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Form **990-PF**

Return of Private Foundation

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

OMB No 1545-0052

2016Department of the Treasury
Internal Revenue Service

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

Open to Public Inspection

For calendar year 2016 or tax year beginning , and ending

Name of foundation ROBERT F. HUNSICKER FOUNDATION C/O MARILYN H. CUMMINGS		A Employer identification number 23-6430350
Number and street (or P O box number if mail is not delivered to street address) 4919 GRAND BOULEVARD	Room/suite	B Telephone number (see instructions) 863-644-8188
City or town, state or province, country, and ZIP or foreign postal code LAKELAND FL 33812-4027		C If exemption application is pending, check here ☐
G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1 Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col (c), line 16) ► \$ 0	J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1	Contributions, gifts, grants, etc., received (attach schedule)				
2	Check ☒ if the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments	1,575	1,575	1,575	
4	Dividends and interest from securities	15,014	15,014	15,014	
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10 STMT 1	8,138			
b	Gross sales price for all assets on line 6a 38,328				
7	Capital gain net income (from Part IV, line 2)		1,587		
8	Net short-term capital gain			0	
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less: Cost of goods sold				
c	Gross profit or (loss) (attach schedule)				
11	Other income (attach schedule)				
12	Total. Add lines 1 through 11	24,727	18,176	16,589	
13	Compensation of officers, directors, trustees, etc.	0			
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees (attach schedule)				
b	Accounting fees (attach schedule) STMT 2	885	221		664
c	Other professional fees (attach schedule) STMT 3	3,224	3,224		
17	Interest				
18	Taxes (attach schedule) (see instructions) STMT 4	311			311
19	Depreciation (attach schedule) and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses (att sch)				
24	Total operating and administrative expenses. Add lines 13 through 23	4,420	3,445	0	975
25	Contributions, gifts, grants paid SEE STATEMENT 5	25,950			25,950
26	Total expenses and disbursements. Add lines 24 and 25	30,370	3,445	0	26,925
27	Subtract line 26 from line 12				
a	Excess of revenue over expenses and disbursements	-5,643			
b	Net investment income (if negative, enter -0-)		14,731		
c	Adjusted net income (if negative, enter -0-)			16,589	

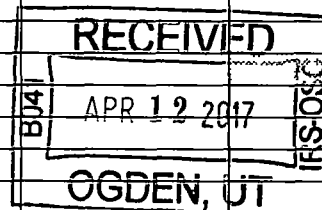
For Paperwork Reduction Act Notice, see instructions.

Form 990-PF (2016)

DAA

SCANNED APR 21 2017
Revenue

Operating and Administrative Expenses



10

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash – non-interest-bearing			
	2	Savings and temporary cash investments			
	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)			
	b	Investments – corporate stock (attach schedule)			
	c	Investments – corporate bonds (attach schedule)			
	11	Investments – land, buildings, and equipment basis ▶			
Liabilities		Less: accumulated depreciation (attach sch) ▶			
	12	Investments – mortgage loans			
	13	Investments – other (attach schedule) SEE STATEMENT 6	376,037	370,394	
	14	Land, buildings, and equipment basis ▶			
		Less: accumulated depreciation (attach sch) ▶			
	15	Other assets (describe ▶)			
	16	Total assets (to be completed by all filers – see the instructions. Also, see page 1, item I)	376,037	370,394	0
	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
Net Assets or Fund Balances	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	
		Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ▶ ☐			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ ☒			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg, and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	376,037	370,394	
	30	Total net assets or fund balances (see instructions)	376,037	370,394	
	31	Total liabilities and net assets/fund balances (see instructions)	376,037	370,394	

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	376,037
2	Enter amount from Part I, line 27a	2	-5,643
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	370,394
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 30	6	370,394

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 CHARLES SCHWAB				
b				
c				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a 1,587			1,587	
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))	
a			1,587	
b				
c				
d				
e				
2 Capital gain net income or (net capital loss)			2	1,587
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8			3	

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2015	27,153	516,367	0.052585
2014	28,332	535,493	0.052908
2013	25,435	507,159	0.050152
2012	24,720	461,079	0.053613
2011	22,692	441,223	0.051430
2 Total of line 1, column (d)			2 0.260688
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 0.052138
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5			4 530,206
5 Multiply line 4 by line 3			5 27,644
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 147
7 Add lines 5 and 6			7 27,791
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 26,925

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter 11/29/67 (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b	1	295
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	295
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	295
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	
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	295
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 Refunded	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)? <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities</i>		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation \$ _____ (2) On foundation managers \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities</i>		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T</i>		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV</i>	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) 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>	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>		X
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>		X

N/A

Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11	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)	12	X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X
14 The books are in care of ► MARILYN CUMMINGS Telephone no ► 863-644-8188 4919 GRAND BLVD. Located at ► LAKELAND FL ZIP+4 ► 33812-4027		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 – Check here and enter the amount of tax-exempt interest received or accrued during the year	15	
16 At any time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►	16	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?	☐ Yes ☒ No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☒ No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	☐ Yes ☒ No	
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	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?	N/A	1c
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016? If "Yes," list the years ► 20 , 20 , 20 , 20	☐ Yes ☒ No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement – see instructions.)	N/A	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 20 , 20 , 20 , 20		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No	
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	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	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?	4b	X

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

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

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

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

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

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

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

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

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

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

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

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

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

If "Yes" to 6b, file Form 8870

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

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
N/A				

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

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

Total number of other employees paid over \$50,000

0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)***3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE."**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services ▶**Part IX-A Summary of Direct Charitable Activities**

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

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

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	538,280
b	Average of monthly cash balances	1b	0
c	Fair market value of all other assets (see instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	538,280
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	538,280
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	8,074
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	530,206
6	Minimum investment return. Enter 5% of line 5	6	26,510

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	26,510
2a	Tax on investment income for 2016 from Part VI, line 5	2a	295
b	Income tax for 2016. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	295
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	26,215
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	26,215
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	26,215

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	26,925
b	Program-related investments – total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	26,925
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	26,925

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				26,215
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2016				
a From 2011				971
b From 2012				1,966
c From 2013				354
d From 2014				1,860
e From 2015				1,646
f Total of lines 3a through e	6,797			
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ 26,925				
a Applied to 2015, but not more than line 2a				
b Applied to undistributed income of prior years (Election required – see instructions)				
c Treated as distributions out of corpus (Election required – see instructions)				
d Applied to 2016 distributable amount				26,215
e Remaining amount distributed out of corpus	710			
5 Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	7,507			
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount – see instructions				
e Undistributed income for 2015 Subtract line 4a from line 2a. Taxable amount – see instructions				
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2017				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)				
8 Excess distributions carryover from 2011 not applied on line 5 or line 7 (see instructions)	971			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	6,536			
10 Analysis of line 9				
a Excess from 2012				1,966
b Excess from 2013				354
c Excess from 2014				1,860
d Excess from 2015				1,646
e Excess from 2016				710

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 foundation 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 foundation 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))
N/A

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.
N/A

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 e-mail address of the person to whom applications should be addressed
N/A

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

c Any submission deadlines
N/A

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

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 Paid during the year SEE STATEMENT 7				25,950
Total			▶ 3a	25,950
b Approved for future payment N/A				
Total			▶ 3b	

Federal Statements**Statement 1 - Form 990-PF, Part I, Line 6a - Sale of Assets**

Whom Sold	Description	Date Acquired	Date Sold	How Received		Cost	Expense	Depreciation	Net Gain / Loss
				Sale Price					
CONAGRA BRANDS INC		3/31/03	11/15/16	\$ 10,705	PURCHASE	\$ 4,528	\$	\$	6,177
HOME DEPOT INC		6/09/09	3/01/16	\$ 25,000	PURCHASE	24,566	434		
TALEN ENERGY CORP		6/13/02	12/06/16	\$ 1,036	PURCHASE	662			374
TOTAL				\$ 36,741		\$ 29,756	\$ 434	\$ 0	\$ 6,551

Statement 2 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
ACCOUNTING	\$ 885	\$ 221	\$	\$ 664
TOTAL	\$ 885	\$ 221	\$ 0	\$ 664

Statement 3 - Form 990-PF, Part I, Line 16c - Other Professional Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
INVESTMENT EXPENSE	\$ 3,224	\$ 3,224	\$	\$
TOTAL	\$ 3,224	\$ 3,224	\$ 0	\$ 0

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Statement 4 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
FEDERAL INCOME TAX - 2015	\$ 311	\$	\$	\$ 311
TOTAL	\$ 311	\$ 0	\$ 0	\$ 311

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Statement 5 - Form 990-PF, Part I, Line 25 - Noncash Contributions, Gifts, Grants

<u>Amount</u>	<u>Noncash Description</u>	<u>FMV Explanation</u>	<u>Book Value Amount</u>	<u>Book Value Explanation</u>	<u>Date</u>
5,000					3/01/16
1,000					11/30/16
1,000					11/30/16
500					11/30/16
500					11/30/16
500					11/30/16
500					11/30/16
200					11/30/16
1,200					11/30/16
1,000					11/30/16
1,000					11/30/16
1,000					11/30/16
1,000					11/30/16
1,000					11/06/16
700					12/30/16
750					12/30/16
700					12/30/16
1,000					12/30/16
1,000					12/30/16
1,000					12/30/16
1,000					12/30/16
700					12/30/16
500					12/30/16
1,000					12/14/16
900					12/14/16
500					12/14/16
500					12/14/16
400					12/14/16
300					12/14/16
200					12/14/16
200					12/14/16
200					12/14/16

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Statement 6 - Form 990-PF, Part II, Line 13 - Other Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
SCHWAB INVESTMENT ACCOUNT	\$ 376,037	\$ 370,394	COST	\$
TOTAL	\$ 376,037	\$ 370,394		\$ 0

Statement 7 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year

Name	Address	Relationship	Status	Purpose	Amount
BACH CHOIR OF BETHLEHEM	440 HECKENWELDER PL		PUBLIC	UNSPECIFIED	
BETHLEHEM PA 18018	115 EAST 4TH ST.		PUBLIC	UNSPECIFIED	
BOYS & GIRLS CLUB OF BETHLEHEM	2755 STATION AVE.		PUBLIC	UNSPECIFIED	
BETHLEHEM PA 18015	817 N. KENTUCKY AVE.		PUBLIC	UNSPECIFIED	
PA SHAKESPEARE FESTIVAL	PO BOX 860		PUBLIC	UNSPECIFIED	
CENTER VALLEY PA 18034	255 N. BROADWAY AVE.		PUBLIC	UNSPECIFIED	
TALBOT HOUSE MINISTRIES	26 NORTH 6TH ST.		PUBLIC	UNSPECIFIED	
LAKELAND FL 33802	430 E. BROAD ST.		PUBLIC	UNSPECIFIED	
BETH-EL FARMWORKER MIN	337 WYANDOTTE ST.		PUBLIC	UNSPECIFIED	
WIMAUMA FL 33598	3145 HAMILTON BLVD BYPASS		PUBLIC	UNSPECIFIED	
SPEAK FOR THE CHILDREN	175 LAKE HOLLINGSWORTH DR		PUBLIC	UNSPECIFIED	
BARTOW FL 33830	235 N. MADISON ST.		PUBLIC	UNSPECIFIED	
EL SYSTEMA-ALLENTOWN SYMPHONY	444 E. SUSQUEHANNA ST.		PUBLIC	UNSPECIFIED	
ALLENTOWN PA 18101					
YMCA OF BETHLEHEM, PA					
BETHLEHEM PA 18018					
NEW BETHANY MINISTRIES					
BETHLEHEM PA 18015					
THE DA VINCI CENTER					
ALLENTOWN PA 18103					
FRIENDS OF THE PERFORMING ARTS					
LAKELAND FL 33801					
COMMUNITY BIKE WORKS					
ALLENTOWN PA 18102					
TURNING POINT OF L.V.					
ALLENTOWN PA 18103					

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Statement 7 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)

Name	Address	Relationship	Status	Purpose	Amount
LEHIGH COUNCIL OF CHURCHES ALLENTOWN PA 18102	534 CHEW ST.	PUBLIC	UNSPECIFIED		
VICTORY HOUSE ALLENTOWN PA 18101	829 LINDEN ST.	PUBLIC	UNSPECIFIED		
MEALS ON WHEELS LEHIGH CNTY ALLENTOWN PA 18101	4234 DORNEY PARK RD	PUBLIC	UNSPECIFIED		
FRANKLIN PARK ZOO BOSTON MA 02121	1 FRANKLIN PARK RD.	PUBLIC	UNSPECIFIED		
NEEDHAM COMMUNITY FARM, INC. NEEDHAM MA 02492	PO BOX 920877	PUBLIC	UNSPECIFIED		
BIG BROTHERS & SISTERS MASS. BAY BOSTON MA 02110	75 FEDERAL ST.	PUBLIC	UNSPECIFIED		
BAY COLONY TRAIL ASSOC. NEEDHAM MA 02492	PO BOX 920560	PUBLIC	UNSPECIFIED		
OLD NORTH FOUNDATION OF BOSTON BOSTON MA 02113	193 SALEM ST.	PUBLIC	UNSPECIFIED		
CHARLES RIVER YMCA NEEDHAM MA 02492	863 GREAT PLAIN AVE.	PUBLIC	UNSPECIFIED		
VERMONT REFUGEE RESETTLEMENT COLCHESTER VT 05446	462 HEGEMAN AVE.	PUBLIC	UNSPECIFIED		
POPULATION MEDIA CENTER S. BURLINGTON VT 05403	30 KIMBALL AVE.	PUBLIC	UNSPECIFIED		
COMMITTEE ON TEMPORARY SHELTER BURLINGTON VT 05402	PO BOX 1616	PUBLIC	UNSPECIFIED		
THE HOWARD CENTER BURLINGTON VT 05401	208 FLYNN AVE.	PUBLIC	UNSPECIFIED		
SHELburne FARMS SHELburne VT 05482	1611 HARBOR ROAD	PUBLIC	UNSPECIFIED		
YOUNG TRADITION VERMONT FAIRFAX VT 05454	PO BOX 163	PUBLIC	UNSPECIFIED		
LAKE CHAMPLAIN INTERNATIONAL COLCHESTER VT 05446	531 MAIN ST.	PUBLIC	UNSPECIFIED		
BURLINGTON CITY ARTS BURLINGTON VT 05401	135 CHURCH ST.	PUBLIC	UNSPECIFIED		

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Statement 7 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the
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Name		Address		Relationship	Status	Purpose	Amount
CHITTENDON CNTY HUMANE SOCIETY		124 KINDNESS COURT				UNSPECIFIED	
S. BURLINGTON VT 05403		PUBLIC					
"AMERICANS WE" CONCERT		26 NORTH 6TH STREET					5,000
ALLENTOWN PA 18101		P.O. BOX 29690					1,000
AFRICAN CHILDREN'S CHOIR		26 NORTH 6TH STREET					1,000
BELLINGHAM WA 98228		534 CHEW STREET					500
EL SYSTEMA		430 E. BROAD STREET					500
ALLENTOWN PA 18101		2755 STATION AVENUE					500
LEHIGH COUNCIL OF CHURCHES		2755 STATION AVENUE					500
ALLENTOWN PA 18102		337 WYANDOTTE STREET					200
YMCA OF BETHLEHEM		814 N. KENTUCKY AVE					1,200
BETHLEHEM PA 18018		P.O. BOX 860					1,000
DESALES UNIVERSITY		255 NORTH BROADWAY AVE					1,000
CENTER VALLEY PA 18034		175 LAKE HOLLINGSWORTH DR					1,000
PA SHAKESPEARE FESTIVAL		235 NORTH MADISON STREET					700
CENTER VALLEY PA 18034		4234 DORNEY PARK ROAD					750
NEW BETHANY MINISTRIES		829 LINDEN ST					700
BETHLEHEM PA 18015-9911		444 E. SUSQUEHANNA ST					
TALBOT HOUSE MINISTRIES OF LAKELAND							
LAKELAND FL 33802							
BETH-EL FARMWORKER MINISTRIES							
WIMAUMA FL 33598-0860							
SPEAK FOR THE CHILDREN							
BARTOW FL 33830							
FRIENDS OF THE PERFORMING ARTS							
LAKELAND FL 33801							
COMMUNITY BIKE WORKS							
ALLENTOWN PA 18102							
MEALS ON WHEELS OF LEHIGH COUNTY							
ALLENTOWN PA 18104							
VICTORY HOUSE							
ALLENTOWN PA 18101							
TURNING POINT OF THE LEHIGH VALLEY							
ALLENTOWN PA 18103							

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Name		Address		Relationship	Status	Purpose	Amount
SOUDERTON AREA BASEBALL LEAGUE		SOUDERTON PA 18964-4766		P.O. BOX 64766			1,000
FRANKLIN PARK ZOO		BOSTON MA 02121		1 FRANKLIN PARK ROAD			1,000
OLD NORTH FOUNDATION OF BOSTON		BOSTON MA 02113		193 SALEM STREET			1,000
CHARLES RIVER YMCA		NEEDHAM MA 02492		863 GREAT PLAIN AVE			1,000
PLANNED PARENTHOOD FEDERATION		WASHINGTON DC 20090-7166		P.O. BOX 97166			700
BIG BROTHERS BIG SISTERS OF MA BAY		BOSTON MA 02110		75 FEDERAL STREET			500
VERMONT REFUGEE RESETTLEMENT PROGRA		COLCHESTER VT 05446		462 HEGEMAN AVENUE			1,000
POPULATION MEDIA CENTER		SOUTH BURLINGTON VT 05403		30 KIMBALL AVENUE			900
COMMITTEE ON TEMPORARY SHELTER		BURLINGTON VT 05402		P.O. BOX 1616			500
THE HOWARD CENTER		BURLINGTON VT 05401		208 FLYNN AVENUE			500
SHELburne FARMS		SHELburne VT 05482		1611 HARBOR ROAD			400
YOUNG TRADITION		FAIRFAX VT 05454		P.O. BOX 163			300
LAKE CHAMPLAIN COMMITTEE		BURLINGTON VT 05401		208 FLYNN AVENUE			200
BURLINGTON CITY ARTS		BURLINGTON VT 05401		135 CHURCH STREET			200
CHITTENDON COUNTY HUMANE SOCIETY		SOUTH BURLINGTON VT 05403		124 KINDNESS COURT			200

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Statement 7 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the
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Name	Address	Relationship	Status	Purpose	Amount
TOTAL					25,950