Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶ Do not enter social security numbers on this form as it may be made public.
▶ Information about Form 990-PF and its instructions is at *www.irs.gov/form990pf*.

OMB No 1545-0052

2016

Open to Public Inspection

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

Name of foundation
Robert O and Annamae Orr Family Foundation

A Employer identification number
34-1867983

Number and street (or P O box number if mail is not delivered to street address)
525-D Robinwood Lane

Room/suite

B Telephone number (see instructions)
(330) 283-9209

City or town, state or province, country, and ZIP or foreign postal code
Copley, OH 44321

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)*▶$ 7,491,288

J Accounting method ☑ Cash ☐ Accrual
☐ 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 ▶ ☐

Part I **Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))*

			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)				
	2	Check ▶ ☑ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	172,947	172,947		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	-98,506			
	b	Gross sales price for all assets on line 6a 1,659,025				
	7	Capital gain net income (from Part IV, line 2)		0		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)				
	12	**Total.** Add lines 1 through 11	74,441	172,947		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	207,300	20,730		186,570
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)	1,960	1,085		875
	c	Other professional fees (attach schedule)	64,236	64,236		
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	12,525			
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings	325	65		260
	22	Printing and publications				
	23	Other expenses (attach schedule)	507			507
	24	**Total operating and administrative expenses.** Add lines 13 through 23	286,853	86,116		188,212
	25	Contributions, gifts, grants paid	337,000			337,000
	26	**Total expenses and disbursements.** Add lines 24 and 25	623,853	86,116		525,212
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	-549,412			
	b	**Net investment income** (if negative, enter -0-)		86,831		
	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	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	16,077	56,670	56,670
	2	Savings and temporary cash investments	586,686	355,302	355,302
	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)	199,094		
	b	Investments—corporate stock (attach schedule)	5,198,409	4,887,779	5,759,468
	c	Investments—corporate bonds (attach schedule)	1,136,085	1,287,713	1,319,848
	11	Investments—land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach schedule) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach schedule) ▶			
	15	Other assets (describe ▶)	525		
	16	**Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	7,136,876	6,587,464	7,491,288
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	
Net Assets or Fund Balances		**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	7,136,876	6,587,464	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	**Total net assets or fund balances** (see instructions)	7,136,876	6,587,464	
	31	**Total liabilities and net assets/fund balances** (see instructions)	7,136,876	6,587,464	

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	7,136,876
2	Enter amount from Part I, line 27a	2	-549,412
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	6,587,464
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	6,587,464

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			
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	1,659,025		1,757,531	-98,506
b				
c				
d				
e				

	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	
a				-98,506
b				
c				
d				
e				

2 Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	**2**	-98,506
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	462,744	7,819,527	000 059178
2014	500,836	8,155,131	000 061414
2013	615,630	8,243,089	000 074684
2012	608,067	8,501,555	000 071524
2011	555,832	8,943,549	000 062149

2 Total of line 1, column (d)	**2**	000 328949
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**	000 065790
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	**4**	7,379,978
5 Multiply line 4 by line 3	**5**	485,529
6 Enter 1% of net investment income (1% of Part I, line 27b)	**6**	868
7 Add lines 5 and 6	**7**	486,397
8 Enter qualifying distributions from Part XII, line 4	**8**	525,212

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 ▶ ☐ 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 ▶ ☑ and enter 1% of Part I, line 27b	1	868
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	
3	Add lines 1 and 2.	3	868
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	
5	**Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-	5	868
6	Credits/Payments		
a	2016 estimated tax payments and 2015 overpayment credited to 2016 — 6a: 8,544		
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	8,544
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	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	7,676
11	Enter the amount of line 10 to be **Credited to 2017 estimated tax** ▶ 7,676 **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?	1a		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)?	1b		No
	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*			
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? *If "Yes," attach a detailed description of the activities*	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? *If "Yes," attach a conformed copy of the changes*	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? *If "Yes," attach the statement required by General Instruction T*	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? *If "Yes," complete Part II, col (c), and Part XV*	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ OH			
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*	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)? *If "Yes," complete Part XIV*	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	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?	13	Yes	

Website address ▶None

14 The books are in care of ▶Mary C Stark Telephone no ▶(330) 283-9209

Located at ▶525-D Robinwood Lane Copley OH ZIP+4 ▶44321

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

			Yes	No
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?	16		No
	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 ▶			

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

			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)?	1b		No
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
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?	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? ☐ Yes ☑ No

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)	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

			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).*	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))? ☐ 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)?	**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			
	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**		No
	If "Yes" to 6b, file Form 8870			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☑ No			
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	**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	**(e)** Expense account, other allowances
See Additional Data Table				

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	Contributions to employee benefit plans and deferred **(d)** compensation	**(e)** Expense account, other allowances

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

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

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	0
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	6,693,675
b	Average of monthly cash balances.	1b	798,688
c	Fair market value of all other assets (see instructions).	1c	0
d	**Total** (add lines 1a, b, and c).	1d	7,492,363
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation). 1e		
2	Acquisition indebtedness applicable to line 1 assets.	2	
3	Subtract line 2 from line 1d.	3	7,492,363
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	112,385
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	7,379,978
6	**Minimum investment return.** Enter 5% of line 5.	6	368,999

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	368,999
2a	Tax on investment income for 2016 from Part VI, line 5.	2a	868		
b	Income tax for 2016 (This does not include the tax from Part VI).	2b			
c	Add lines 2a and 2b.			2c	868
3	Distributable amount before adjustments Subtract line 2c from line 1.			3	368,131
4	Recoveries of amounts treated as qualifying distributions.			4	
5	Add lines 3 and 4.			5	368,131
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	368,131

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	525,212
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	525,212
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	868
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4.	6	524,344

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					368,131
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.	110,579				
b From 2012.	187,703				
c From 2013.	206,162				
d From 2014.	97,642				
e From 2015.	80,312				
f **Total** of lines 3a through e.		682,398			
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ $ 525,212					
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.					368,131
e Remaining amount distributed out of corpus		157,081			
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		839,479			
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) . . .		110,579			
9 **Excess distributions carryover to 2017.** Subtract lines 7 and 8 from line 6a		728,900			
10 Analysis of line 9					
a Excess from 2012. . . .	187,703				
b Excess from 2013. . . .	206,162				
c Excess from 2014. . . .	97,642				
d Excess from 2015. . . .	80,312				
e Excess from 2016. . . .	157,081				

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))

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

M Stark
525-D Robinwood Lane
Copley, OH 44321
(330) 283-9209

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

No Form Needed Include name, address and confirmation of 501c3 status with request

c Any submission deadlines

None

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

The organization must be a 501c3

Part XV **Supplementary Information** (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year* See Additional Data Table				
Total . . . . ▶ **3a**				337,000
b *Approved for future payment*				
Total . . . . ▶ **3b**				

Part XVI-A Analysis of Income-Producing Activities

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					
4 Dividends and interest from securities.			14	172,947	
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	-98,506	
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).				74,441	

13 **Total.** Add line 12, columns (b), (d), and (e). . . . 13 74,441

(See worksheet in line 13 instructions to verify calculations)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

		Yes	No
1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501 (c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash.	**1a(1)**		**No**
(2) Other assets.	**1a(2)**		**No**
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization.	**1b(1)**		**No**
(2) Purchases of assets from a noncharitable exempt organization.	**1b(2)**		**No**
(3) Rental of facilities, equipment, or other assets.	**1b(3)**		**No**
(4) Reimbursement arrangements.	**1b(4)**		**No**
(5) Loans or loan guarantees.	**1b(5)**		**No**
(6) Performance of services or membership or fundraising solicitations.	**1b(6)**		**No**
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	**1c**		**No**

d If the answer to any of the above is "Yes," complete the following schedule Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received

(a) Line No	**(b)** Amount involved	**(c)** Name of noncharitable exempt organization	**(d)** Description of transfers, transactions, and sharing arrangements

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

******	2017-05-11	******	May the IRS discuss this return with the preparer shown below (see instr)? ☑ **Yes** ☐ **No**
Signature of officer or trustee	Date	Title	

Paid Preparer Use Only

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ▶ ☑	PTIN
Robin L Riemenschneider		2017-05-11		
Firm's name ▶ Select Fiduciary LLC				Firm's EIN ▶
Firm's address ▶ PO Box 420 Rootstown, OH 44272				Phone no (330) 777-0600

Form 990PF Part VIII Line 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
Michael Stark 3475 Ridgewood Road Akron, OH 44333	President 025 00	60,000		
Karen Murray 3475 Ridgewood Road Akron, OH 44333	Exec Dir 035 00	65,700		
Kate Baker 3475 Ridgewood Road Akron, OH 44333	Trustee 010 00	24,000		
Mary Stark 3475 Ridgewood Road Akron, OH 44333	Trustee 010 00	24,000		
Karen Stevens 3475 Ridgewood Road Akron, OH 44333	Trustee 010 00	33,600		

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
ACCESS Inc 230 West Market St Akron, OH 44303		PC	General Operating Support	7,500
Akron Art Museum 1 South High Street Akron, OH 44308		PC	Program Support	30,000
Akron-Canton Regional Foodbank 350 Opportunity Parkway Akron, OH 44307		PC	General Operating Support	20,000
The Akron Zoo 500 Edgewood Rd Akron, OH 44307		PC	General Operating Support	20,000
Community Hall Foundation - Akron Civic Theatre 182 S Main St Akron, OH 44308		PC	Program Support	5,000
Apollo's Fire 3091 Mayfield Rd Suite 217 Cleveland Heights, OH 44118		PC	General Operating Support	2,500
Embracing Futures 50 South Main St LL 100 Akron, OH 44308		PC	Program support	15,000
Boy Scouts of America Great Trail Council 1601 S Main St Akron, OH 44309		PC	Program support	2,000
Boys Hope Girls Hope 9619 Garfield Blvd Cleveland, OH 44125		PC	Program support	10,000
Building for Tomorrow 100 West Cedar Street Akron, OH 44307		PC	General Operating Support	10,000
Canton Challenger Baseball 3078 Huntcliff Rd NE Canton, OH 44721		PC	General Operating Support	5,000
Children's Concert Society of Akron 198 Hill Street Akron, OH 44325		PC	General Operating Support	2,500
Cuyahoga Valley Preservation & Scenic Railway PO Box 158 Peninsula, OH 44264		PC	Program support	5,000
Elves & More of Northeast Ohio PO Box 95 Cuyahoga Falls, OH 44222		PC	Program support	5,000
Goodwill 570 Waterloo Rd Akron, OH 44319		PC	General Operating Support	5,000
Total . . . . ▶ 3a				337,000

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
Greater Cleveland Youth For Christ 3274 W 58th St 205 Cleveland, OH 44102		PC	General Operating Support	10,000
The GriefCare Place 4499 Darrow Rd Stow, OH 44224		PC	General Operating Support	500
Ohio Historical Society - Hale Farm & Village 10825 East Boulevard Cleveland, OH 44106		PC	General Operating Support	5,000
Hattie Larlham Foundation 7996 Darrow Road Suite 10 Twinsburg, OH 44087		PC	Program support	25,000
Ideastream 1375 Euclid Avenue Cleveland, OH 44115		PC	Program support	2,000
Keep Akron Beautiful 850 E Market St Akron, OH 44305		PC	General Operating Support	3,500
Love An Angel Foundation 3108 Vanderhoof Rd New Franklin, OH 44216		PC	General Operating Support	7,500
Mobile Meals 10063 S Broadway St Akron, OH 44311		PC	General Operating Support	10,000
NAMI 150 Cross Street Akron, OH 44311		PC	Program support	10,000
North Coast Community Homes 14221 Broadway Ave Cleveland, OH 44125		PC	Program support	3,000
Oak Clinic 3838 Massillon Rd 360 Uniontown, OH 44685		PC	Program support	15,000
Open M 941 Princeton St Akron, OH 44311		PC	General Operating Support	10,000
Ronald McDonald House 245 Locust St Akron, OH 44302		PC	General Operating Support	50,000
The Furnace Street Mission 140 Furnace Street Akron, OH 44304		PC	General Operating Support	1,000
Salvation Army Summit County PO Box 1884 Akron, OH 44309		PC	Program support	10,000
Total . . . . ▶ **3a**				337,000

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
Stan Hywet Hall & Gardens 714 N Portage Path Akron, OH 44303		PC	Program support	25,000
Victory Gallop 1745 N Hametown Rd Akron, OH 44333		PC	Program support	5,000
Total . . . . ▶ **3a**				337,000

TY 2016 Accounting Fees Schedule

Name: Robert O and Annamae Orr Family Foundation

EIN: 34-1867983

Software ID: 16000333

Software Version: 17.2.0.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Select Fiduciary	1,750	875		875
Huntington tax info fees	210	210		

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2016 Gain/Loss from Sale of Other Assets Schedule

Name: Robert O and Annamae Orr Family Foundation

EIN: 34-1867983

Software ID: 16000333

Software Version: 17.2.0.0

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
Publicly Traded Securities		P			1,659,025	1,757,531			-98,506	

TY 2016 General Explanation Attachment

Name:	Robert O and Annamae Orr Family Foundation
EIN:	34-1867983
Software ID:	16000333
Software Version:	17.2.0.0

TY 2016 Investments Corporate Bonds Schedule

Name: Robert O and Annamae Orr Family Foundation
EIN: 34-1867983
Software ID: 16000333
Software Version: 17.2.0.0

Name of Bond	End of Year Book Value	End of Year Fair Market Value
FFCB 4.950 01/03/2017	98,040	100,000
FHLB 4.625 03/09/2018	103,690	104,073
Duke Energy Indiana 3.75 7/15/20	98,125	104,931
National Rural 5.450	97,920	104,293
Anheuser-Busch Cos Inc 4.500	93,370	103,429
Oracle Corp 5.750	50,750	52,823
Conocophillips 5.200	145,290	151,555
Bank of America 4.750	100,000	105,840
FNMA 1.75	100,672	100,950
FNMA 1.25	99,900	97,167
Union Pacific Corp 1.8	49,980	49,593
3M Company 2.0	49,480	49,012
Anheuser-Busch 2.5	96,880	98,421
Kimberly-Clark Corp 2.4	103,616	97,761

TY 2016 Investments Corporate Stock Schedule

Name: Robert O and Annamae Orr Family Foundation
EIN: 34-1867983
Software ID: 16000333
Software Version: 17.2.0.0

Name of Stock	End of Year Book Value	End of Year Fair Market Value
Apple	84,106	127,865
Automatic Data Processing	32,104	75,852
BBT Corp	53,976	80,169
Bristol Myers Squibb	36,807	65,920
Chevron	34,811	52,965
Coca Cola	38,356	54,644
Exxon Mobil	55,153	73,020
Genuine Parts	31,157	46,432
General Electric	29,821	48,727
Home Depot	26,428	76,157
Illinois Tool Works	31,499	70,047
Procter Gamble	38,602	57,679
US Bancorp	51,549	91,645
IShares Barclays Tips	225,119	238,562
IShares Barclays 1-3 year Credit Bond	124,844	126,558
IShares Barclays 1-3 year Treasury Bond	125,183	125,915
IShares IBOXX Invest Grade	374,577	383,296
JP Morgan Chase	62,447	122,963
Kimberly Clark	36,357	59,913
Pfizer	48,027	72,690
Merck Co	41,617	58,399
Travelers Companies	40,484	69,779
Wells Fargo Co	52,326	84,759
Cisco Systems Inc	51,402	66,091
Conocophillips	42,927	34,346
Honeywell International Inc	40,281	65,803
Johnson Johnson	64,330	73,734
Kraft Heinz Company	56,794	84,962
Occidental Pete	42,630	34,903
VF Corp	40,879	36,385

Name of Stock	End of Year Book Value	End of Year Fair Market Value
Ishares Core SP Small Cap	188,740	226,358
Ishares Russell Midcap	214,561	233,233
Ishares SP 500	261,322	285,001
Ishares SP 500 Value	149,174	161,802
Accenture Plc Cl A	33,881	38,653
Alphabet Inc Cl A	50,548	71,321
Amgen	50,862	46,056
Amphenol	53,696	62,496
Apache	26,383	28,562
Bard Cr	49,321	64,028
Blackrock Inc Cl A	59,490	62,789
Capital One Finl	61,685	60,196
Costco Wholesale Corp	71,323	81,656
Danaher Corp	25,595	30,747
Disney Walt Co	45,245	39,604
Ecolab	61,567	61,541
Intuit	55,044	60,170
MT Bank Corp	49,657	58,661
McDonalds Corp	31,414	65,972
McKesson	49,302	29,495
Nike Inc Cl B	80,404	76,245
Northrop Grumman	33,971	45,353
Oracle	92,591	85,359
PPG Industries	47,841	38,378
Schlumberger	36,924	35,259
Starbucks	56,603	58,296
Thermo Fisher Scientific	47,748	52,207
Union Pac	54,804	55,987
United Technologies	58,760	55,906
Visa	93,608	105,327

Name of Stock	End of Year Book Value	End of Year Fair Market Value
Utilities Select Sector	94,982	109,283
Vanguard Telecommunication	95,490	100,150
IShares Barclays 3-7 Year ETF	399,995	397,667
Advansix Inc	209	487
Microsoft Corp	53,979	62,140
Texas Instruments	36,467	52,903

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TY 2016 Other Assets Schedule

Name: Robert O and Annamae Orr Family Foundation

EIN: 34-1867983

Software ID: 16000333

Software Version: 17.2.0.0

Other Assets Schedule

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
Accrued Interest Purchased	525		

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TY 2016 Other Expenses Schedule

Name: Robert O and Annamae Orr Family Foundation

EIN: 34-1867983

Software ID: 16000333

Software Version: 17.2.0.0

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Copies, postage, checks, letterhead	257			257
Bank fees	50			50
Ohio filing fee	200			200

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TY 2016 Other Professional Fees Schedule

Name: Robert O and Annamae Orr Family Foundation

EIN: 34-1867983

Software ID: 16000333

Software Version: 17.2.0.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Huntington investment fees	64,236	64,236		

TY 2016 Taxes Schedule

Name: Robert O and Annamae Orr Family Foundation

EIN: 34-1867983

Software ID: 16000333

Software Version: 17.2.0.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Tax on investment income estimates	8,544			
Tax on investment income	3,981			