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

Name of foundation LUTRON FOUNDATION		A Employer identification number 23-2322928	
Number and street (or P.O. box number if mail is not delivered to street address) 1506 PLEASANT VIEW ROAD		Room/suite	B Telephone number (see instructions) (610) 282-3800
City or town, state or province, country, and ZIP or foreign postal code COOPERSBURG, PA 18036		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) \$ 5,307,310	J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> 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 <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)	700,000			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	10	10		
	4 Dividends and interest from securities . . .	118,448	112,416		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	88,286			
	b Gross sales price for all assets on line 6a 2,656,031				
	7 Capital gain net income (from Part IV, line 2) . . .		88,286		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances _____				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	906,744	200,712		
	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)	4,400	0		0
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	9,155	569		0
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	26,353	26,338		0
	24 Total operating and administrative expenses. Add lines 13 through 23	39,908	26,907		0
	25 Contributions, gifts, grants paid	700,527			700,527
	26 Total expenses and disbursements. Add lines 24 and 25	740,435	26,907		700,527
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	166,309			
	b Net investment income (if negative, enter -0-)		173,805		
	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	194,736	234,767	234,767
	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)	324,858	298,375	280,620
	b	Investments—corporate stock (attach schedule)	2,902,682	3,035,249	3,514,376
	c	Investments—corporate bonds (attach schedule)	1,020,922	1,023,896	971,131
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	306,171	323,391	306,416
	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)	4,749,369	4,915,678	5,307,310	
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 ▶ <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	4,749,369	4,915,678	
	28	Paid-in or capital surplus, or land, bldg, and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	0	0	
	30	Total net assets or fund balances (see instructions)	4,749,369	4,915,678	
31	Total liabilities and net assets/fund balances (see instructions) .	4,749,369	4,915,678		

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	4,749,369
2	Enter amount from Part I, line 27a	2	166,309
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	4,915,678
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	4,915,678

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)
1 a PUBLICLY TRADED SECURITIES	P		
b CAPITAL GAINS DIVIDENDS	P		
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 2,642,102		2,567,745	74,357
b 13,929			13,929
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			74,357
b			13,929
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	88,286
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	693,032	5,076,890	0 136507
2014	702,393	4,858,545	0 144569
2013	723,451	4,290,496	0 168617
2012	732,775	3,756,000	0 195095
2011	584,090	3,627,097	0 161035

2 Total of line 1, column (d)	2	0 805823
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 161165
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	5,052,869
5 Multiply line 4 by line 3	5	814,346
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,738
7 Add lines 5 and 6	7	816,084
8 Enter qualifying distributions from Part XII, line 4	8	700,527

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	1	3,476
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	3,476
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	3,476
6	Credits/Payments		
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a	4,400
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	4,400
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	924
11	Enter the amount of line 10 to be Credited to 2017 estimated tax ▶ 924 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)? <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>	1b	No
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 ▶ \$ _____ (2) On foundation managers ▶ \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities</i>	2	No
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>	3	No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	No
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T</i>	5	No
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ PA _____		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation</i> .	8b	Yes
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>	9	No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	10	No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	Yes	
14	The books are in care of ► JOHN R WOODMAN Telephone no ► (610) 282-3800			

Located at **►** 1506 PLEASANT VIEW ROAD COOPERSBURG PA ZIP+4 **►** 18036

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year ► 15			
16	At any time during calendar year 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 instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR). If "Yes," enter the name of the foreign country ►	16	Yes	No

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

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

1a	During the year did the foundation (either directly or indirectly)		Yes	No
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here. ► <input type="checkbox"/>	1b		
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2016? <input type="checkbox"/>	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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ► 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions). <input type="checkbox"/>	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If "Yes," did it have excess business holdings in 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). <input type="checkbox"/>	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))? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (3) Provide a grant to an individual for travel, study, or other similar purposes? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No b 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No Organizations relying on a current notice regarding disaster assistance check here. ▶ <input type="checkbox"/> 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? <input type="checkbox"/> Yes <input type="checkbox"/> No If "Yes," attach the statement required by Regulations section 53.4945–5(d)	5b		
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes" to 6b, file Form 8870	6b		No
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	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	Expense account, (e) other allowances
SUSAN S HAKKARAINEN 1506 PLEASANT VIEW ROAD COOPERSBURG, PA 18036	PRESIDENT & DIRECTOR 0 00	0	0	0
MICHAEL W PESSINA 1506 PLEASANT VIEW ROAD COOPERSBURG, PA 18036	EXECUTIVE VICE PRESIDENT & DIRECTOR 0 00	0	0	0
WALTER S PEAKE 1506 PLEASANT VIEW ROAD COOPERSBURG, PA 18036	SECRETARY & TREASURER 0 00	0	0	0
JOHN R WOODMAN 1506 PLEASANT VIEW ROAD COOPERSBURG, PA 18036	ASST. SECRETARY & ASST. TREASURER 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	Expense account, (e) 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	4,838,717
b	Average of monthly cash balances.	1b	291,099
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	5,129,816
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	5,129,816
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	76,947
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	5,052,869
6	Minimum investment return. Enter 5% of line 5.	6	252,643

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	252,643
2a	Tax on investment income for 2016 from Part VI, line 5.	2a	3,476
b	Income tax for 2016 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	3,476
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	249,167
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	249,167
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	249,167

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	700,527
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	700,527
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	700,527

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				249,167
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.	406,724			
b	From 2012.	547,115			
c	From 2013.	516,690			
d	From 2014.	468,058			
e	From 2015.	443,373			
f	Total of lines 3a through e.	2,381,960			
4	Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ 700,527				
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.				249,167
e	Remaining amount distributed out of corpus	451,360			
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	2,833,320			
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) . . .	406,724			
9	Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	2,426,596			
10	Analysis of line 9				
a	Excess from 2012. . . .	547,115			
b	Excess from 2013. . . .	516,690			
c	Excess from 2014. . . .	468,058			
d	Excess from 2015. . . .	443,373			
e	Excess from 2016. . . .	451,360			

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))

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	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> See Additional Data Table				
Total			3a	700,527
b <i>Approved for future payment</i>				
Total			3b	0

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments.					
3 Interest on savings and temporary cash investments			14	10	
4 Dividends and interest from securities.			14	118,448	
5 Net rental income or (loss) from real estate					
a Debt-financed property.					
b Not debt-financed property.					
6 Net rental income or (loss) from personal property					
7 Other investment income.					
8 Gain or (loss) from sales of assets other than inventory			18	88,286	
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		206,744	0
13 Total. Add line 12, columns (b), (d), and (e).			13		206,744

(See worksheet in line 13 instructions to verify calculations)

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

[illegible]

Part XVII

- | | Yes | No |
|-------|-----|----|
| 1a(1) | | No |
| 1a(2) | | No |
| 1b(1) | | No |
| 1b(2) | | No |
| 1b(3) | | No |
| 1b(4) | | No |
| 1b(5) | | No |
| 1b(6) | | No |
| 1c | | No |

[illegible]

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

- b** If "Yes," complete the following schedule

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

**Sign
Here**

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

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

**Paid
Preparer
Use Only**

Print/Type preparer's name MICHELLE MALIMBAN	Preparer's Signature	Date	Check if self-employed <input type="checkbox"/>	PTIN P01372721
Firm's name ▶ RSM US LLP				Firm's EIN ▶ 42-0714325
Firm's address ▶ 751 ARBOR WAY SUITE 200 BLUE BELL, PA 19422				Phone no (215) 641-8600

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
ALBURTIS 5K FUN RUN-WALK (AA CC) 427 LAUREN DRIVE ALBURTIS, PA 18011		PC	UNRESTRICTED	500
ALBURTIS FIRE DEPARTMENT 328 SOUTH MAIN STREET ALBURTIS, PA 18011		PC	UNRESTRICTED	1,000
ALLENTOWN CITY OF PARKS RECREATION 3000 PARKWAY BLVD ALLENTOWN, PA 18104		PC	UNRESTRICTED	2,500
ALLENTOWN ART MUSEUM 31 NORTH 5TH STREET ALLENTOWN, PA 18101		PC	UNRESTRICTED	6,500
ALLENTOWN RESCUE MISSION 355 WEST HAMILTON STREET ALLENTOWN, PA 18105		PC	UNRESTRICTED	2,000
ALLENTOWN SCHOOL DISTRICT FOUNDATION PO BOX 328 ALLENTOWN, PA 18105		PC	UNRESTRICTED	1,500
ALLENTOWN SYMPHONY ASSOCIATION 23 NORTH SIXTH STREET ALLENTOWN, PA 18101		PC	UNRESTRICTED	4,500
ALLIANCE HALL OF ALLENTOWN 245 NORTH 6TH STREET ALLENTOWN, PA 18102		PC	UNRESTRICTED	500
AMERICAN HEART ASSOCIATION 968 POSTAL ROAD SUITE 110 ALLENTOWN, PA 18104		PC	UNRESTRICTED	5,000
AMERICAN RED CROSS LEHIGH VALLEY CHAPTER 3939 BROADWAY ST ALLENTOWN, PA 18104		PC	UNRESTRICTED	9,472
ARTQUEST (FORMERLY BETHLEHEM MUSIKFEST ASSOCIATION) 25 WEST 3RD STREET SUITE 300 BETHLEHEM, PA 18015		PC	UNRESTRICTED	4,312
BACH CHOIR OF BETHLEHEM (THE) 123 HECKEWELDER PLACE BETHLEHEM, PA 18018		PC	UNRESTRICTED	2,000
BAUM SCHOOL OF ART 510 LINDEN STREET ALLENTOWN, PA 18105		PC	UNRESTRICTED	4,400
BURN PREVENTION FOUNDATION 5000 TILGHMAN STREET ALLENTOWN, PA 18104		PC	UNRESTRICTED	1,000
CARNEGIE MELLON UNIVERSITY - SPIRA AWARD PO BOX 815 PITTSBURGH, PA 152309873		PC	UNRESTRICTED	4,000
Total ►				700,527
3a				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
COMMUNITY BIKE WORKS 235 N MADISON STREET ALLENTOWN, PA 18102		PC	UNRESTRICTED	1,000
CONCORD CHAMBER SINGERS PO BOX 423 BETHLEHEM, PA 180160423		PC	UNRESTRICTED	100
COOPERSBURG FIRE DEPARTMENT 13 S MAIN STREET COOPERSBURG, PA 18036		PC	UNRESTRICTED	1,500
COOPERSBURG HALLOWEEN PARADE C/O JOHN E MARSHALL 3927 STATE ROAD COOPERSBURG, PA 18036		PC	UNRESTRICTED	1,000
COOPERSBURG HISTORICAL SOCIETY C/O KEN MOHR 116 SOUTH MAIN COOPERSBURG, PA 18036		PC	UNRESTRICTED	1,000
COOPERSBURG POLICE DEPARTMENT 5 NORTH MAIN STREET COOPERSBURG, PA 18036		PC	UNRESTRICTED	1,500
CORNELL - SCHOOL OF EE - TEACHING AWARD 224 PHILLIPS HALL ITHACA, NY 148535401		PC	UNRESTRICTED	2,000
CORNELL ECE TEACHING AWARD 224 PHILLIPS HALL ITHACA, NY 148535401		PC	UNRESTRICTED	2,000
CYBERSONICS TECHNOLOGY TEAM 35 CHURCH HILL ROAD KINTNERSVILLE, PA 18930		PC	UNRESTRICTED	3,500
DAVINCI DISCOVERY CENTER (FORMERLY DISCOVER CENTER OF SCIENCE & TECHNOLOGY) 3145 HAMILTON BLVD BYPASS ALLENTOWN, PA 18103		PC	UNRESTRICTED	9,080
DESALES UNIVERSITY 2755 STATION AVENUE CENTER VALLEY, PA 180349987		PC	UNRESTRICTED	8,800
EISENHOWER EXCHANGE FELLOWSHIPS 250 SOUTH 16TH STREET PHILADELPHIA, PA 19102		PC	UNRESTRICTED	50,000
ELECTRI INTERNATIONAL FOUNDATION 3 BETHESDA METRO CENTER STE 1100 BETHESDA, MD 20814		PC	UNRESTRICTED	10,000
ELECTRICAL SAFETY FOUNDATION INTERNATIONAL 1300 NORTH 17TH STREET SUITE 1847 ROSSLYN, VA 22209		PC	UNRESTRICTED	5,000
EMMAUS HIGH SCHOOL ROBOTICS CLUB 500 MACUNGIE AVENUE EMMAUS, PA 18049		PC	UNRESTRICTED	3,500
Total ►				700,527
3a				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
FOX CHASE CANCER CENTER 33 COTTMAN AVENUE PHILADELPHIA, PA 19111		PC	UNRESTRICTED	39,100
FRATERNAL ORDER OF POLICE - PLANTATION FL FOP 42 7360 NW 5TH STREET PLANTATION, FL 33317		PC	UNRESTRICTED	1,500
FRATERNAL ORDER OF POLICE - PLANTATION LODGE #42 PO BOX 15520 PLANTATION, FL 33318		PC	UNRESTRICTED	1,500
FRIENDS OF GOVERNORS ISLAND 55 EXCHANGE PLACE NEW YORK, NY 10005		PC	UNRESTRICTED	4,400
GIRL SCOUTS OF EASTERN PA PO BOX 309 LAFAYETTE HILL, PA 194440309		PC	UNRESTRICTED	20,000
GOOD SHEPHERD CELEBRITY CLASSIC 850 5TH STREET ALLENTOWN, PA 18103		PC	UNRESTRICTED	1,575
GOOD SHEPHERD 850 5TH STREET ALLENTOWN, PA 18103		PC	UNRESTRICTED	13,300
HANOVER COUNTY HANOVER COUNTY DEPART OF ECONOMIC DEVELOP 9097 ALTEE STATION RD STE 3 MECHANICSVILLE, VA 23116		PC	UNRESTRICTED	2,000
HELEN KELLER INTERNATIONAL 352 PARK AVENUE SOUTH 12TH FLOOR NEW YORK, NY 10010		PC	UNRESTRICTED	100
HISPANIC AMERICAN ORGANIZATION 462 WEST WALNUT STREET ALLENTOWN, PA 18102		PC	UNRESTRICTED	1,000
LCCC FOUNDATION 4525 EDUCATION PARK DRIVE SCHNECKSVILLE, PA 18078		PC	UNRESTRICTED	1,000
LEHIGH UNIVERSITY - SPIRA AWARD COLLEGE OF ENGINEERING APPLIED SCIENCE 19 MEMORIAL DRIVE WEST BETHLEHEM, PA 18015		PC	UNRESTRICTED	4,000
LEHIGH UNIVERSITY - SPIRA AWARD - COMPUTER 19 MEMORIAL DR WEST BETHLEHEM, PA 180153085		PC	UNRESTRICTED	2,000
LEHIGH UNIVERSITY - ZOELLNER ARTS CENTER ALUMNI MEMORIAL BUILDING 27 MEMORIAL DRIVE WEST BETHLEHEM, PA 18015		PC	UNRESTRICTED	19,920
LEHIGH VALLEY HOSPITAL AND HEALTH NETWORK 2100 MACK BLVD ALLENTOWN, PA 18105		PC	UNRESTRICTED	94,100
Total ▶ 3a				700,527

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
LEHIGH VALLEY PBS PBS 39 WLVT-TV 839 SESAME STREET BETHLEHEM, PA 18015		PC	UNRESTRICTED	10,000
LOWER MACUNGIE FIRE DEPARTMENT PO BOX 3002 WESCOSVILLE, PA 18106		PC	UNRESTRICTED	1,000
MACUNGIE AMBULANCE CORPS 5550 N WALNUT STREET MACUNGIE, PA 18062		PC	UNRESTRICTED	1,000
MANUFACTURERS RESOURCE CENTER 961 MARCON BLVD SUITE 200 ALLENTOWN, PA 18109		PC	UNRESTRICTED	1,000
MILLER-KEYSTONE BLOOD CENTER LEHIGH VALLEY CORPORATE CENTER 1465 VALLEY CENTER PKWY BETHLEHEM, PA 18017		PC	UNRESTRICTED	2,000
MINSI TRAILS BSA - LEHIGH LEADERSHIP PO BOX 20624 LEHIGH VALLEY, PA 18002		PC	UNRESTRICTED	6,000
MINSI TRAILS COUNCIL PO BOX 20624 LEHIGH VALLEY, PA 18002		PC	UNRESTRICTED	10,000
NAED EDUCATION & RESEARCH FOUNDATION PO BOX 843703 KANSAS CITY, MO 63184		PC	UNRESTRICTED	10,000
NEW VENTURE FUND (BUILDING 21 ALLENTOWN) 1201 CONNECTICUT AVENUE NW WASHINGTON, DC 20036		PC	UNRESTRICTED	15,000
NORTHAMPTON COMMUNITY COLLEGE FOUNDATION 4525 EDUCATION PARK DRIVE SCHNECKSVILLE, PA 18078		PC	UNRESTRICTED	1,000
NUCKOLLS FUND FOR LIGHTING EDUCATION 12 MILL POND ROAD PUTNAM VALLEY, NY 10579		PC	UNRESTRICTED	1,000
PENN STATE UNIVERSITY ONE OLD MAIN UNIVERSITY PARK, PA 16802		PC	UNRESTRICTED	30,000
PENN STATE UNIVERSITY - SPIRA TEACHING AWARD 104 ENGINEERING A BUILDING UNIVERSITY PARK, PA 16802		PC	UNRESTRICTED	4,000
PENNSYLVANIA ENGINEERING FUND FOR PSPE PA SOCIETY OF PROFESSIONAL ENGINEERS PO BOX 3441 ALLENTOWN, PA 18106		PC	UNRESTRICTED	2,000
PENNSYLVANIA SHAKESPEARE FESTIVAL DESALES UNIVERSITY 2755 STATION AVENUE CENTER VALLEY, PA 180349568		PC	UNRESTRICTED	4,285
Total ►				700,527
3a				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
PENNSYLVANIA SINFONIA ORCHESTRA 1524 WEST LINDEN STREET ALLENTOWN, PA 18102		PC	UNRESTRICTED	1,000
DAVID M PETZOLD MEMORIAL FOUNDATION PO BOX 223 CENTER VALLEY, PA 18034		PC	UNRESTRICTED	776
PRATT INSTITUTE 200 WILLOUGHBY AVENUE BROOKLYN, NY 11205		PC	UNRESTRICTED	14,130
ROCHESTER ROTARY CHARITIES PO BOX 815823 ROCHESTER, MI 483071523		PC	UNRESTRICTED	250
ROPER TIM SCHOLARSHIP FUND 164 EAST 1ST STREET WIND GAP, PA 18091		PC	UNRESTRICTED	250
SACRED HEART HOSPITAL 421 CHEW STREET ALLENTOWN, PA 18102		PC	UNRESTRICTED	15,000
SKILLS USA COUNCIL 555 UNION BLVD ALLENTOWN, PA 18103		PC	UNRESTRICTED	500
SKILLS USA COUNCIL 1601 UNION BLVD ALLENTOWN, PA 18103		PC	UNRESTRICTED	1,340
SOCIETY OF WOMEN ENGINEERS (SWE) LEHIGH VALLEY SECTION 1722 CREEK VIEW DRIVE FOGELSVILLE, PA 18051		PC	UNRESTRICTED	3,000
SOUTHERN LEHIGH PUBLIC LIBRARY 3200 PRESTON LANE CENTER VALLEY, PA 18034		PC	UNRESTRICTED	2,500
SOUTHERN LEHIGH SCHOOL DISTRICT 5775 MAIN STREET CENTER VALLEY, PA 18034		PC	UNRESTRICTED	800
ST JOHN'S COMMUNITY OUTREACH BENEFIT 538 E THOMAS STREET COOPERSBURG, PA 18036		PC	UNRESTRICTED	500
ST LUKE'S HEALTH NETWORK 801 OSTRUM STREET BETHLEHEM, PA 18015		PC	UNRESTRICTED	42,500
ST LUKE'S CHARITY BALL 801 OSTRUM STREET BETHLEHEM, PA 18015		PC	UNRESTRICTED	6,380
STATE THEATRE CENTER FOR THE ARTS INC 453 NORTHAMPTON STREET EASTON, PA 18042		PC	UNRESTRICTED	14,698
Total ►				700,527
3a				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
TXLR 1522 1/2 CHEW STREET ALLENTOWN, PA 18102		PC	UNRESTRICTED	380
UNITED WAY OF GREATER LEHIGH VALLEY 1110 AMERICAN PARKWAY NE ALLENTOWN, PA 18109		PC	UNRESTRICTED	114,079
UNIVERSITY OF PENNSYLVANIA - TRUSTEES 102 MEYERSON HALL 210 SOUTH 34 STREET PHILADELPHIA, PA 19104		PC	UNRESTRICTED	10,000
UPPER SAUCON AMBULANCE 5560 CAMP MEETING ROAD CENTER VALLEY, PA 18034		PC	UNRESTRICTED	2,500
UPPER SAUCON VOLUNTEER FIRE CO 4445 WEST HOPEWELL ROAD CENTER VALLEY, PA 18034		PC	UNRESTRICTED	2,500
USO PO BOX 96860 WASHINGTON, DC 20077		PC	UNRESTRICTED	1,000
VALLEY YOUTH HOUSE 827-829 LINDEN STREET ALLENTOWN, PA 18101		PC	UNRESTRICTED	5,000
VIA OF THE LEHIGH VALLEY 336 W SPRUCE STREET BETHLEHEM, PA 18018		PC	UNRESTRICTED	1,000
WOLFSONIAN - FIU (THE) 1001 WASHINGTON AVENUE MIAMI BEACH, FL 33139		PC	UNRESTRICTED	7,500
Total ▶ 3a				700,527

TY 2016 Accounting Fees Schedule**Name:** LUTRON FOUNDATION**EIN:** 23-2322928

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	4,400	0		0

TY 2016 Investments Corporate Bonds Schedule**Name:** LUTRON FOUNDATION**EIN:** 23-2322928

Name of Bond	End of Year Book Value	End of Year Fair Market Value
GLENMEDE	1,023,896	971,131

TY 2016 Investments Corporate Stock Schedule

Name: LUTRON FOUNDATION

EIN: 23-2322928

Name of Stock	End of Year Book Value	End of Year Fair Market Value
GLENMEDE	3,035,249	3,514,376

TY 2016 Investments Government Obligations Schedule**Name:** LUTRON FOUNDATION**EIN:** 23-2322928**US Government Securities - End
of Year Book Value:**

298,375

**US Government Securities - End
of Year Fair Market Value:**

280,620

**State & Local Government
Securities - End of Year Book
Value:**

0

**State & Local Government
Securities - End of Year Fair
Market Value:**

0

TY 2016 Investments - Other Schedule

Name: LUTRON FOUNDATION

EIN: 23-2322928

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
GLENMEDE	AT COST	323,391	306,416

TY 2016 Other Expenses Schedule**Name:** LUTRON FOUNDATION**EIN:** 23-2322928**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CUSTODIAN & MANAGEMENT FEES	26,147	26,147		0
BANK CHARGES	75	75		0
PA FILING FEE	15	0		0
MISCELLANEOUS EXPENSES	116	116		0

TY 2016 Taxes Schedule**Name:** LUTRON FOUNDATION**EIN:** 23-2322928

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	569	569		0
FEDERAL TAXES	8,586	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 LUTRON FOUNDATION	Employer identification number 23-2322928

Organization type (check one)

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

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% 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 LUTRON FOUNDATION	Employer identification number 23-2322928
--	---

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	LUTRON ELECTRONICS CO INC 7200 SUTER ROAD COOPERSBURG, PA 18036	\$ 700,000	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)
-		\$	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

23-2322928

Part II	Noncash Property
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Schedule B (Form 990, 990-EZ, or 990-PF) (2016)

Name of organization

LUTRON FOUNDATION

Employer identification number

23-2322928

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