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

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2016

Open to Public Inspection

For calendar year 2016 or tax year beginning

, and ending

Name of foundation <b>THE R.C. MUSSON AND KATHERINE MUSSON CHARITABLE FOUNDATION</b>		A Employer identification number <b>34-1549070</b>
Number and street (or P.O. box number if mail is not delivered to street address) <b>P.O. BOX 7038</b>	Room/suite	B Telephone number <b>(330) 773-7651</b>
City or town, state or province, country, and ZIP or foreign postal code <b>AKRON, OH 44306-0038</b>		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) <b>\$ 3,166,705.</b>	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check <input checked="" type="checkbox"/> If the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities		134,549.	134,549.		STATEMENT 1
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		<19,863.>			
b Gross sales price for all assets on line 6a		704,603.			
7 Capital gain net income (from Part IV, line 2)			0.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less: Cost of goods sold					
c Gross profit or (loss)					
11 Other income					
12 Total. Add lines 1 through 11		114,686.	134,549.		
13 Compensation of officers, directors, trustees, etc.		31,400.	2,802.		25,223.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 2		6,800.	0.		6,800.
c Other professional fees STMT 3		30,772.	23,079.		7,693.
17 Interest					
18 Taxes STMT 4		5,309.	1,712.		3,597.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 5		237.	0.		237.
24 Total operating and administrative expenses. Add lines 13 through 23		74,518.	27,593.		43,550.
25 Contributions, gifts, grants paid		183,213.			183,213.
26 Total expenses and disbursements. Add lines 24 and 25		257,731.	27,593.		226,763.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		<143,045.>			
b Net investment income (if negative, enter -0-)			106,956.		
c Adjusted net income (if negative, enter -0-)				N/A	

**THE R.C. MUSSON AND KATHERINE MUSSON  
CHARITABLE FOUNDATION**

Part II Balance Sheets		Beginning of year	End of year	
Attached schedules and amounts in the description column should be for end-of-year amounts only		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	189,843.	260,631.	260,631.
	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			
	7 Other notes and loans receivable			
	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			
	b Investments - corporate stock STMT 6	3,203,295.	2,989,462.	2,906,074.
	c Investments - corporate bonds			
	Liabilities	11 Investments - land, buildings, and equipment basis		
Less accumulated depreciation				
12 Investments - mortgage loans				
13 Investments - other				
14 Land, buildings, and equipment basis				
Less accumulated depreciation				
15 Other assets (describe)				
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		3,393,138.	3,250,093.	3,166,705.
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				
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 checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted	3,393,138.	3,250,093.	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here <input type="checkbox"/> 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			
30 Total net assets or fund balances	3,393,138.	3,250,093.		
31 Total liabilities and net assets/fund balances	3,393,138.	3,250,093.		

**Part III Analysis of Changes in Net Assets or Fund Balances**

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	3,393,138.
2 Enter amount from Part I, line 27a	2	<143,045.>
3 Other increases not included in line 2 (itemize)	3	0.
4 Add lines 1, 2, and 3	4	3,250,093.
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	3,250,093.

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**Part I 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.)
<b>1a DILAURO WRACHER &amp; THOMAS / RAYMOND JAMES AND</b>			
<b>b ASSOCIATES, INC. (SEE ATTACHED)</b>	<b>P</b>	<b>VARIOUS</b>	<b>12/31/16</b>
<b>c</b>			
<b>d</b>			
<b>e</b>			

(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)
<b>a</b>			
<b>b 704,603.</b>		<b>724,466.</b>	<b>&lt;19,863.&gt;</b>
<b>c</b>			
<b>d</b>			
<b>e</b>			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
<b>a</b>			
<b>b</b>			<b>&lt;19,863.&gt;</b>
<b>c</b>			
<b>d</b>			
<b>e</b>			

<b>2</b> Capital gain net income or (net capital loss)	<div> <div>If gain, also enter in Part I, line 7</div> <div>If (loss), enter -0- in Part I, line 7</div> </div>	<b>2</b>	<b>&lt;19,863.&gt;</b>
<b>3</b> Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8		<b>3</b>	<b>N/A</b>

**Part II 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	216,349.	3,385,084.	.063912
2014	234,289.	3,571,932.	.065592
2013	209,410.	3,489,216.	.060016
2012	211,370.	3,074,621.	.068747
2011	218,811.	3,054,235.	.071642

<b>2</b> Total of line 1, column (d)	<b>2</b>	<b>.329909</b>
<b>3</b> 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	<b>3</b>	<b>.065982</b>
<b>4</b> Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	<b>4</b>	<b>3,128,295.</b>
<b>5</b> Multiply line 4 by line 3	<b>5</b>	<b>206,411.</b>
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)	<b>6</b>	<b>1,070.</b>
<b>7</b> Add lines 5 and 6	<b>7</b>	<b>207,481.</b>
<b>8</b> Enter qualifying distributions from Part XII, line 4	<b>8</b>	<b>226,763.</b>

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.

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**Part V Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)**

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1 1,070.
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 1,070.
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 1,070.
6 Credits/Payments:		
a 2016 estimated tax payments and 2015 overpayment credited to 2016	6a 2,640.	
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 2,640.	
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 1,570.	
11 Enter the amount of line 10 to be: Credited to 2017 estimated tax <input checked="" type="checkbox"/> 1,570. Refunded <input type="checkbox"/> 0.	11 0.	

**Part VI Statements Regarding Activities**

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?	Yes	No
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ 0. (2) On foundation managers. \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?	N/A	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <b>OH</b>		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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## CHARITABLE FOUNDATION

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**Part VII** Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <b>N/A</b>	X	
14 The books are in care of <b>ROBERT S. SEGERS</b> Telephone no. <b>(330) 773-7651</b> Located at <b>P.O. BOX 7038, AKRON, OH</b> ZIP+4 <b>44306-0038</b>		
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 <b>15</b> <b>N/A</b>		
16 At any time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country		X

**Part VIII** Statements Regarding Activities for Which Form 4720 May Be Required

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

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here <b>N/A</b>		
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2016?		X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016? If "Yes," list the years	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) <b>N/A</b>		
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 2016 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2016.) <b>N/A</b>		
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2016?		X

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CHARITABLE FOUNDATION**
**Part VII 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? ☐ Yes ☐ No

N/A

6b

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 ☒ Nob Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ Yes ☒ No

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 ☒ Nob If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ Yes ☒ No

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.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 7		31,400.	0.	0.

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

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

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

0

*(continued)*

## 0



**THE R.C. MUSSON AND KATHERINE MUSSON  
CHARITABLE FOUNDATION**

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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	3,012,729.
<b>b</b>	Average of monthly cash balances	<b>1b</b>	163,205.
<b>c</b>	Fair market value of all other assets	<b>1c</b>	
<b>d</b>	<b>Total</b> (add lines 1a, b, and c)	<b>1d</b>	3,175,934.
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	0.
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	0.
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	3,175,934.
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	<b>4</b>	47,639.
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	3,128,295.
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	156,415.

**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.)

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	156,415.
<b>2a</b>	Tax on investment income for 2016 from Part VI, line 5	<b>2a</b>	1,070.
<b>b</b>	Income tax for 2016. (This does not include the tax from Part VI.)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	1,070.
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	155,345.
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	0.
<b>5</b>	Add lines 3 and 4	<b>5</b>	155,345.
<b>6</b>	Deduction from distributable amount (see instructions)	<b>6</b>	0.
<b>7</b>	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	155,345.

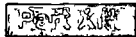
**Part XII Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b>	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	<b>1a</b>	226,763.
<b>b</b>	Program-related investments - total from Part IX-B	<b>1b</b>	0.
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	226,763.
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	<b>5</b>	1,070.
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	225,693.

**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.

Form 990-PF (2016)

**THE R.C. MUSSON AND KATHERINE MUSSON  
CHARITABLE FOUNDATION**

**Undistributed Income** (see instructions)

	(a) Corpus	(b) Years prior to 2015	(c) 2015	(d) 2016
<b>1</b> Distributable amount for 2016 from Part XI, line 7				<b>155,345.</b>
<b>2</b> Undistributed Income, if any, as of the end of 2016:				
<b>a</b> Enter amount for 2015 only			0.	
<b>b</b> Total for prior years:		0.		
<b>3</b> Excess distributions carryover, if any, to 2016:				
<b>a</b> From 2011	69,477.			
<b>b</b> From 2012	59,399.			
<b>c</b> From 2013	46,729.			
<b>d</b> From 2014	59,838.			
<b>e</b> From 2015	49,714.			
<b>f</b> Total of lines 3a through e	285,157.			
<b>4</b> Qualifying distributions for 2016 from Part XII, line 4: ▶ \$	226,763.			
<b>a</b> Applied to 2015, but not more than line 2a			0.	
<b>b</b> Applied to undistributed income of prior years (Election required - see instructions)		0.		
<b>c</b> Treated as distributions out of corpus (Election required - see instructions)	0.			
<b>d</b> Applied to 2016 distributable amount				155,345.
<b>e</b> Remaining amount distributed out of corpus	71,418.			
<b>5</b> Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus: Add lines 3f, 4c, and 4e. Subtract line 5	356,575.			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b		0.		
<b>c</b> 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.		
<b>d</b> Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
<b>e</b> Undistributed income for 2015. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
<b>f</b> Undistributed income for 2016. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2017				0.
<b>7</b> 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.			
<b>8</b> Excess distributions carryover from 2011 not applied on line 5 or line 7	69,477.			
<b>9</b> Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	287,098.			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2012	59,399.			
<b>b</b> Excess from 2013	46,729.			
<b>c</b> Excess from 2014	59,838.			
<b>d</b> Excess from 2015	49,714.			
<b>e</b> Excess from 2016	71,418.			

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

**Part VIII 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).)

**NONE**

- 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.

**NONE**

**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:

**SEE STATEMENT 8**

- 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:

**THE R.C. MUSSON AND KATHERINE MUSSON  
CHARITABLE FOUNDATION**

**Supplementary Information** (continued)

<b>3 Grants and Contributions Paid During the Year or Approved for Future Payment</b>				
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)				
<b>a Paid during the year</b>				
SEE ATTACHED LIST OF RECIPIENTS.	N/A	ALL ARE 501(C)(3) STATUS.	SEE ATTACHED STATEMENT FOR PURPOSE OF GRANT.	183,213.
<b>Total</b>			<b>3a</b>	183,213.
<b>b Approved for future payment</b>				
NONE				
<b>Total</b>			<b>3b</b>	0.

Form **990-PF** (2016)

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December 31, 2015 to December 30, 2016

## Your Activity (continued)

Musson 2 - Russell Account No. 30485500

### Realized Capital Gains & Losses

#### Long Term

Description	(Symbol or CUSIP)	Quantity	Opening Date	Opening Amount	Closing Date	Closing Amount	Gain or (Loss) Pct.	Gain or (Loss)
RUSSELL STRATEGIC BOND FUND CLASS I N/L (RBCSX)		7,869.835	04/18/2013	\$88,207.18	01/21/2016	\$83,341.55	(5.51)%	\$ (4,865.63)
RUSSELL GLOBAL REAL ESTATE SECURITIES FUND CLASS S N/L (RRESX)		73.121	04/18/2013	\$3,111.30	01/21/2016	\$2,387.40	(23.26)%	\$ (723.90)
RUSSELL GLOBAL OPPORTUNISTIC CREDIT FUND CLASS S N/L (RGCSX)		2,094.606	04/18/2013	\$22,244.71	01/21/2016	\$17,971.72	(19.20)%	\$ (4,272.99)
RUSSELL GLOBAL INFRASTRUCTURE FUND CLASS S N/L (RGISX)		333.275	04/18/2013	\$3,892.65	01/21/2016	\$3,256.10	(16.35)%	\$ (636.55)
RUSSELL COMMODITY STRATEGIES FUND CLASS S N/L (RCCSX)		617.200	04/18/2013	\$5,400.50	01/21/2016	\$2,987.25	(44.68)%	\$ (2,413.25)
RUSSELL MULTI STRATEGY ALTERNATIVE FUND CLASS S N/L (RMSXOLD1)		1,214.757	04/18/2013	\$12,548.44	01/21/2016	\$10,750.60	(14.32)%	\$ (1,797.84)
RUSSELL GLOBAL EQUITY FUND CLASS S N/L (RGESX)		336.977	04/18/2013	\$3,238.35	07/14/2016	\$3,437.17	6.13%	\$198.82
RUSSELL US SMALL CAP EQUITY FUND CLASS I N/L (REBSX)		1,723.117	04/18/2013	\$45,665.92	07/14/2016	\$48,333.44	5.84%	\$2,667.52
RUSSELL INTERNATIONAL DEVELOPED MARKETS FUND CLASS I (RINSX)		810.201	04/18/2013	\$25,581.85	07/14/2016	\$26,922.98	5.24%	\$1,341.13



December 31, 2015 to December 30, 2016

**Your Activity (continued)**

Musson 2 - Russell Account No. 30485500

**Realized Capital Gains & Losses (continued) <sup>o</sup>****Long Term (continued)**

Description (Symbol or CUSIP)	Quantity	Opening Date	Opening Amount	Closing Date	Closing Amount	Gain or (Loss) Pct.	Gain or (Loss)
RUSSELL EMERGING MARKETS FUND CLASS S N/L (REMSX)	1,296.807	04/18/2013	\$23,705.63	07/14/2016	\$20,411.75	(13.89)%	\$(3,293.88)
RUSSELL GLOBAL REAL ESTATE SECURITIES FUND CLASS S N/L (RRESX)	73.235	04/18/2013	\$3,116.15	07/14/2016	\$2,784.40	(10.64)%	\$(331.75)
RUSSELL GLOBAL INFRASTRUCTURE FUND CLASS S N/L (RGISX)	312.161	VARIOUS	\$3,588.33	07/14/2016	\$3,692.86	2.91%	\$104.53
RUSSELL GLOBAL INFRASTRUCTURE FUND CLASS S N/L (RGISX)	3,353.038	04/18/2013	\$39,164.18	07/14/2016	\$39,667.15	1.28%	\$502.97
RUSSELL COMMODITY STRATEGIES FUND CLASS S N/L (RCCSX)	6,310.962	04/18/2013	\$55,220.91	07/14/2016	\$35,278.28	(36.11)%	\$(19,942.63)
RUSSELL US STRATEGIC EQUITY FUND CLASS S N/L (RSESX)	16,669.215	04/18/2013	\$185,695.04	07/14/2016	\$202,697.65	9.15%	\$17,002.61
RUSSELL MULTI STRATEGY ALTERNATIVE FUND CLASS S N/L (RMSSXOLD1)	395.858	VARIOUS	\$3,909.40	07/14/2016	\$3,520.24	(9.95)%	\$(389.16)
RUSSELL MULTI STRATEGY ALTERNATIVE FUND CLASS S N/L (RMSSXOLD1)	8,454.188	04/18/2013	\$87,331.76	07/14/2016	\$75,180.56	(13.91)%	\$(12,151.20)
RUSSELL MULTI STRATEGY ALTERNATIVE FUND CLASS S N/L (RMSSXOLD1)	659.039	01/03/2014	\$6,807.87	07/14/2016	\$5,860.64	(13.91)%	\$(947.23)
RUSSELL GLOBAL EQUITY FUND CLASS S N/L (RGESX)	2,278.632	04/18/2013	\$21,897.65	11/30/2016	\$24,107.93	10.09%	\$2,210.28
RUSSELL US SMALL CAP EQUITY FUND CLASS I N/L (REBSX)	680.099	04/18/2013	\$18,023.94	11/30/2016	\$20,899.44	15.95%	\$2,875.50
RUSSELL INTERNATIONAL DEVELOPED MARKETS FUND CLASS I (RINSX)	448.002	04/18/2013	\$14,145.53	11/30/2016	\$15,079.76	6.60%	\$934.23
RUSSELL EMERGING MARKETS FUND CLASS S N/L (REMSX)	665.010	04/18/2013	\$12,156.38	11/30/2016	\$10,646.81	(12.41)%	\$(1,509.57)
RUSSELL US STRATEGIC EQUITY FUND CLASS S N/L (RSESX)	3,573.781	04/18/2013	\$39,811.92	11/30/2016	\$45,387.02	14.00%	\$5,575.10
<b>Net Long-Term Gain / Loss Total</b>			<b>\$724,465.59</b>		<b>\$704,602.70</b>	<b>(2.74)%</b>	<b>\$(19,862.89)</b>

<sup>o</sup> Please see Cost Basis on the Understanding Your Statement page.



The Wealth Advisory Group of

**DiLauro Wracher & Thomas**

An Independent Firm

December 31, 2015 to December 30, 2016

**Your Activity (continued)**

Musson 2 - Russell Account No. 30485500

## Realized Capital Gains & Losses (continued) <sup>o</sup>

### Summary of Gains & Losses

	Year To Date
Short-Term Gain	\$0.00
Short-Term Loss	\$0.00
Long-Term Gain	\$33,412.69
Long-Term Loss	\$(53,275.58)
<b>Net Gain / Loss Total</b>	<b>\$(19,862.89)</b>



30485500-98-1 8PM/2L71

## FORM 990-PF

## DIVIDENDS AND INTEREST FROM SECURITIES

## STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
RAYMOND JAMES - DIVIDEND INCOME	134,462.	0.	134,462.	134,462.	
RAYMOND JAMES - INTEREST INCOME	87.	0.	87.	87.	
TO PART I, LINE 4	134,549.	0.	134,549.	134,549.	

## FORM 990-PF

## ACCOUNTING FEES

## STATEMENT 2

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
THORNHILL FINANCIAL, INC.	6,800.	0.		6,800.
TO FORM 990-PF, PG 1, LN 16B	6,800.	0.		6,800.

## FORM 990-PF

## OTHER PROFESSIONAL FEES

## STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
RAYMOND JAMES INVESTMENT MANAGEMENT FEES	30,772.	23,079.		7,693.
TO FORM 990-PF, PG 1, LN 16C	30,772.	23,079.		7,693.

## FORM 990-PF

## TAXES

## STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES PAID	1,712.	1,712.		0.
OTHER TAXES PAID	3,597.	0.		3,597.
TO FORM 990-PF, PG 1, LN 18	5,309.	1,712.		3,597.

## FORM 990-PF

## OTHER EXPENSES

## STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ADMINISTRATIVE EXPENSES	237.	0.		237.
TO FORM 990-PF, PG 1, LN 23	237.	0.		237.

## FORM 990-PF

## CORPORATE STOCK

## STATEMENT 6

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
RAYMOND JAMES ACCOUNT #30485500	2,989,462.	2,906,074.
TOTAL TO FORM 990-PF, PART II, LINE 10B	2,989,462.	2,906,074.

FORM 990-PF

PART VIII - LIST OF OFFICERS, DIRECTORS  
TRUSTEES AND FOUNDATION MANAGERS

STATEMENT 7

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
IRVIN J. MUSSON III P. O. BOX 7038 AKRON, OH 443060038	TRUSTEE 5.00	6,750.	0.	0.
ROBERT S. SEGERS P. O. BOX 7038 AKRON, OH 443060038	TRUSTEE 8.00	8,850.	0.	0.
BENNIE D. SEGERS P. O. BOX 7038 AKRON, OH 443060038	TRUSTEE 5.00	3,375.	0.	0.
JOSEPH MUSSON P.O. BOX 7038 AKRON, OH 443060038	TRUSTEE 5.00	9,050.	0.	0.
WILLIAM J. SEGERS P. O. BOX 7038 AKRON, OH 443060038	TRUSTEE 5.00	3,375.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		31,400.	0.	0.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION  
PART XV, LINES 2A THROUGH 2D

STATEMENT 8

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

THE R.C. MUSSON AND KATHARINE M. MUSSON CHARABLE FOUNDATION  
P.O. BOX 7038  
AKRON, OH 44306

TELEPHONE NUMBER

(330) 773-7651

FORM AND CONTENT OF APPLICATIONS

NARRATIVE PREPARED BY DONEE.

ANY SUBMISSION DEADLINES

NONE

RESTRICTIONS AND LIMITATIONS ON AWARDS

NONE

**The R.C. Musson and Katharine M. Musson  
Charitable Foundation  
2016 Donation List**

Recipient Name and Address	Recipient Relationship	Purpose of Grant	Amount
Access, Inc.	N/A	Charitable	\$2,500
Akron Art Museum	N/A	Family Days Program	\$2,000
Akron-Canton Regional Food Bank	N/A	Charitable	\$2,500
Akron Children's Museum	N/A	Programming	\$2,000
Akron Inner City Soccer Club	N/A	Charitable	\$1,500
Akron Marathon	N/A	Charitable	\$1,500
Akron Symphony	N/A	Student Tickets	\$1,500
Akron Zoo	N/A	Charitable	\$3,000
American Red Cross	N/A	Disaster Relief	\$2,000
Ballet Excel Ohio	N/A	Charitable	\$1,000
Boys and Girls Clubs of Western Reserve	N/A	General Operating	\$2,000
Boy Scouts of America, Great Trail Council	N/A	Pathfinder District Initiative	\$2,500
Broken Chains Ministry	N/A	Educational Programs in Summit County	\$2,000
CASA/GAL Program of Summit County	N/A	Programs For Abused and Neglected Children	\$3,000
Children's Concert Society	N/A	Live Musical Performances	\$1,500
Crown Point Ecology Center	N/A	Organic Farming Apprentice Program	\$2,000
Cuyahoga Valley Scenic Railroad	N/A	Power System Project	\$3,500
Dr. Bob's Home	N/A	Renovations Program	\$2,500
Evant, Inc	N/A	Educator Stipend for Art Project	\$600
Family Promise of Summit County	N/A	General Operating	\$1,500
Freedom House For Women	N/A	Adult Supportive Services	\$1,500
Friends of Ninety-One Three	N/A	Charitable	\$2,000
Girls on the Run of Northeast Ohio	N/A	Youth Development Program	\$1,000
Goodwill Industries	N/A	General Operating	\$2,500
Guardians Advoc. Child Safety and Protection	N/A	Child Safety Programs	\$1,500
Habitat for Humanity of Summit County	N/A	Charitable	\$2,000
Hammer & Nails, Inc.	N/A	Charitable	\$2,500
Hattle Larham	N/A	Summit ArtSpace Studio Scholarships	\$1,500
Haven of Rest Ministries	N/A	Residential Programs	\$5,000
Here's Hope Horse Farm	N/A	Special Needs Student Programs	\$2,813
Humane Society of Greater Akron	N/A	Operating Expenses	\$2,500
IBH Addiction Recovery Center	N/A	Purchase Furniture	\$2,000
International Soap Box Derby Inc	N/A	STEM Educational Programming	\$3,500
Keep Akron Beautiful	N/A	Charitable	\$4,000
Law Enforcement Foundation	N/A	Community Education Program	\$1,000
League of Women Voters	N/A	Voter Informational Programs	\$300
Let's Grow Akron, Inc.	N/A	Charitable	\$1,500
Love An Angel Foundation	N/A	Roof Replacement & Maintenance	\$2,000
Magical Theatre Company	N/A	Outreach Program Capital Campaign	\$2,500
Mature Services	N/A	Senior Volunteer Recognition Program	\$1,500
Middlebury Chapel Open Hand Food Pantry	N/A	Operating Expenses	\$3,000
Mobile Meals of Akron, Inc.	N/A	Home Delivered Meals Program	\$3,000
Ohio Foundation of Independent Colleges	N/A	Annual Fund Campaign	\$3,500
OPEN M	N/A	Free Medical Clinic	\$3,500
Rebuilding Together Northeast Ohio	N/A	Elderly and Disabled Homeowners	\$2,500
RePlay for Kids	N/A	Operating Expenses	\$1,500
SCORE	N/A	Operating Expenses	\$2,500
South Street Ministries	N/A	Staffing Support	\$2,500
Stan Hywet Hall & Gardens, Inc	N/A	Charitable	\$4,000
Stewart's Caring Place	N/A	Programs For Cancer Patients	\$3,000
The ARC of Summit & Portage Counties	N/A	Service Coordinator Project	\$3,000
The Civic Theater	N/A	Community Based Programming	\$2,500
The Grief Care Place	N/A	General Program Support	\$1,500
The Furnace Street Mission	N/A	Safety Forces Chaplaincy Center	\$4,000
The Salvation Army	N/A	Homeless Mobile Outreach	\$2,000
The Summit County Historical Society	N/A	Akron's Historic Homes of Mutton Hill	\$10,000
Truly Reaching You Ministries	N/A	Re-entry and Employment Training Programs	\$1,000
The University of Akron	N/A	Gathering Place in InfoCision Stadium	\$25,000
The University of Akron Foundation	N/A	Truck and Trailer	\$2,500
Tuesday Musical Association	N/A	Education and Community Outreach Program	\$2,000
United Disability Services	N/A	Toy Resource Center	\$4,000
Victim Assistance Program	N/A	Trauma Therapy Program	\$2,500
Victory Gallop	N/A	Therapeutic Horseback Riding	\$2,500
Wadsworth FISH	N/A	Charitable	\$1,000
Weathervane Playhouse	N/A	Continuing Education Program	\$1,500
Western Reserve Historical Society	N/A	Hale Farm Programs	\$2,000
YMCA of Akron Ohio	N/A	Camp Y - Noah Scholarships	\$2,500
Zane's Foundation, Inc	N/A	Family Support Fund Program	\$1,000

**\$183,213**