	Oak Park, IL	\$ 250 00
Half Way Home Animal Rescue	Chicago, IL	\$ 500 00

2016 Good Heart Work Smart Donations		
Name	City State	Amount
Henry E Reid Memorial Scholarship Fund	Oak Park, IL	\$ 2,500 00
Henry E Reid Memorial Scholarship Fund	Oak Park, IL	\$ 1,000 00
		\$ 3,500 00
Hephzibah	Oak Park, IL	\$ 5,000 00
Hephzibah	Oak Park, IL	\$ 10,000 00
Hephzibah	Oak Park, IL	\$ 1,000 00
		\$ 16,000 00
Huskie Wrestling Family	Oak Park, IL	\$ 2,500 00
Huskie Wrestling Family	Oak Park, IL	\$ 1,500 00
Huskie Wrestling Family	Oak Park, IL	\$ 1,000 00
		\$ 5,000 00
IL/USAW	Colorodo Springs, CO	\$ 1,000 00
Infant Welfare Society	Oak Park, IL	\$ 2,000 00
Infant Welfare Society	Oak Park, IL	\$ 3,000 00
Infant Welfare Society	Oak Park, IL	\$ 1,000 00
Infant Welfare Society	Oak Park, IL	\$ 5,000 00
Infant Welfare Society	Oak Park, IL	\$ 750 00
		\$ 11,750 00
Irving School	Oak Park, IL	\$ 100 00
Johns Hopkins University	Baltimore, MD	\$ 250,000 00
Johns Hopkins University	Baltimore, MD	\$ 1,000 00
		\$ 251,000 00
Lauren Kiefer Memorial Foundation	Villa Park, IL	\$ 1,500 00
Longfellow Carnival	Oak Park, IL	\$ 69 63
Longfellow Carnival	Oak Park, IL	\$ 100 00
Longfellow Elementary School PTO	Oak Park, IL	\$ 500 00
Longfellow Elementary School PTO	Oak Park, IL	\$ 500 00
		\$ 1,169 63
Loyola Hospital	Maywood Park, IL	\$ 5,000 00
Misericordia	Chicago, IL	\$ 1,000 00
Misericordia	Chicago, IL	\$ 100 00
Misericordia	Chicago, IL	\$ 1,200 00
Misericordia	Chicago, IL	\$ 500 00
Misericordia	Chicago, IL	\$ 500 00
Misericordia	Chicago, IL	\$ 500 00
		\$ 3,800 00
New Foundation of Hope	Chicago, IL	\$ 300 00
New Foundation of Hope	Chicago, IL	\$ 500 00
		\$ 800 00
New Hope	Chicago, IL	\$ 1,000 00
Northwestern Memorial Hospital	Chicago, IL	\$ 1,500 00
Nursery Dept of Baptist Medical Center	Jackson, MS	\$ 1,000 00
Oak Leyden Developmental Svcs	Oak Park, IL	\$ 500 00
Oak Park Area Arts Council	Oak Park, IL	\$ 1,000 00
Oak Park Education Foundation	Oak Park, IL	\$ 200,000 00
Oak Park Education Foundation	Oak Park, IL	\$ 5,000 00
Oak Park Education Foundation	Oak Park, IL	\$ 585 28
Oak Park Education Foundation	Oak Park, IL	\$ 181 05
		\$ 205,766 33
Oak Park Regional Housing Center	Oak Park, IL	\$ 1,500 00
Oak Park Regional Housing Center	Oak Park, IL	\$ 5,000 00
Oak Park Regional Housing Center	Oak Park, IL	\$ 2,286 14

2016 Good Heart Work Smart Donations		
Name	City State	Amount
		\$ 8,786 14
Opportunity Knocks	River Forest, IL	\$ 1,000 00
Opportunity Knocks	River Forest, IL	\$ 167 82
Opportunity Knocks	River Forest, IL	\$ 1,000 00
Opportunity Knocks	River Forest, IL	\$ 2,500 00
		\$ 4,667 82
OPRF Athletic Booster Club	River Forest, IL	\$ 5,000 00
OPRF Athletic Booster Club	Oak Park, IL	\$ 226 57
OPRF Athletic Booster Club	Oak Park, IL	\$ 320 00
		\$ 5,546 57
OPRF Community Foundation	Oak Park, IL	\$ 2,000 00
OPRF Community Foundation	Oak Park, IL	\$ 4,271 20
OPRF Community Foundation	Oak Park, IL	\$ 10,000 00
OPRF Community Foundation	Oak Park, IL	\$ 1,000 00
OPRF Community Foundation	Oak Park, IL	\$ 50,000 00
OPRF Community Foundation	Oak Park, IL	\$ 45 10
OPRF Community Foundation	Oak Park, IL	\$ 618 20
OPRF Community Foundation	Oak Park, IL	\$ 750 00
OPRF Community Foundation	Oak Park, IL	\$ 292 13
OPRF Community Foundation	Oak Park, IL	\$ 583 00
OPRF Community Foundation	Oak Park, IL	\$ 317 36
		\$ 69,876 99
OPRF Food Pantry	Oak Park, IL	\$ 2,000 00
OPRF Infant Welfare Society	Oak Park, IL	\$ 10,000 00
OPRFHS	Oak Park, IL	\$ 1,600 00
OPRFHS - Girls Basketball Program	Oak Park, IL	\$ 1,500 00
OPRFHS - Best Buddies	Oak Park, IL	\$ 1,000 00
OPRFHS - Field Hockey	Oak Park, IL	\$ 1,100 00
OPRFHS - Field Hockey	Oak Park, IL	\$ 220 00
OPRFHS - Football	Oak Park, IL	\$ 3,000 00
OPRFHS - Football	Oak Park, IL	\$ 133 00
OPRFHS - LaCrosse	Oak Park, IL	\$ 5,000 00
OPRFHS - LaCrosse	Oak Park, IL	\$ 75 00
OPRFHS - LaCrosse	Oak Park, IL	\$ 91 40
OPRFHS - Track	Oak Park, IL	\$ 1,000 00
OPRFHS -Field Hockey	Oak Park, IL	\$ 5,000 00
OPRFHS Alumni Association	Oak Park, IL	\$ 2,500 00
OPRFHS Operation Snowball	Oak Park, IL	\$ 1,000 00
OPRFHS Scholarship Foundation	Oak Park, IL	\$ 2,000 00
OPRFHS Scholarship Foundation	Oak Park, IL	\$ 2,500 00
		\$ 27,719 40
OPTC	River Forest, IL	\$ 167 82
P A C T T	Chicago, IL	\$ 500 00
PACTT Learning Center	Chicago, IL	\$ 300 00
		\$ 800 00
Parenthesis	Oak Park, IL	\$ 2,000 00
Pleasant Home Foundation	Oak Park, IL	\$ 5,000 00
pro musica youth chorus	Oak Park, IL	\$ 2,500 00
Rotary Club of Oak Park-River Forest	Oak Park, IL	\$ 1,000 00
Rush University Medical Center	Chicago, IL	\$ 1,000 00
Salk Institute for Biological Studies	LaJolla, CA	\$ 10,000 00
Salk Institute for Biological Studies	LaJolla, CA	\$ 250,000 00
		\$ 260,000 00

2016 Good Heart Work Smart Donations		
Name	City State	Amount
Sarah's Inn	Oak Park, IL	\$ 300 00
Sarah's Inn	Oak Park, IL	\$ 5,000 00
Sarah's Inn	Oak Park, IL	\$ 1,000 00
		\$ 6,300 00
Senior Citizens Center of OPRF	Oak Park, IL	\$ 250 00
Seven Generations Ahead	Oak Park, IL	\$ 3,000 00
St Vincent Ferrer School	River Forest, IL	\$ 1,000 00
Tasis Foundation, INC	Alexandria, VA	\$ 1,000 00
The Catalyst School	Chicago, IL	\$ 10,000 00
The Common Pantry	Chicago, IL	\$ 300 00
The Day Nursery	Oak Park, IL	\$ 500 00
The Music School	Oak Lawn, IL	\$ 500 00
The Music School	Oak Lawn, IL	\$ 500 00
		\$ 1,000 00
Thrive	Oak Park, IL	\$ 1,000 00
Thrive	Oak Park, IL	\$ 1,500 00
		\$ 2,500 00
Triton College Foundation	River Grove, IL	\$ 2,500 00
Unity Church of Oak Park	Oak Park, IL	\$ 500 00
VCP Seguin of Greater Chicago	Cicero, IL	\$ 1,000 00
Vocel	Chicago, IL	\$ 1,500 00
Vocel	Chicago, IL	\$ 500 00
		\$ 2,000 00
Vote org	San Francisco, CA	\$ 25,000 00
Vote org	San Francisco, CA	\$ 25,000 00
		\$ 50,000 00
Walk 4 Hearing	Bethesda, MD	\$ 1,000 00
West Cook YMCA	Oak Park, IL	\$ 2,500 00
Westchester Chargers	Westchester, IL	\$ 500 00
Wonder Works	Oak Park, IL	\$ 500 00
WSSRA	Franklin Park, IL	\$ 1,000 00
WSSRA	Franklin Park, IL	\$ 1,000 00
WSSRA	Franklin Park, IL	\$ 1,000 00
WSSRA	Franklin Park, IL	\$ 185 83
		\$ 3,185 83
		\$ 1,113,797 42

FORM 990-PF	OTHER INCOME	STATEMENT	1
DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
FROM GREENLINE WHEELS, L3C - DISREGARDED ENTITY	65,230.	0.	65,230.
TOTAL TO FORM 990-PF, PART I, LINE 11	65,230.	0.	65,230.

FORM 990-PF	LEGAL FEES			STATEMENT	2
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
LEGAL FEES	983.	0.	0.	0.	
TO FM 990-PF, PG 1, LN 16A	983.	0.	0.	0.	

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT	3
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
PROFESSIONAL FEES	120,000.	0.	120,000.	0.	
TO FORM 990-PF, PG 1, LN 16C	120,000.	0.	120,000.	0.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
DUES AND SUBSCRIPTIONS	15.	0.	0.	0.	
OTHER MISCELLANEOUS EXPENSES	815.	0.	0.	0.	
PROPERTY TAXES	19,540.	0.	0.	0.	
INSURANCE EXPENSE	5,689.	0.	0.	0.	
TO FORM 990-PF, PG 1, LN 23	26,059.	0.	0.	0.	

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	5
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
GREENLINE WHEELS, L3C	COST	1,195,795.	1,195,795.
TOTAL TO FORM 990-PF, PART II, LINE 13		1,195,795.	1,195,795.

FORM 990-PF	OTHER ASSETS	STATEMENT	6
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DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
COMMERCIAL SPACE FROM GREENLINE WHEELS	271,066.	271,066.	271,066.
TO FORM 990-PF, PART II, LINE 15	271,066.	271,066.	271,066.

FORM 990-PF PART VIII - LIST OF OFFICERS, DIRECTORS STATEMENT 7
 TRUSTEES AND FOUNDATION MANAGERS

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN	EXPENSE CONTRIB ACCOUNT
MARY JO SCHULER 315 N EUCLID AVENUE OAK PARK, IL 60302	OFFICER 10.00	0.	0.	0.
STEPHEN G. SCHULER 315 N EUCLID AVENUE OAK PARK, IL 60302	OFFICER 1.00	0.	0.	0.
SUSAN MIKA 330 S. LOMBARD AVENUE LOMBARD, IL 60148	OFFICER 10.00	0.	0.	0.
STACY WETTSTEIN 1235 ASHLAND AVENUE RIVER FOREST, IL 60305	OFFICER 1.00	0.	0.	0.
MELVIN F. PHILLIPS JR. 1211 W. CERMAK ROAD BROADVIEW, IL 60155	OFFICER 1.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		0.	0.	0.

FORM 990-PF PART XV - LINE 1A STATEMENT 8
 LIST OF FOUNDATION MANAGERS

NAME OF MANAGER

MARY JO SCHULER
STEPHEN G. SCHULER