



See a Social Security Number? Say Something!
Report Privacy Problems to <https://public.resource.org/privacy>
Or call the IRS Identity Theft Hotline at 1-800-908-4490



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 separate instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2016

Open to Public Inspection

For calendar year 2016 or tax year beginning , 2016, and ending

RETIREMENT RESEARCH FOUNDATION
8765 WEST HIGGINS ROAD #430
CHICAGO, IL 60631-4170

G Check all that apply:

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name change

H Check type of organization:

☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundationI Fair market value of all assets at end of year
(from Part II, column (c), line 16)

▶ \$ 137,856,810.

J Accounting method:

☐ Cash☒ Accrual☐ Other (specify)

(Part I, column (d) must be on cash basis)

A Employer identification number

36-2429540

B Telephone number (see instructions)

1-773-714-8080

C If exemption application is pending, check here ▶ ☐D 1 Foreign organizations, check here ▶ ☐2 Foreign organizations meeting the 85% test, check here and attach computation. ▶ ☐E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐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

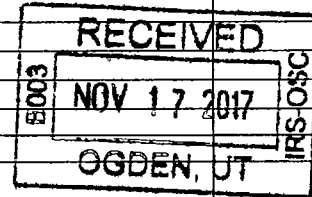
(d) Disbursements for charitable purposes (cash basis only)

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
- 5a Gross rents
- b Net rental income or (loss)
- 6a Net gain or (loss) from sale of assets not on line 10
- b Gross sales price for all assets on line 6a
- 7 Capital gain net income (from Part IV, line 2)
- 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)

SEE STATEMENT 1

12 Total Add lines 1 through 11	246,218.	-306,550.	0.	
13 Compensation of officers, directors, trustees, etc.	431,621.	71,424.		360,197.
14 Other employee salaries and wages	605,559.	13,840.		591,719.
15 Pension plans, employee benefits	304,652.	14,795.		289,857.
16a Legal fees (attach schedule) SEE ST 2	427.			427.
b Accounting fees (attach sch) SEE ST 3	82,665.	30,340.		46,625.
c Other professional fees (attach sch) SEE ST 4	2,341,725.	2,201,330.		124,748.
17 Interest	549,493.	549,493.		
18 Taxes (attach schedule)(see instrs) SEE STM 5	183,764.	142,054.		
19 Depreciation (attach schedule) and depletion	17,791.	1,779.		
20 Occupancy	128,960.	12,896.		116,064.
21 Travel, conferences, and meetings	61,266.	1,707.		59,559.
22 Printing and publications	2,150.	216.		1,934.
23 Other expenses (attach schedule)				
SEE STATEMENT 6	118,495.	3,828.		114,667.
24 Total operating and administrative expenses Add lines 13 through 23	4,828,568.	3,043,702.		1,705,797.
25 Contributions, gifts, grants paid PART XV	4,617,943.			5,367,764.
26 Total expenses and disbursements. Add lines 24 and 25	9,446,511.	3,043,702.	0.	7,073,561.
27 Subtract line 26 from line 12:				
a Excess of revenue over expenses and disbursements	-1,679,015.			
b Net investment income (if negative, enter -0-)		4,171,026.		
c Adjusted net income (if negative, enter -0-)			0.	



BAA For Paperwork Reduction Act Notice, see instructions.

TEEA0504L 12/16/16

Form 990-PF (2016)

966-69 (10)

SCANNED NOV 17 2017

Part II Balance Sheets		Beginning of year	End of year	
			(a) Book Value	(b) Book Value
ASSETS	1 Cash — non-interest-bearing	174,272.	826,272.	826,272.
	2 Savings and temporary cash investments	98,363.		
	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 sch)			
	Less: allowance for doubtful accounts			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	194,076.	175,649.	175,649.
	10a Investments — U.S. and state government obligations (attach schedule)			
	b Investments — corporate stock (attach schedule) STATEMENT 7	9,383,897.	10,052,422.	10,052,422.
	c Investments — corporate bonds (attach schedule) STATEMENT 8	4,140,267.	3,768,881.	3,768,881.
LIABILITIES	11 Investments — land, buildings, and equipment: basis			
	Less: accumulated depreciation (attach schedule)			
	12 Investments — mortgage loans			
	13 Investments — other (attach schedule) STATEMENT 9	121,859,650.	123,012,726.	123,012,726.
	14 Land, buildings, and equipment: basis 266,280.			
	Less: accumulated depreciation (attach schedule) SEE STMT 10 249,292.	25,067.	16,988.	16,988.
	15 Other assets (describe SEE STATEMENT 11)	3,872.	3,872.	3,872.
	16 Total assets (to be completed by all filers — see the instructions Also, see page 1, item I)	135,879,464.	137,856,810.	137,856,810.
	17 Accounts payable and accrued expenses	74,677.	59,232.	
	18 Grants payable	3,230,744.	2,480,923.	
NET ASSETS OR FUND BALANCES	19 Deferred revenue			
	20 Loans from officers, directors, trustees, & other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe)			
	23 Total liabilities (add lines 17 through 22)	3,305,421.	2,540,155.	
	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. <input checked="" type="checkbox"/>			
	24 Unrestricted	132,574,043.	135,316,655.	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. <input type="checkbox"/>			
	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 (see instructions)	132,574,043.	135,316,655.	
	31 Total liabilities and net assets/fund balances (see instructions)	135,879,464.	137,856,810.	

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	132,574,043.
2	Enter amount from Part I, line 27a	2	-1,679,015.
3	Other increases not included in line 2 (itemize) SEE STATEMENT 12	3	4,421,627.
4	Add lines 1, 2, and 3	4	135,316,655.
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	135,316,655.

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 shares MLC Company)		(b) How acquired P — Purchase D — Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1 a SEE STATEMENT 13				
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			
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			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	<div style="border: 1px solid black; padding: 2px;"> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div>	2	5,467,510.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):	<div style="border: 1px solid black; padding: 2px;"> If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 </div>	3	0.

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.

(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	6,724,390.	138,014,748.	0.048722
2014	6,521,069.	135,039,258.	0.048290
2013	6,757,283.	125,223,430.	0.053962
2012	6,724,091.	119,359,162.	0.056335
2011	5,969,076.	121,147,588.	0.049271

2 Total of line 1, column (d)	2	0.256580
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	0.051316
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	131,790,163.
5 Multiply line 4 by line 3	5	6,762,944.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	41,710.
7 Add lines 5 and 6	7	6,804,654.
8 Enter qualifying distributions from Part XII, line 4	8	7,081,331.

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)

1 a 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	41,710.
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	41,710.
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	41,710.
6 Credits/Payments:			
a 2016 estimated tax pmts and 2015 overpayment credited to 2016	6a	168,446.	
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	168,446.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	0.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	126,736.	
11 Enter the amount of line 10 to be: Credited to 2017 estimated tax 126,736. Refunded	11	0.	

Part VII-A Statements Regarding Activities

	Yes	No
1 a 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 \$ 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? <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
4 a 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?	X	
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	
8 a Enter the states to which the foundation reports or with which it is registered (see instructions) IL, MI		
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

BAA

Form 990-PF (2016)

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 <u>HTTP://WWW.RRF.ORG</u>	13	X
14 The books are in care of <u>IRENE FRYE</u> Telephone no. <u>1-773-714-8080</u> Located at <u>8765 W HIGGINS RD., STE 430 CHICAGO IL</u> ZIP + 4 <u>60631</u>		
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 <u>15</u>	N/A	N/A
16 At any time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	X

See the instructions for exceptions and filing requirements for FinCEN Form 114. 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
1 a 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 checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input checked="" type="checkbox"/> Yes <input 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 <input type="checkbox"/>	1 b	X
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?	1 c	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 <u>20__</u> , <u>20__</u> , <u>20__</u> , <u>20__</u>	<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)	2 b	N/A
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. <u>20__</u> , <u>20__</u> , <u>20__</u> , <u>20__</u>		
3 a 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)	3 b	N/A
4 a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4 a	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?	4 b	X

BAA

Form 990-PF (2016)

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 N/A

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 X

If 'Yes' to 6b, file Form 8870

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

SEE STATEMENT 14

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
SEE STATEMENT 15				
		431,621.	32,398.	0.

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

(a) Name and address of each employee paid more than \$50,000	(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
NANCY ZWEIBEL PHD C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	PROGRAM OFFIC 40	172,564.	24,510.	0.
JULIE KAUFMAN PHD C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	PROGRAM OFFIC 40	151,024.	22,440.	0.
MARY O'DONNELL C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	PROGRAM OFFIC 40	103,430.	14,037.	0.
LEE PARKER MED C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	GRANTS & IT A 40	83,782.	12,066.	0.
MARCIA KUNSTLER C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	OFFICE ADMINI 40	70,759.	10,380.	0.

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

1

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
GLOBAL ENDOWMENT MANAGEMENT 100 N TYRON ST CHARLOTTE, NC 28202	INVESTMENT MGMT	2,166,077.
NAOMI M STANHAUS 720 N LARABEE ST., #204 CHICAGO, IL 60654	PROGRAM CONSULTANT	116,003.
VAREY & VACCARIELLO CPS'S PC 2205 POINT BLVD #204 ELGIN, IL 60123	ACCOUNTING & TAX	64,265.
Total number of others receiving over \$50,000 for professional services		0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 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	0.

BAA

Form 990-PF (2016)

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	1 a	132,582,634.
b	Average of monthly cash balances	1 b	1,214,486.
c	Fair market value of all other assets (see instructions)	1 c	
d	Total (add lines 1a, b, and c)	1 d	133,797,120.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1 e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	133,797,120.
4	Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	2,006,957.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	131,790,163.
6	Minimum investment return. Enter 5% of line 5	6	6,589,508.

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	6,589,508.
2a	Tax on investment income for 2016 from Part VI, line 5	2 a	41,710.
b	Income tax for 2016 (This does not include the tax from Part VI)	2 b	
c	Add lines 2a and 2b	2 c	41,710.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	6,547,798.
4	Recoveries of amounts treated as qualifying distributions	4	176,464.
5	Add lines 3 and 4	5	6,724,262.
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	6,724,262.

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	1 a	7,073,561.
b	Program-related investments — total from Part IX-B	1 b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	7,770.
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3 a	
b	Cash distribution test (attach the required schedule)	3 b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	7,081,331.
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	41,710.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	7,039,621.

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				6,724,262.
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only			0.	
b Total for prior years 20 __, 20 __, 20 __		0.		
3 Excess distributions carryover, if any, to 2016.				
a From 2011	146,096.			
b From 2012	838,718.			
c From 2013	668,831.			
d From 2014	41,622.			
e From 2015				
f Total of lines 3a through e	1,695,267.			
4 Qualifying distributions for 2016 from Part XII, line 4. ► \$ 7,081,331.				
a Applied to 2015, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required — see instructions)		0.		
c Treated as distributions out of corpus (Election required — see instructions)	0.			
d Applied to 2016 distributable amount				6,724,262.
e Remaining amount distributed out of corpus	357,069.			
5 Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	2,052,336.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount — see instructions		0.		
e Undistributed income for 2015. Subtract line 4a from line 2a. Taxable amount — see instructions			0.	
f Undistributed income for 2016. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2017				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required — see instructions)	0.			
8 Excess distributions carryover from 2011 not applied on line 5 or line 7 (see instructions)	146,096.			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	1,906,240.			
10 Analysis of line 9				
a Excess from 2012	838,718.			
b Excess from 2013	668,831.			
c Excess from 2014	41,622.			
d Excess from 2015				
e Excess from 2016	357,069.			

Part XIV	Private Operating Foundations (see instructions and Part VII-A, question 9)
-----------------	------------------------------------------------------------------------------------

N/A

- [illegible]

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))
- 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 16

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

SEE STATEMENT FOR LINE 2A

- c Any submission deadlines.

SEE STATEMENT FOR LINE 2A

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

SEE STATEMENT FOR LINE 2A

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
<i>a Paid during the year</i>				
GRANTS PAID FOR GENERAL FUNDING	NONE	PC	SEE ATTACHMENT A	5,091,434.
MATCHING GIFTS PROGRAM	NONE	PC	SEE ATTACHMENT B	276,330.
Total				5,367,764.
<i>b Approved for future payment</i>				
GRANTS PAID TO GENERAL FUNDING	NONE	PC	SEE ATTACHMENT C	2,480,923.
Total				2,480,923.

Enter gross amounts unless otherwise indicated

(See worksheet in line 13 instructions to verify calculations)

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)

11A	UNSPENT GRANTS RETURNED BY GRANTEES.
-----	--------------------------------------

RETIREMENT RESEARCH FOUNDATION

36-2429540

STATEMENT 1
FORM 990-PF, PART I, LINE 11
OTHER INCOME

	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
K-1 ORDINARY & OTHER INC	\$ -306,550.	\$ -306,550.	
NON-TAXABLE INCOME	97,339.		
RETURNED GRANTS	176,464.		
UNRELATED BUSINESS INCOME	278,965.		
TOTAL	<u>\$ 246,218.</u>	<u>\$ -306,550.</u>	<u>\$ 0.</u>

STATEMENT 2
FORM 990-PF, PART I, LINE 16A
LEGAL FEES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
GENERAL CORPORATE MATTERS	\$ 427.			\$ 427.
TOTAL	<u>\$ 427.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>	<u>\$ 427.</u>

STATEMENT 3
FORM 990-PF, PART I, LINE 16B
ACCOUNTING FEES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
AUDITING FEES	\$ 18,400.	\$ 5,000.		\$ 12,400.
BOOKKEEPING, PAYROLL, AND TAX SERVICES	64,265.	25,340.		34,225.
TOTAL	<u>\$ 82,665.</u>	<u>\$ 30,340.</u>	<u>\$ 0.</u>	<u>\$ 46,625.</u>

STATEMENT 4
FORM 990-PF, PART I, LINE 16C
OTHER PROFESSIONAL FEES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT MANAGEMENT, GLOBAL ENDOW FD	\$ 2,166,077.	\$ 2,150,430.		
INVESTMENT MANAGEMENT, MID CONTINENT	50,900.	50,900.		
PROGRAM GRANT EVALUATION CONSULTANTS	124,748.			\$ 124,748.
TOTAL	<u>\$ 2,341,725.</u>	<u>\$ 2,201,330.</u>	<u>\$ 0.</u>	<u>\$ 124,748.</u>

RETIREMENT RESEARCH FOUNDATION

36-2429540

STATEMENT 5
FORM 990-PF, PART I, LINE 18
TAXES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
EXCISE TAX	\$ 41,710.			
TAX ON FOREIGN DIVIDENDS	142,054.	\$ 142,054.		
TOTAL	\$ 183,764.	\$ 142,054.	\$ 0.	\$ 0.

STATEMENT 6
FORM 990-PF, PART I, LINE 23
OTHER EXPENSES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
COMPUTER EXPENSE	\$ 62,234.			\$ 62,234.
DUES & MEMBERSHIPS	13,369.			13,369.
INSURANCE	25,279.	\$ 2,528.		22,750.
OFFICE SUPPLIES & EXPENSE	15,909.	1,130.		14,779.
POSTAGE & SHIPPING	1,704.	170.		1,535.
TOTAL	\$ 118,495.	\$ 3,828.	\$ 0.	\$ 114,667.

STATEMENT 7
FORM 990-PF, PART II, LINE 10B
INVESTMENTS - CORPORATE STOCKS

CORPORATE STOCKS	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
MID-CONTINENT CAPITAL - ETF'S	MKT VAL	\$ 10,052,422.	\$ 10,052,422.
	TOTAL	\$ 10,052,422.	\$ 10,052,422.

STATEMENT 8
FORM 990-PF, PART II, LINE 10C
INVESTMENTS - CORPORATE BONDS

CORPORATE BONDS	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
MID-CONTINENT CAPITAL - CORPORATE BONDS	MKT VAL	\$ 3,768,881.	\$ 3,768,881.
	TOTAL	\$ 3,768,881.	\$ 3,768,881.

RETIREMENT RESEARCH FOUNDATION

36-2429540

STATEMENT 9
FORM 990-PF, PART II, LINE 13
INVESTMENTS - OTHER

	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
<u>OTHER INVESTMENTS</u>			
GLOBAL ENDOWMENT FUND II LP	MKT VAL	\$ 123012726.	\$123,012,726.
	TOTAL	<u>\$ 123012726.</u>	<u>\$123,012,726.</u>

STATEMENT 10
FORM 990-PF, PART II, LINE 14
LAND, BUILDINGS, AND EQUIPMENT

CATEGORY	BASIS	ACCUM. DEPREC.	BOOK VALUE	FAIR MARKET VALUE
FURNITURE AND FIXTURES	\$ 94,186.	\$ 85,411.	\$ 8,775.	\$ 8,775.
MACHINERY AND EQUIPMENT	172,094.	163,881.	8,213.	8,213.
TOTAL	<u>\$ 266,280.</u>	<u>\$ 249,292.</u>	<u>\$ 16,988.</u>	<u>\$ 16,988.</u>

STATEMENT 11
FORM 990-PF, PART II, LINE 15
OTHER ASSETS

	BOOK VALUE	FAIR MARKET VALUE
SUNDRY	\$ 3,872.	\$ 3,872.
TOTAL	<u>\$ 3,872.</u>	<u>\$ 3,872.</u>

STATEMENT 12
FORM 990-PF, PART III, LINE 3
OTHER INCREASES

NET UNREALIZED GAINS OR LOSSES ON INVESTMENTS	TOTAL	<u>\$ 4,421,627.</u>
		<u>\$ 4,421,627.</u>

STATEMENT 13
FORM 990-PF, PART IV, LINE 1
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

ITEM	(A) DESCRIPTION	(B) HOW ACQUIRED	(C) DATE ACQUIRED	(D) DATE SOLD
1	FROM FORM K-1 GLOBAL ENDOWMENT FUND II	PURCHASED		
2	FROM FORM K-1 GLOBAL ENDOWMENT FUND II	PURCHASED		
3	FROM FORM K-1 GLOBAL ENDOWMENT FUND II	PURCHASED		
4	FROM FORM K-1 GLOBAL ENDOWMENT FUND II	PURCHASED		
5	FROM FORM K-1 GLOBAL ENDOWMENT FUND II	PURCHASED		

RETIREMENT RESEARCH FOUNDATION

36-2429540

STATEMENT 13 (CONTINUED)
FORM 990-PF, PART IV, LINE 1
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

ITEM	(A) DESCRIPTION	(B) HOW ACQUIRED	(C) DATE ACQUIRED	(D) DATE SOLD
6	MANAGED TRADES FROM MCC CAPITAL MGMT	PURCHASED		
7	MANAGED TRADES FROM MCC CAPITAL MGMT	PURCHASED		
8	LITIGATION PROCEEDS FROM PAST TRADES	PURCHASED		
9	FROM FORM K-1 GLOBAL ENDOWMENT FUND II	PURCHASED		
10	FROM FORM K-1 GLOBAL ENDOWMENT FUND II	PURCHASED		

ITEM	(E) GROSS SALES	(F) DEPREC. ALLOWED	(G) COST BASIS	(H) GAIN (LOSS)	(I) FMV 12/31/69	(J) ADJ. BAS. 12/31/69	(K) EXCESS (I) - (J)	(L) GAIN (LOSS)
1	473,861.		0.	473,861.				\$ 473,861.
2	437,181.		0.	437,181.				437,181.
3	270,491.		0.	270,491.				270,491.
4	-15,366.		0.	-15,366.				-15,366.
5	1,350.		0.	1,350.				1,350.
6	46,858.		0.	46,858.				46,858.
7	104,945.		0.	104,945.				104,945.
8	1,082.		0.	1,082.				1,082.
9	-24,398.		0.	-24,398.				-24,398.
10	236,876.		0.	236,876.				236,876.
TOTAL								\$ 546,751.

STATEMENT 14
FORM 990-PF, PART VIII
COMPENSATION EXPLANATION

DOWNEY R VAREY

MR VAREY'S COMPENSATION AS TRUSTEE FOR THE YEAR ENDED 12/31/16 TOTALED \$21,500. MR. VAREY ALSO IS A PARTNER IN THE ACCOUNTING FIRM OF VAREY & VACCARIELLO CPA'S PC, WHICH THE FOUNDATION PAID ACCOUNTING, CONSULTING AND TAX RELATED FEES TOTALING \$64,265 FOR THE YEAR ENDED 12/31/16. ALL OF THOSE SERVICES TO THE FOUNDATION WERE PROVIDED BY MR. VAREY, AND HE WAS COMPENSATED BY THE ACCOUNTING FIRM FOR THEM.

STATEMENT 15
FORM 990-PF, PART VIII, LINE 1
LIST OF OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED	COMPEN- SATION	CONTRI- BUTION TO EBP & DC	EXPENSE ACCOUNT/ OTHER
NATHANIEL MCFARLAND, MD C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	CHAIRMAN 9.00	\$ 34,000.	\$ 0.	\$ 0.
RUTH ANN WATKINS C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	TRUSTEE 6.00	26,000.	0.	0.

RETIREMENT RESEARCH FOUNDATION

36-2429540

STATEMENT 15 (CONTINUED)
FORM 990-PF, PART VIII, LINE 1
LIST OF OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED	COMPEN- SATION	CONTRI- BUTION TO EBP & DC	EXPENSE ACCOUNT/ OTHER
MICHAEL J STARSHAK C/O RRF 8765 W HIGGINS CHICAGO, IL 60631	SECRETARY 6.00	\$ 26,000.	\$ 0.	\$ 0.
DOWNEY R VAREY C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	TREASURER 6.00	21,500.	0.	0.
IRENE FRYE C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	PRESIDENT 40.00	218,121.	32,398.	0.
MARILYN HENNESSY C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	TRUSTEE 6.00	21,500.	0.	0.
THOMAS R PROHASKA, PH D C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	TRUSTEE 6.00	21,500.	0.	0.
CHERYL E WOODSON, MD C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	TRUSTEE 6.00	21,500.	0.	0.
KATHLEEN W KOLODGY C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	TRUSTEE 6.00	20,000.	0.	0.
THOMAS D KUCZMARSKI C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	TRUSTEE 6.00	21,500.	0.	0.
TOTAL		\$ 431,621.	\$ 32,398.	\$ 0.

STATEMENT 16
FORM 990-PF, PART XV, LINE 2A-D
APPLICATION SUBMISSION INFORMATION

NAME OF GRANT PROGRAM:	
NAME:	IRENE FRYE PRESIDENT
CARE OF:	RETIREMENT RESEARCH FOUNDATION
STREET ADDRESS:	8765 W HIGGINS ROAD, STE 430
CITY, STATE, ZIP CODE:	CHICAGO, IL 60631-4022
TELEPHONE:	773-714-8080
E-MAIL ADDRESS:	FRYE@RRF.ORG
FORM AND CONTENT:	OUR WEBSITE WWW.RRF.ORG CONTAINS THE FORM IN WHICH APPLICATIONS SHOULD BE SUBMITTED ALONG WITH ELIGIBILITY CRITERIA, EXCLUSIONS, AND LETTERS OF INQUIRY WITH REQUIRED INCLUSIONS. WEB INQUIRIES SHOULD BE ADDRESSED TO INFO@RRF.ORG. APPLICATION FORMS CAN BE DOWNLOADED IN WORD FOR COMPLETION.

STATEMENT 16 (CONTINUED)
FORM 990-PF, PART XV, LINE 2A-D
APPLICATION SUBMISSION INFORMATION

SUBMISSION DEADLINES: FEBRUARY 1, MAY 1, AND AUGUST 1
RESTRICTIONS ON AWARDS: OUR WEBSITE WWW.RRF.ORG CONTAINS THE ELIGIBILITY
REQUIREMENTS, RESTRICTIONS OR LIMITATIONS FOR ALL MAJOR
GRANT PROGRAMS. THE MAJOR GRANT PROGRAMS ARE AS FOLLOWS:
ADVOCACY; DIRECT SERVICE; PROFESSIONAL EDUCATION;
RESEARCH; ORGANIZATIONAL CAPACITY BUILDING STANDARD
GRANTS; ORGANIZATIONAL CAPACITY BUILDING FLEX-FUND GRANTS
AND ACCESSIBLE FAITH GRANTS.

Retirement Research Foundation
Chicago, IL.
Form 990PF For The Year Ended 12-31-16 Page 11 Part XV Line 3a
36-2429540

ATTACHMENT A

Request ID	Recipient Name and Address	Relationship	Foundation Status of Recipient	Purpose of Grant	Amount
	Advocates for Basic Legal Equality, Inc.				
2016131	Advocates for Basic Legal Equality, Inc 525 Jefferson Avenue Suite 300 Toledo, OH 43604-1373	NONE	PC	A one-year grant to provide legal services and engage in system advocacy to assist seniors to access appropriate healthcare coverage	\$40,260
	AgeOptions, Inc.				
2015214	AgeOptions, Inc 1048 West Lake Street, Suite 300 Oak Park, Illinois 60301-1102	NONE	PC	A one-year grant to build the capacity of Illinois service providers and advocates, ensuring that older adults will have access to the most appropriate and affordable healthcare coverage	\$55,000
2015214	AgeOptions, Inc 1048 West Lake Street, Suite 300 Oak Park Illinois 60301-1102	NONE	PC	A one-year grant to build the capacity of Illinois service providers and advocates, ensuring that older adults will have access to the most appropriate and affordable healthcare coverage	\$60,000
2016029	AgeOptions, Inc 1048 West Lake Street Suite 300 Oak Park, Illinois 60301-1102	NONE	PC	A one-year grant to continue a culturally competent caregiver support program through a network of local churches	\$35,000
	Aging Care Connections				
2016245	Aging Care Connections 111 West Harris Avenue La Grange, Illinois 60525	NONE	PC	A one-month matching grant in conjunction with IL Give 2016	\$5,000
	Alliance for Aging Research				
2016225	Alliance for Aging Research 1700 K Street, NW, Suite 740 Washington, DC 20006	NONE	PC	A one-year grant for membership support	\$30,000
	American Bar Association Fund for Justice and Education				
2015233	American Bar Association Fund for Justice and Education 1050 Connecticut Ave NW Suite 400 Washington, DC 20036	NONE	PC	An 18-month grant to develop recommendations for clinical practice, hospital policy, and state law for treatment of seriously ill patients without guardians or advance directives	\$67,000
2015233	American Bar Association Fund for Justice and Education 1050 Connecticut Ave NW,	NONE	PC	An 18-month grant to develop recommendations for clinical practice, hospital policy and state	\$70,263

Retirement Research Foundation
Chicago, IL.
Form 990PF For The Year Ended 12-31-16 Page 11 Part XV Line 3a
36-2429540

ATTACHMENT A

	Suite 400			law for treatment of seriously ill patients without	
	Washington, DC 20036			guardians or advance directives	
	American College of Cardiology Foundation				
2015184	American College of Cardiology Foundation	NONE	PC	A 28-month grant to disseminate the curriculum	\$70,000
	Heart House			Essentials of Cardiovascular Care for Older	
	2400 N Street, NW			Adults to nearly 12,000 health professionals in	
	Washington			10 states, to improve care of older adults with	
	District of Columbia 20037			cardiovascular disease	
2015184	American College of Cardiology Foundation	NONE	PC	A 28-month grant to disseminate the curriculum	\$90,000
	Heart House			Essentials of Cardiovascular Care for Older	
	2400 N Street, NW			Adults to nearly 12,000 health professionals in	
	Washington			10 states, to improve care of older adults with	
	District of Columbia 20037			cardiovascular disease	
	American Geriatrics Society				
2016040	American Geriatrics Society	NONE	PC	A one-year grant for advocacy to improve	\$25,000
	40 Fulton Street, 18th Floor			physician reimbursement for care management	
	New York, New York 10038			of older adults with multiple chronic conditions	
	American Public Health Association				
2008070	American Public Health Association	NONE	PC	A ten-year grant (\$6,000 each year) for awards	\$6,000
	800 I Street, N W			to six students annually for research excellence	
	Washington, DC 20001-3710			in gerontological health	

Retirement Research Foundation
Chicago, IL.
Form 990PF For The Year Ended 12-31-16 Page 11 Part XV Line 3a
38-2429540

ATTACHMENT A

Arab American Family Services				
2016074	Arab American Family Services 9044 South Octavia Avenue Bridgeview, Illinois 60455	NONE	PC	A six-month grant as partial support for a strategic planning process
				\$5,000
2016246	Arab American Family Services 9044 South Octavia Avenue Bridgeview, Illinois 60455	NONE	PC	A one-month matching grant in conjunction with IL Give 2016
				\$5,000
Bellarmino Jesuit Retreat House				
2016179	Bellarmino Jesuit Retreat House 420 West County Line Road Barrington, Illinois 60010-4043	NONE	PC	A one-year grant to conduct day-long spirituality programs at Bellarmine Jesuit Retreat House on topics of interest and relevance for an aging population
				\$7,500
Benedictine Sisters of Chicago-St. Scholastica Monastery				
2016238	Benedictine Sisters of Chicago-St. Scholastica Monastery 7430 North Ridge Boulevard Chicago, Illinois 60645-1913	NONE	PC	A one-month matching grant in conjunction with IL Give 2016
				\$5,000
Benjamin Rose Institute on Aging				
2016003	Benjamin Rose Institute on Aging 11890 Fairhill Road Cleveland, Ohio 44120-1053	NONE	PC	A two-year grant for a randomized clinical trial testing the impact of the SHARE intervention on older adults with chronic conditions and their informal caregivers
				\$88,268
Bethlehem Evangelical Lutheran Church				
2014166	Bethlehem Evangelical Lutheran Church 1145 N. 5th Avenue P.O. Box 3850 St. Charles, Illinois 60174-9085	NONE	PC	An eighteen-month grant to construct a concrete entrance ramp and remodel the entrance to provide accessibility
Bickerdike Redevelopment Corporation				
2016212	Bickerdike Redevelopment Corporation 2550 West North Avenue Chicago, Illinois 60647	NONE	PC	A second-year grant of support to continue expanding a program offering home repairs to seniors on the Northwest side of Chicago
				\$30,000

Retirement Research Foundation
Chicago, IL.
Form 990PF For The Year Ended 12-31-16 Page 11 Part XV Line 3a
36-2429540

ATTACHMENT A

Blue River Services Inc.					
2015083	Blue River Services Inc	NONE	PC	A one-year grant to coordinate services for low-income residents of a senior housing facility	\$15,000
	1365 Old Highway 135 NW				
	P O Box 547				
	Corydon, Indiana 47112				
Brown University					
2016016	Brown University	NONE	PC	A five-month grant to create an implementation guide for an individualized music therapy program, MUSIC & MEMORY, to enable outcomes research and maximize program benefit	\$69,051
	Office of Sponsored Projects				
	Box 1929, 164 Angell Street				
	Providence, Rhode Island				
	02912-9002				
Cambodian Association of Illinois					
2016240	Cambodian Association of Illinois	NONE	PC	A one month matching grant in conjunction with IL Give 2016	\$5,000
	2831 West Lawrence Avenue				
	Chicago, Illinois 60625				
Cambodian Association of Illinois					
2016240	Cambodian Association of Illinois	NONE	PC	A one month matching grant in conjunction with IL Give 2016	-\$5,000
	2831 West Lawrence Avenue				
	Chicago, Illinois 60625				
Catholic Charities of the Archdiocese of Chicago					
2016252	Catholic Charities of the Archdiocese of Chicago	NONE	PC	A one month matching grant in conjunction with IL Give 2016	\$5,000
	Saint Vincent Center				
	721 North LaSalle Street				
	Chicago, Illinois 60654-3503				
Centegra Hospital - McHenry					
2015059	Centegra Hospital - McHenry	NONE	PC	A one-year grant to help older patients suffering from chronic disease through the use of a new telehealth program	
	4201 Medical Center Drive				
	McHenry, Illinois 60050				

Retirement Research Foundation
Chicago, IL
Form 990PF For Tho Year Ended 12-31-16 Page 11 Part XV Line 3a
36-2429540

ATTACHMENT A

Center for Community Change					
2015228	Center for Community Change	NONE	PC	A one-year grant to launch a structured Leadership Cross-Training Program focused on the issues faced by senior residents who are owners of manufactured homes	\$25,000
	1536 U Street NW				
	Washington, DC 20009				
2015228	Center for Community Change	NONE	PC	A one-year grant to launch a structured Leadership Cross-Training Program focused on the issues faced by senior residents who are owners of manufactured homes	\$25,000
	1536 U Street NW				
	Washington, DC 20009				
Center for Disability and Elder Law, Inc.					
2016236	Center for Disability and Elder Law, Inc	NONE	PC	A one-month matching grant in conjunction with IL Give 2016	\$5,000
	205 W Randolph, Suite 1610				
	Chicago, Illinois 60606				
Center for Independent Living in Central Florida, Inc.					
2015211	Center for Independent Living in Central Florida, Inc	NONE	PC	A one-year grant to provide equipment and modifications to seniors with disabilities on a waiting list, to help them live independently in	\$27,299
	720 N Denning Drive				
	Winter Park, Florida 32789				
Center of Concern					
2016122	Center of Concern	NONE	PC	A one-year grant for a senior helpline that will allow older adults and caregivers 24-hour online and telephone access to information and resources	\$36,850
	1580 N Northwest Highway,				
	#310				
	Park Ridge, Illinois 60068				
2016231	Center of Concern	NONE	PC	A one-month matching grant in conjunction with IL Give 2016	\$5,000
	1580 N Northwest Highway,				
	#310				
	Park Ridge Illinois 60068				

Retirement Research Foundation
Chicago, IL.
Form 990PF For The Year Ended 12-31-16 Page 11 Part XV Line 3a
36-2429540

ATTACHMENT A

	<u>Chicago Coalition to Save Our Mental Health Centers</u>				
2016065	Chicago Coalition to Save Our Mental Health Centers	NONE	PC	A one-year grant to continue increasing and improving access to mental health services for seniors	\$29,700
	5750 W Irving Park Road				
	Chicago, Illinois 60634				
	<u>Chicago Public Library Foundation</u>				
2016223	Chicago Public Library Foundation	NONE	PC	A one-year grant to improve the capacity of the CyberNavigator program to serve older adults better	\$60,000
	20 N Michigan Avenue,				
	Suite 520				
	Chicago, Illinois 60602				
	<u>Chicagoland Methodist Senior Services</u>				
2016216	Chicagoland Methodist Senior Services	NONE	PC	A six-month grant to engage a consultant as the organization enters into preliminary planning around a potential business ventures with another nonprofit service provider	\$5,000
	1415 W Foster				
	Chicago, Illinois 60640				
	<u>Chinese American Service League, Inc.</u>				
2016017	Chinese American Service League, Inc	NONE	PC	A one-year grant to implement Enhance Fitness, an evidence-based exercise program for older adults	\$21,638
	2141 S Tan Court				
	Chicago, Illinois 60616				
2016254	Chinese American Service League, Inc	NONE	PC	A one-month matching grant in conjunction with IL Give 2016	\$5,000
	2141 S Tan Court				
	Chicago, Illinois 60616				
	<u>Chinese Mutual Aid Association</u>				
2016249	Chinese Mutual Aid Association	NONE	PC	A one-month matching grant in conjunction with IL Give 2016	\$5,000
	1016 West Argyle Street				
	Chicago, Illinois 60640				

Retirement Research Foundation
Chicago, IL.
Form 990PF For The Year Ended 12-31-16 Page 11 Part XV Line 3a
36-2429540

ATTACHMENT A

CJE SeniorLife					
2015192	CJE SeniorLife 3003 W Touhy Avenue Chicago, Illinois 60645	NONE	PC	A one-year grant to the expand the agency's scope of disease prevention and self-management programs for older adults through additional offerings and organizational partnerships	\$49,121
2016250	CJE SeniorLife 3003 W Touhy Avenue Chicago, Illinois 60645	NONE	PC	A one-month matching grant in conjunction with IL Give 2016	\$5,000
Coalition of Limited English Speaking Elderly					
2015166	Coalition of Limited English Speaking Elderly 53 W Jackson Blvd , Suite 1340 Chicago Illinois 60604	NONE	PC	A three-year grant to continue its assistance to Community Care Provider agencies, helping ethnic elders make informed choices when enrolling in Illinois managed care programs	\$35,000
Community Adult Day Care					
2016068	Community Adult Day Care 4501 Main Street Downers Grove Illinois 60515	NONE	PC	A six-month grant to engage in an organizational assessment to prioritize capacity building needs and opportunities	\$3,300
Corporation for Supportive Housing					
2015181	Corporation for Supportive Housing 61 Broadway 23rd floor New York, New York 10006	NONE	PC	A one-year grant for advocacy efforts to end homelessness for older adults and improve the quality of care for aging supportive housing tenants	\$46,610
Council on Aging of Martin County, Inc.					
2015226	Council on Aging of Martin County, Inc 900 SE Salerno Road Stuart, Florida 34997	NONE	PC	A one-year grant to add Home Care Medicine to its primary medical care clinic	\$65,000
2015226	Council on Aging of Martin County, Inc 900 SE Salerno Road Stuart Florida 34997	NONE	PC	A one-year grant to add Home Care Medicine to its primary medical care clinic	\$58,750

Retirement Research Foundation
Chicago, IL.
Form 990PF For The Year Ended 12-31-16 Page 11 Part XV Line 3a
36-2429540

ATTACHMENT A

	Council on Foundations				
2016080	Council on Foundations 2121 Crystal Drive Suite 700 Arlington, Virginia 22202	NONE	PC	A one-year grant for 2016 program support	\$17,900
	Dental Lifeline Network				
2016009	Dental Lifeline Network 1800 15th Street, Unit 100 Denver, Colorado 80202	NONE	PC	A four-month grant to gather clinical guidelines on medical therapies to justify and advocate for the Center for Medicare and Medicaid Services to exempt "medically necessary dental care" from the coverage exclusion of essentially all dental care	\$35,000
	ElderCARE@ChristChurch				
2015087	ElderCARE@ChristChurch 410 Grand Avenue Waukegan, Illinois 60085	NONE	PC	A one-year grant to expand a transportation program for low-income older adults by developing and implementing an outreach plan	\$20,000
2016242	ElderCARE@ChristChurch 410 Grand Avenue Waukegan, Illinois 60085	NONE	PC	A one-month matching grant in conjunction with IL Give 2016	\$5,000
	Elderday Center, Inc.				
2016253	Elderday Center, Inc. 328 W. Wilson Street Batavia, Illinois 60510	NONE	PC	A one-month matching grant in conjunction with IL Give 2016	\$3,150
	Family Alliance, Inc.				
2015075	Family Alliance, Inc. 2028 North Seminary Avenue Woodstock, Illinois 60098	NONE	PC	A one-year grant to expand its adult day program to a second site in Huntley, Illinois	\$25,000
2016232	Family Alliance, Inc. 2028 North Seminary Avenue Woodstock, Illinois 60098	NONE	PC	A one-month matching grant in conjunction with IL Give 2016	\$5,000
	Florida State University Research Foundation, Inc.				
2015121	Florida State University Research Foundation, Inc. 2000 Levy Avenue, Suite 351	NONE	PC	A 15-month grant to develop, field test, and disseminate continuing education modules	\$38,817

Retirement Research Foundation
Chicago, IL.
Form 990PF For The Year Ended 12-31-16 Page 11 Part XV Line 3a
36-2429540

ATTACHMENT A

	Tallahassee, Florida 32310-5782			aimed to improve methods of physician/attorney collaboration in behalf of older individuals	
	Ford Heights Community Service Organization Inc.				
2016164	Ford Heights Community Service Organization Inc 943 East Lincoln Highway Ford Heights, Illinois 60411	NONE	PC	A third-year grant in support of its Senior Wellness & Education Lifestyles program, which helps low-income older adults have healthier lifestyles by addressing food insecurity, chronic heart disease, diabetes, and obesity	\$10,000
	Forefront				
2016004	Forefront 208 S Lasalle Suite 1540 Chicago, Illinois 60604	NONE	PC	A one-year grant for 2016 program support (\$11,926 is a membership grant and \$850 is charged to administrative expenses for a total of \$12,776)	\$11,926
2016075	Forefront 208 S Lasalle Suite 1540 Chicago, Illinois 60604	NONE	PC	A one-year grant toward a funder collaborative aimed at raising awareness about the Illinois budget impasse and funding cuts that hurt nonprofits serving the state's most vulnerable residents, including older adults	\$10,000
	Generations United				
2016098	Generations United 25 E Street, NW - 3rd floor Suite 900 Washington, DC 20001	NONE	PC	A one-year grant for a collaborative study on intergenerational programming provided in senior housing	\$47,968
	Gerontological Society of America				
2016125	Gerontological Society of America 1220 L Street NW, Suite 901 Washington, DC 20005	NONE	PC	A nine-month grant to educate journalists about new scientific findings, social and policy debates, and innovations and solutions for key aging-related issues	\$15,000

Retirement Research Foundation
Chicago, IL.
Form 990PF For The Year Ended 12-31-16 Page 11 Part XV Line 3a
36-2429540

ATTACHMENT A

Grantmakers In Aging					
2015073	Grantmakers In Aging	NONE	PC	An 18-month grant to continue a collaborative project involving eight national aging organizations that are conducting research to help reframe the perception of aging in America	\$50,000
	2001 Jefferson Davis Highway, Suite 504				
	Arlington, Virginia 22202				
Grantmakers In Aging					
2016220	Grantmakers In Aging	NONE	PC	A one-year grant in support of educational efforts to advance aging philanthropy across the country	\$15,000
	2001 Jefferson Davis Highway, Suite 504				
	Arlington, Virginia 22202				
Grantmakers In Health					
2016221	Grantmakers In Health	NONE	PC	A one-year grant for 2016 membership support	\$2,875
	1100 Connecticut Ave , N W , Suite 1200				
	Washington, DC 20036-4110				
Great Lakes Inter-Tribal Council, Inc.					
2015230	Great Lakes Inter-Tribal Council, Inc.	NONE	PC	A one-year grant to provide respite, resources and referrals to grandparents raising grandchildren on the Lac du Flambeau Chippewa Reservation	
	Volunteers Supporting Grandparents Raising Grandchildren Program				
	c/o GLITC, P O Box 9				
	Lac du Flambeau, Wisconsin 54538				
Hanul Family Alliance					
2016228	Hanul Family Alliance	NONE	PC	A one-month matching grant in conjunction with IL Give 2016	\$5,000
	5008 North Kedzie Avenue				
	Chicago Illinois 60625				
Heart2Heart Senior Outreach of South Florida					
2015107	Heart2Heart Senior Outreach of South Florida	NONE	PC	A one-year grant to expand a friendly visitor program for isolated elders in skilled nursing facilities	\$22,130
	2701 West Cypress Creek Road				
	Fort Lauderdale, Florida				
	33309				

Retirement Research Foundation
Chicago, IL.
Form 990PF For The Year Ended 12-31-16 Page 11 Part XV Line 3a
36-2429540

ATTACHMENT A

<u>Holsten Human Capital Development, NFP</u>					
2015058	Holsten Human Capital Development, NFP	NONE	PC	A second-year grant to support a full-time	\$23,639
	1034 W Montrose			bilingual Resident Service Assistant to provide	
	Chicago, Illinois 60613			case management, referral support, service	
				coordination, and translation services to	
				Chinese-speaking seniors at Hilliard Senior	
				Apartments	
<u>HOPE Fair Housing Center</u>					
2015207	HOPE Fair Housing Center	NONE	PC	An 18 month grant to train service providers	\$25,000
	245 W Roosevelt Road			about fair housing to protect the rights of older	
	Building 15, Suite 107			adults	
	West Chicago, Illinois 60185				
2015207	HOPE Fair Housing Center	NONE	PC	An 18 month grant to train service providers	\$16,533
	245 W Roosevelt Road			about fair housing to protect the rights of older	
	Building 15, Suite 107			adults	
	West Chicago Illinois 60185				
<u>Hospice of the Florida Suncoast</u>					
2016097	Hospice of the Florida Suncoast	NONE	PC	A second-year grant of support to ensure	\$39,300
	5771 Roosevelt Blvd, #700			seniors and their caregivers recognize hospice	
	Clearwater, Florida 33760			as an option for care at end-of- life and assist	
				physicians to make timely referrals of older	
				patients to hospice care	
<u>Housing Opportunities and Maintenance for the Elderly</u>					
2015052	Housing Opportunities and Maintenance for the Elderly	NONE	PC	A one-year grant to strengthen its program that	\$30,000
	1419 West Carroll Avenue,			assists low- and moderate-income seniors with	
	FL 2			moving services	
	Chicago, Illinois 60607-1149				
2016241	Housing Opportunities and Maintenance for the Elderly	NONE	PC	A one-month matching grant in conjunction with	\$5,000
	1419 West Carroll Avenue,			IL Give 2016	
	FL 2				
	Chicago, Illinois 60607-1149				

Retirement Research Foundation
Chicago, IL.
Form 990PF For The Year Ended 12-31-16 Page 11 Part XV Line 3a
36-2429540

ATTACHMENT A

Hyde Park Union Church				
2013149	Hyde Park Union Church 5600 South Woodlawn Avenue Chicago, Illinois 60637	NONE	PC	An eighteen-month grant to install elevator in education building
Illinois Partners for Human Service				
2016060	Illinois Partners for Human Service 310 South Peoria Street Suite 404 Chicago, Illinois 60607	NONE	PC	A one-year grant to continue advocacy efforts on state funding for older adult programs ensure preservation of current services for older adults transitioning to Medicaid Managed Care, and enhance accountability for decision making about senior services
Indiana University				
2016086	Indiana University Office of Research Administration 980 Indiana Avenue, Lockefield 2232 Indianapolis, Indiana 46202-2915	NONE	PC	A two-year grant to compare the quality of end-of-life care planning in Indiana nursing facilities using and not using the POLST Paradigm
Jane Addams Senior Caucus				
2015237	Jane Addams Senior Caucus 1111 N. Wells Street, Suite 302 Chicago, Illinois 60610	NONE	PC	A one-year grant to design and begin implementing an individual giving program
2016229	Jane Addams Senior Caucus 1111 N. Wells Street, Suite 302 Chicago, Illinois 60610	NONE	PC	A one-month matching grant in conjunction with IL Give 2016
Jewish Family & Career Services				
2016045	Jewish Family & Career Services 2821 Kiempner Way Louisville, Kentucky 40205	NONE	PC	A one-year grant for a pilot program on workforce development, to meet the needs of financially vulnerable older adults

Retirement Research Foundation
Chicago, IL.
Form 990PF For The Year Ended 12-31-16 Page 11 Part XV Line 3a
36-2429540

ATTACHMENT A

Jewish Family & Community Services of Southwest Florida					
2015182	Jewish Family & Community Services of Southwest Florida 5025 Castello Dr Suite 101 Naples, Florida 34103	NONE	PC	A one-year grant to provide case management services to individuals with Alzheimer's disease and related dementia, and to their caregivers	\$40,000
John Marshall Law School					
2016178	John Marshall Law School 315 South Plymouth Court Chicago, Illinois 60604	NONE	PC	A one-year grant to provide educational workshops on reverse mortgages	\$34,202
Johns Hopkins University					
2005191	Johns Hopkins University 525 N Wolfe Street Suite 316 Baltimore, Maryland 21205	NONE	PC	One-year grant for the first year of a five-year longitudinal study evaluating the health promotion effects of the Experience Corps on its older adult volunteers	
2016073	Johns Hopkins University 525 N Wolfe Street Suite 316 Baltimore, Maryland 21205	NONE	PC	A second-year grant to continue the RRF Scholars Program in Behavioral Intervention Research to teach and mentor scholars in new ways of developing, testing and implementing Novel interventions to improve mental health and well-being in older adults	\$20,000
JourneyCare					
2015077	JourneyCare 833 West Chicago Avenue Chicago, Illinois 60642	NONE	PC	A one-year grant to support the merger of three nonprofit hospices into a single nonprofit, to improve cost-effective, high-quality care	\$35,000
Justice In Aging					
2015010	Justice In Aging 1444 Eye Street, NW, Suite 1100 Washington DC 20005	NONE	PC	A one-year grant to continue advocacy work in states transitioning to Managed care for funding community-based long-term care for low-income, frail elders	\$35,000
2016047	Justice In Aging 1444 Eye Street, NW, Suite 1100 Washington, DC 20005	NONE	PC	A one-year grant for advocacy to end the illegal practice of billing older adults for costs of health services above what insurers will cover	\$45,000

Retirement Research Foundation
Chicago, IL.
Form 990PF For The Year Ended 12-31-16 Page 11 Part XV Line 3a
36-2429540

ATTACHMENT A

Korean American Community Services					
2015199	Korean American Community Services 4300 North California Avenue Chicago, Illinois 60618-1514	NONE	PC	A one-year grant to educate the Korean American community about Alzheimer's disease and other dementias	\$40,000
2016243	Korean American Community Services 4300 North California Avenue Chicago, Illinois 60618-1514	NONE	PC	A one-month matching grant in conjunction with IL Give 2016	\$4,910
Latino Alzheimer's and Memory Disorders Alliance					
2015243	Latino Alzheimer's and Memory Disorders Alliance 1600 West Lake Street Melrose Park, Illinois 60106	NONE	PC	A one-year grant to increase the organization's staffing infrastructure to allow for more effective program evaluation and organizational	\$36,630
2016248	Latino Alzheimer's and Memory Disorders Alliance 1600 West Lake Street Melrose Park, Illinois 60106	NONE	PC	A one-month matching grant in conjunction with IL Give 2016	\$5,000
LeadingAge					
2015060	LeadingAge 2519 Connecticut Avenue, NW Washington, DC 20008-1520	NONE	PC	An 18 month grant to evaluate a state Medicaid department incentive program to facilitate adoption of person- centered care through culture change in Kansas nursing homes	\$74,776
Lincoln Park Village, Inc.					
2016244	Lincoln Park Village, Inc. 2502 N Clark Street, #225 Chicago, Illinois 60614	NONE	PC	A one-month matching grant in conjunction with IL Give 2016	\$5,000
Little Brothers - Friends of the Elderly					
2016133	Little Brothers - Friends of the Elderly 355 North Ashland Avenue Chicago, Illinois 60607	NONE	PC	A five-month grant to strengthen fundraising efforts	\$55,000
2016251	Little Brothers - Friends of the Elderly 355 North Ashland Avenue Chicago, Illinois 60607	NONE	PC	A one-month matching grant in conjunction with IL Give 2016	\$5,000

Retirement Research Foundation
Chicago, IL.
Form 990PF For The Year Ended 12-31-16 Page 11 Part XV Line 3a
36-2429540

ATTACHMENT A

Little Sisters of the Poor, St. Joseph's Home for the Elderly					
2016156	Little Sisters of the Poor, St. Joseph's Home for the Elderly	NONE	PC	A one-year grant to install It's Never 2 Late (IN2L) and train staff to use this program to reduce the use of psychotropic drugs and improve quality of life among the elderly	\$25,973
	80 West Northwest Highway				
	Palatine, Illinois 60067				
Lutheran Senior Services					
2016055	Lutheran Senior Services	NONE	PC	A six-month grant to increase public awareness about seniors' unmet needs	\$32,600
	1150 Hanley Industrial Court				
	St. Louis, Missouri 63144				
Lutheran Social Services of Northeast Florida, Inc.					
2015241	Lutheran Social Services of Northeast Florida, Inc.	NONE	PC	A one-year grant to deliver food to older adults living in low-income senior housing	\$15,000
	4615 Phillips Highway				
	Jacksonville Florida 32207				
Lyric Opera of Chicago					
2016027	Lyric Opera of Chicago	NONE	PC	A one-year grant to support the Senior Matinee, a free performance for Chicago seniors of Donizetti's Lucia di Lammermoor	\$7,500
	20 North Wacker Drive,				
	Suite 860				
	Chicago, Illinois 60606				
Maplewood Housing for the Visually Impaired dba Friedman Place					
2016019	Maplewood Housing for the Visually Impaired dba Friedman Place	NONE	PC	A one-year grant to improve services to older adults who are blind or visually impaired	\$30,572
	5527 North Maplewood				
	Avenue				
	Chicago, Illinois 60625				
2016235	Maplewood Housing for the Visually Impaired dba Friedman Place	NONE	PC	A one-month matching grant in conjunction with IL Give 2016	\$5,000
	5527 North Maplewood				
	Avenue				
	Chicago, Illinois 60625				
Meals At Home					
2016124	Meals At Home	NONE	PC	A one-year grant to strengthen the organization's capacity for effective fund development	\$28,820
	1123 Emerson Street				
	Suite 213				
	Evanston, Illinois 60201-3100				

Retirement Research Foundation
Chicago, IL.
Form 990PF For The Year Ended 12-31-16 Page 11 Part XV Line 3a
36-2429540

ATTACHMENT A

2016247	Meals At Home	NONE	PC	A one-month matching grant in conjunction with IL Give 2016	\$5,000
	1123 Emerson Street				
	Suite 213				
	Evanston, Illinois 60201-3100				
	Meals on Wheels America				
2015041	Meals on Wheels America	NONE	PC	A one-year grant to study policy barriers to effective implementation of Older Americans Act nutrition programs	
	1550 Crystal Drive, Suite 1004				
	Arlington, Virginia 22202				
2015041	Meals on Wheels America	NONE	PC	A one-year grant to study policy barriers to effective implementation of Older Americans Act nutrition programs	\$40,000
	1550 Crystal Drive, Suite 1004				
	Arlington, Virginia 22202				
	Miami University Scripps Gerontology Center				
2016101	Miami University Scripps Gerontology Center	NONE	PC	A one-year grant to develop a family caregiving communication guide for families with chronically ill older adults	\$34,000
	500 E High Street				
	Oxford, Ohio 45056				
	Nassau County Council on Aging, Inc.				
2015123	Nassau County Council on Aging, Inc	NONE	PC	A one-year grant for a Geriatric Care Management Program, to ensure that older adults have access to immediate assistance in response to emergency requests for programs and services	\$25,407
	1367 South 18th Street				
	Fernandina Beach, Florida				
	32034-4756				
	National Academy of Medicine				
2013247	National Academy of Medicine	NONE	PC	A twenty-two month grant to complete an in-depth, expert review of knowledge and practice related to family caregiving in the U.S. to develop recommendations for improved policies and practices to assist caregivers, and disseminate results broadly to policymakers, advocates, and the media	\$25,000
	Keck Center				
	500 5th Street, NW				
	Washington, DC 20001-2721				
	National Academy of Social Insurance				
2015086	National Academy of Social Insurance	NONE	PC	A third-year grant of support to help lower-income older Americans understand how delaying Social Security claims beyond the age of 62 will increase their monthly retirement benefits significantly	\$37,500
	1200 New Hampshire				
	Avenue, NW Suite 830				
	Washington, DC 20036				

Retirement Research Foundation
Chicago, IL.
Form 990PF For The Year Ended 12-31-16 Page 11 Part XV Line 3a
36-2429540

ATTACHMENT A

National Association of Nutrition and Aging Services Programs					
2016081	1612 K St NW, Suite 400 Washington, District of Columbia 20006	NONE	PC	A one-year grant to study the value of socialization for the health and well- being of older adults who participate in Older Americans Act Congregate Nutrition programs	\$20,000
National Center for Healthy Housing, Inc.					
2016064	National Center for Healthy Housing, Inc 10320 Little Patuxent Parkway, Ste 500 Columbia, Maryland 21044	NONE	PC	A one-year grant to plan for the establishment of a technical assistance resource center promoting adoption of affordable, senior housing with coordinated health and social services	\$50,000
National Committee for Responsive Philanthropy					
2016082	National Committee for Responsive Philanthropy 1331 H Street, N W , Suite 200 Washington, DC 20005	NONE	PC	A one-year grant for 2016 membership support	\$15,000
National Committee to Preserve Social Security and Medicare Foundation					
2015006	National Committee to Preserve Social Security and Medicare Foundation 10 G Street, NE, Suite 600 Washington, D C 20002-4215	NONE	PC	A two-year grant for research documenting the effects of proposed changes in Social Security and Medicare on vulnerable populations	\$40,461
2015006	National Committee to Preserve Social Security and Medicare Foundation 10 G Street NE Suite 600 Washington, D C 20002-4215	NONE	PC	A two-year grant for research documenting the effects of proposed changes in Social Security and Medicare on vulnerable populations	\$75,000
National Consumer Voice for Quality Long-Term Care					
2015071	National Consumer Voice for Quality Long-Term Care 1001 Connecticut Avenue, NW Suite 632 Washington, DC 20036-5529	NONE	PC	A one-year grant to determine and report the critical factors needed for a well-planned transition when a nursing facility closes	\$44,000
National Council on Aging, Inc.					
2014185	National Council on Aging, Inc 251 18th Street South, Suite 500 Arlington, Virginia 22202	NONE	PC	A two-year grant to create and then provide technical assistance around the Elder Economic Insecurity Rate, a tool to help communities define and measure needs of older residents and	\$48,500

Retirement Research Foundation
Chicago, IL
Form 990PF For The Year Ended 12-31-16 Page 11 Part XV Line 3a
36-2429540

ATTACHMENT A

				inform policy decisions	
2015287	National Council on Aging, Inc. 251 18th Street South, Suite 500 Arlington, Virginia 22202	NONE	PC	A two-year grant to partner with GreenPath to establish a national debt and money management tele-counseling service, using an "economic casework" approach and online Economic CheckUp tools	\$88,095
2015287	National Council on Aging, Inc. 251 18th Street South, Suite 500 Arlington, Virginia 22202	NONE	PC	A two-year grant to partner with GreenPath to establish a national debt and money management tele-counseling service, using an "economic casework" approach and online Economic CheckUp tools	\$88,000
National League for Nursing					
2015069	National League for Nursing 2600 Virginia Avenue The Watergate #800 Washington, DC 20037-1905	NONE	PC	A two-year grant to train practical nursing faculty to integrate geriatric care and supervision skills in their curricula	\$40,000
2015069	National League for Nursing 2600 Virginia Avenue The Watergate #800 Washington, DC 20037-1905	NONE	PC	A two-year grant to train practical nursing faculty to integrate geriatric care and supervision skills in their curricula	\$40,000
National Quality Forum					
2015202	National Quality Forum 1030 15th Street, NW Suite 800 Washington, DC 20005	NONE	PC	A 15-month grant to enhance care quality for those with advanced illness by promoting consensus-driven clinical best practices, health systems changes, and health policy improvements	\$74,637
2015202	National Quality Forum 1030 15th Street, NW Suite 800 Washington, DC 20005	NONE	PC	A 15-month grant to enhance care quality for those with advanced illness by promoting consensus-driven clinical best practices, health systems changes, and health policy improvements	\$70,000
North Shore Senior Center					
2016022	North Shore Senior Center 161 Northfield Road Northfield, Illinois 60093	NONE	PC	A one-year grant to hire a nurse care manager to address complex health-related needs of older adults served by the CareOptions Program	\$25,000

Retirement Research Foundation
Chicago, IL.
Form 990PF For The Year Ended 12-31-16 Page 11 Part XV Line 3a
36-2429540

ATTACHMENT A

2016237	North Shore Senior Center 161 Northfield Road Northfield, Illinois 60093	NONE	PC	A one-month matching grant in conjunction with IL Give 2016	\$5,000
Northwest Side Housing Center					
2015002	Northwest Side Housing Center 5233 West Diversey Avenue Chicago, Illinois 60639	NONE	PC	A one-year grant to support the Age Friendly Banking Project using advocacy to improve access to conventional banking services and products to meet the specific needs of older adults	\$20,000
2016002	Northwest Side Housing Center 5233 West Diversey Avenue Chicago, Illinois 60639	NONE	PC	A second-year grant to support the Age Friendly Banking Project using advocacy to improve access to banking services and products that meet the specific needs of older adults	\$40,000
2016230	Northwest Side Housing Center 5233 West Diversey Avenue Chicago, Illinois 60639	NONE	PC	A one-month matching grant in conjunction with IL Give 2016	\$5,000
Northwestern University					
2016042	Northwestern University Office for Sponsored Research (OSR) 750 N Lake Shore Drive, Rutloff 7th Floor Chicago, Illinois 60611	NONE	PC	A two-year grant to study the feasibility of a resistance exercise program targeting frail, home-bound elders	\$60,648
Norton Healthcare					
2016128	Norton Healthcare 4967 U.S. Highway 42, Suite 100 Louisville Kentucky 40202	NONE	PC	A one-year grant to strengthen a program that provides effective care transitions for older adults moving from one health care setting to another	\$40,000
Oral Health America					
2015189	Oral Health America 180 North Michigan Avenue, Suite 1150 Chicago, Illinois 60601	NONE	PC	A second-year grant to improve and expand a community-based oral health education program for older adults	\$30,000

Retirement Research Foundation
Chicago, IL.
Form 990PF For The Year Ended 12-31-16 Page 11 Part XV Line 3a
36-2429540

ATTACHMENT A

2015189	Oral Health America	NONE	PC	A second-year grant to improve and expand a community-based oral health education program for older adults	\$36,508
	180 North Michigan Avenue, Suite 1150 Chicago, Illinois 60601				
	Paraprofessional Healthcare Institute, Inc.				
2015065	Paraprofessional Healthcare Institute, Inc.	NONE	PC	A two-year grant to improve entry-level training for Illinois homecare workers and advocate for policy changes to foster better jobs and quality of care	\$50,000
	400 East Fordham Road, 11th Floor Bronx, New York 10026				
	Pension Rights Center				
2016129	Pension Rights Center	NONE	PC	A one-year grant to protect retirees from potential pension benefit reductions and find solutions to save financially distressed multi-employer pension plans	\$30,000
	1350 Connecticut Ave, NW Washington, District of Columbia 20036				
	Prairie State Legal Services, Inc.				
2015088	Prairie State Legal Services, Inc.	NONE	PC	A second-year grant of support to strengthen legal services for seniors, particularly focused on long-term care and financial exploitation	\$24,365
	303 North Main Street, Suite 600 Rockford, Illinois 61101				
2016095	Prairie State Legal Services, Inc.	NONE	PC	A one-year grant to continue strengthening legal services that will protect older adults against threats to long-term care	\$27,000
	303 North Main Street, Suite 600 Rockford, Illinois 61101				
2016234	Prairie State Legal Services, Inc.	NONE	PC	A one-month matching grant in conjunction with IL Give 2016	\$5,000
	303 North Main Street, Suite 600 Rockford, Illinois 61101				
	Presence Hospitals PRV				
2015092	Presence Hospitals PRV	NONE	PC	A one-year grant to conduct a pilot project focused on managing geriatric patients' depression in the post-acute environment	\$29,895
	333 N. Madison Street Joliet, Illinois 60435				
	Rebuilding Together Greater Milwaukee				
2015177	Rebuilding Together Greater Milwaukee	NONE	PC	A one-year grant to deliver housing and supportive services to low-income older adults who wish to live independently in safety and health	\$20,000
	700 W. Virginia Street, Suite 306 Milwaukee, Wisconsin 53204				

**Retirement Research Foundation
Chicago, IL.
Form 990PF For The Year Ended 12-31-16 Page 11 Part XV Line 3a
38-2429540**

ATTACHMENT A

Rose Community Foundation					
2016227	Rose Community Foundation 600 South Cherry Street, Suite 1200 Denver, Colorado 80246	NONE	PC	To explore interest in a Funders Collaborative to promote age-friendly communities and inter-generational programs	\$3,000
Rush University Medical Center					
2015246	Rush University Medical Center Office of Philanthropy 1700 W Van Buren, Suite 250 Chicago, Illinois 60612	NONE	PC	A one-year grant for expanding a health intervention program in partnership with local faith organizations to reduce health disparities related to Type 2 diabetes and obesity among low-income, older African American women	\$25,000
2015246	Rush University Medical Center Office of Philanthropy 1700 W Van Buren, Suite 250 Chicago, Illinois 60612	NONE	PC	A one-year grant for expanding a health intervention program in partnership with local faith organizations to reduce health disparities related to Type 2 diabetes and obesity among low-income, older African American women	\$25,000
Saint John's Community Care					
2016233	Saint John's Community Care 222 Goethe Avenue Collinsville, Illinois 62234-3306	NONE	PC	A one-month matching grant in conjunction with IL Give 2016	\$5,000
Saint Mary's Antiochian Orthodox Church					
2013129	Saint Mary's Antiochian Orthodox Church 6330 West 127th Street Palos Heights, Illinois 60463	NONE	PC	An 18-month grant to install an elevator in the main church building to provide access to lower level activity locations	
Saint Monica's Senior Citizen Home, Inc.					
2015173	Saint Monica's Senior Citizen Home, Inc 3920 N Green Bay Road Racine, Wisconsin 53404	NONE	PC	A one-year grant for a training project to increase the knowledge and skills of nursing home staff and expand the capacity and number of professionals and paraprofessionals in	\$52,707
Sargent Shriver National Center on Poverty Law					
2015120	Sargent Shriver National Center on Poverty Law 50 E Washington Street, Suite 500 Chicago, Illinois 60602	NONE	PC	A third-year grant for support to continue collaborative work to educate lawmakers, workers, and the general public about Illinois' new Secure Choice universal retirement savings program	\$25,000
Services for Adults Staying in Their Homes (SASI)					

Retirement Research Foundation
Chicago, IL.
Form 990PF For The Year Ended 12-31-16 Page 11 Part XV Line 3a
36-2429540

ATTACHMENT A

2016239	Services for Adults Staying In Their Homes (SASI)	NONE	PC	A one-month matching grant in conjunction with IL Give 2016	\$5,000
	1123 Emerson Street, Suite 200				
	Evanston, Illinois 60201				
Sisters of Notre Dame de Namur					
2016079	Sisters of Notre Dame de Namur	NONE	PC	A three-month grant to purchase and install equipment	\$20,000
	701 East Columbia Avenue				
	Cincinnati, Ohio 45215-3999				
Sisters of Saint Francis of Sylvania, Ohio					
2016152	Sisters of Saint Francis, of Sylvania, Ohio	NONE	PC	A one-year grant to complete accessibility upgrades in its nursing home facility	\$25,000
	6832 Convent Blvd				
	Sylvania, Ohio 43560				
Small Business Majority Foundation, Inc.					
2016099	Small Business Majority Foundation, Inc	NONE	PC	A nine-month grant to continue educating small business owners about the Illinois Secure Choice Savings Program and work with policymakers and regulators to ensure that it is best suited to small businesses	\$25,000
	4000 Bridgeway, Suite 305				
	Sausalito, California 94965				
Social Security Works Education Fund					
2015063	Social Security Works Education Fund	NONE	PC	A second-year grant to train engaged seniors to tell their retirement income stories more effectively as they participate in advocacy regarding the retirement security crisis	\$40,000
	815 16th Street NW - 4th floor				
	Washington, District of Columbia 20006				
Texas Woman's University					
2014090	Texas Woman's University	NONE	PC	A one-year grant to examine and implement a cultural heritage program in nursing homes	
	P O Box 425619				
	Denton, Texas 76204				
The Arc of the United States					
2015200	The Arc of the United States	NONE	PC	A one-year grant to assist elderly caregivers of adult children with intellectual and developmental disabilities	\$45,000
	1825 K Street NW, Suite 1200				
	Washington, DC 20006				
2015200	The Arc of the United States			A one-year grant to assist elderly caregivers of adult children with intellectual and developmental disabilities	\$40,000
	1825 K Street NW, Suite 1200				
	Washington DC 20006				

Retirement Research Foundation
Chicago, IL.
Form 990PF For The Year Ended 12-31-16 Page 11 Part XV Line 3a
36-2429540

ATTACHMENT A

The Chicago Lighthouse for People Who Are Blind or Visually Impaired					
2015109	The Chicago Lighthouse for People Who Are Blind or Visually Impaired	NONE	PC	A one-year grant to adapt and implement Fit and Strong!, an evidence-based physical activity intervention for older adults, for use with those who are blind or visually-impaired	\$30,080
	1850 West Roosevelt Road				
	Chicago, Illinois 60608				
The Equal Rights Center					
2014137	The Equal Rights Center	NONE	PC	One-year grant to promote equal housing opportunity for lesbian, gay, bisexual, and transgender older adults through outreach, training, and advocacy	
	11 Dupont Circle NW, Suite 450				
	Washington, District of Columbia 20036				
The Foundation Center					
2016070	The Foundation Center	NONE	PC	A one-year grant for 2016 program support	\$12,000
	32 Old Slip, 24th Floor				
	New York, New York 10005-3500				
The Little Home Church by the Wayside					
2014168	The Little Home Church by the Wayside	NONE	PC	Eighteen-month grant to replace entrance doors and install automatic door openers	
	32W128 Army Trail Road				
	Wayne, Illinois 60184				
The Paramedic Foundation					
2015051	The Paramedic Foundation	NONE	PC	A one-year grant to create continuing education training for Community Paramedics on the care of chronically-ill older adults	\$20,000
	2800 North 7th Street				
	St. Cloud, Minnesota 56303				
2015051	The Paramedic Foundation	NONE	PC	A one-year grant to create continuing education training for Community Paramedics on the care of chronically-ill older adults	\$20,000
	2800 North 7th Street				
	St. Cloud, Minnesota 56303				
The University of Akron					
2014190	The University of Akron	NONE	PC	A two-year grant for research to determine if older adults can be trained to detect lies as a way of protecting them against scams	\$32,135
	Akron, Ohio 44325-4702				
United Way of Dane County					
2016039	United Way of Dane County	NONE	PC	A one-year grant to expand a program focused on preventing adverse drug events among older adults taking multiple medications	\$25,000
	Strategic Collaborations				
	2059 Atwood Ave				
	Madison, Wisconsin 53704				

Retirement Research Foundation
Chicago, IL.
Form 990PF For The Year Ended 12-31-16 Page 11 Part XV Line 3a
38-2429540

ATTACHMENT A

University of California at San Diego					
2015118	University of California at San Diego	NONE	PC	A two-year grant for research on the effect of morning bright white light therapy to reduce depressive symptoms and improve quality of life and functioning in patients with early, asymptomatic heart failure	\$60,000
	Office of Contract and Grant Administration				
	9500 Gilman Drive, MC0934				
	La Jolla, California 92093-0934				
University of California, San Francisco					
2013239	University of California, San Francisco	NONE	PC	One-year grant to help develop a national quality- improvement registry to improve the cost- effectiveness of primary care practice for home- bound patients	
	Office of Sponsored Research Contracts and Grants				
	3333 California Street				
	Suite 315				
	San Francisco California 94118				
University of Chicago					
2014195	University of Chicago	NONE	PC	A one-year grant to build an economically sustainable home-based primary care program on Chicago's South Side	
	5801 South Ellis Avenue				
	Chicago Illinois 60637				
University of Illinois at Urbana-Champaign					
2016123	University of Illinois at Urbana-Champaign	NONE	PC	A two-year grant to pilot test the efficacy of a legal services clinic for seniors focused on protecting them from financial abuse	\$42,435
	Office of Sponsored Programs				
	1901 S First Street, Suite A				
	Champaign Illinois 61820				
University of Kentucky Research Foundation					
2014211	University of Kentucky Research Foundation	NONE	PC	A two-year grant to implement and evaluate an intergenerational gardening program to improve the health and well-being of rural older adults	\$73,047
	500 South Limestone				
	109 Kinkead Hall				
	Lexington, Kentucky 40506-0057				
University of Massachusetts Boston					
2015082	University of Massachusetts Boston	NONE	PC	A one-year grant to continue providing pension counseling to Illinois retirees, assisting them to retrieve earned pension benefits, and addressing other pension problems	\$59,131
	Office of Research and Sponsored Programs				
	100 Morrissey Blvd				
	Boston, Massachusetts 02125				
2016077	University of Massachusetts Boston	NONE	PC	A one-year grant to complete the data update of the Elder Economic Security Standard	\$35,000
	Office of Research and Sponsored Programs				
	100 Morrissey Blvd				
	Boston, Massachusetts 02125				

Retirement Research Foundation
Chicago, IL.
Form 990PF For The Year Ended 12-31-16 Page 11 Part XV Line 3a
36-2429540

ATTACHMENT A

2016083	University of Massachusetts Boston	NONE	PC	A one-year grant to continue providing pension counseling to Illinois retirees, assisting them to retrieve earned pension benefits, and addressing other pension problems	\$62,161
	Office of Research and Sponsored Programs				
	100 Morrissey Blvd				
	Boston, Massachusetts 02125				
	University of North Carolina at Chapel Hill				
2015080	University of North Carolina at Chapel Hill	NONE	PC	A three-year grant to update the Bathing Without a Battle protocol to continue improving knowledge of nursing home and assisted living staff about bathing persons with dementia, including those who speak Spanish	\$41,643
	Office of Sponsored Research (OSR)				
	104 Airport Drive, Suite 2200, CB #1350				
	Chapel Hill, North Carolina 27599-1350				
2015080	University of North Carolina at Chapel Hill	NONE	PC	A three-year grant to update the Bathing Without a Battle protocol to continue improving knowledge of nursing home and assisted living staff about bathing persons with dementia, including those who speak Spanish	\$61,762
	Office of Sponsored Research (OSR)				
	104 Airport Drive, Suite 2200, CB #1350				
	Chapel Hill, North Carolina 27599-1350				
	University of Washington				
2015124	University of Washington	NONE	PC	A one-year grant for policy analysis of how remote patient monitoring technologies are used and supported through Medicaid Home and Community-Based long-term care programs	
	Office of Sponsored Programs				
	4333 Brooklyn Avenue NE				
	Box 359472				
	Seattle, Washington 98195-9472				
2015124	University of Washington	NONE	PC	A one-year grant for policy analysis of how remote patient monitoring technologies are used and supported through Medicaid Home and Community-Based long-term care programs	\$11,956
	Office of Sponsored Programs				
	4333 Brooklyn Avenue NE				
	Box 359472				
	Seattle Washington 98195-9472				
	Voyce				
2016050	Voyce	NONE	PC	A one-year grant to expand a program advocating for the rights of individuals living in long-term care communities	\$25,000
	680 Craig Rd				
	Suite 245				
	Saint Louis, MO 63141				
	Washington University in St. Louis				
2013237	Washington University in St. Louis	NONE	PC	A two-year grant to develop and test messages for recruiting Boomers as volunteers for senior nutrition programs in rural and low-income, inner city neighborhoods	
	Office of Sponsored Research Services				
	One Brookings Drive				
	St. Louis, Missouri 63130-4899				
2015220	Washington University in St. Louis	NONE	PC	A two-year grant to adapt the fall prevention program "Stepping On" for older adults with cancer	\$50,000
	Office of Sponsored Research Services				
	One Brookings Drive				
	St. Louis, Missouri 63130-4899				

Retirement Research Foundation
Chicago, IL.
Form 990PF For The Year Ended 12-31-16 Page 11 Part XV Line 3a
36-2429540

ATTACHMENT A

2013220	Washington University in St. Louis Office of Sponsored Research Services One Brookings Drive St. Louis, Missouri 63130-4899	NONE	PC	A two-year grant to adapt the fall prevention program "Stepping On" for older adults with cancer	\$61,408
	West Virginia Community Voices - WV Partnership for Elder Living				
2013213	West Virginia Community Voices - WV Partnership for Elder Living 424 Washington Street West Charleston, West Virginia 25302	NONE	PC	One-year grant to train direct care workers	
	Western Kentucky University Research Foundation, Inc.				
2015239	Western Kentucky University Research Foundation, Inc 1906 College Heights Blvd., #11016 Bowling Green, Kentucky 42101-1026	NONE	PC	A two-year grant for a randomized clinical trial to test if "Bingocize 2.0" improves fitness and executive function for community-dwelling older adults	\$31,500
2015239	Western Kentucky University Research Foundation, Inc 1906 College Heights Blvd., #11016 Bowling Green, Kentucky 42101-1026	NONE	PC	A two-year grant for a randomized clinical trial to test if "Bingocize 2.0" improves fitness and executive function for community-dwelling older adults	\$31,500
	White Crane Wellness Center				
2015191	White Crane Wellness Center 1657 W. Foster Avenue Chicago, Illinois 60640	NONE	PC	A one-year grant to launch a Fall Prevention Initiative	\$30,000
2015191	White Crane Wellness Center 1657 W. Foster Avenue Chicago, Illinois 60640	NONE	PC	A one-year grant to launch a Fall Prevention Initiative	\$25,000
2016026	White Crane Wellness Center 1657 W. Foster Avenue Chicago, Illinois 60640	NONE	PC	A one-year grant to launch a collaborative effort to expand availability of evidence-based healthy aging programs in Illinois	\$30,000
	Wisconsin Institute for Healthy Aging				
2015016	Wisconsin Institute for Healthy Aging 1414 MacArthur Road, Suite B Madison, Wisconsin 53714	NONE	PC	A second-year grant for a project designing effective referral systems to engage low-income older adults in evidence-based programs	\$30,000

ATTACHMENT A

Page 27 of 27

**The Retirement Research Foundation
Chicago, IL.
Form 990PF For The Year Ended 12-31-16 Page 11 Part XV Line 3a
36-2429540**

Attachment B

		Matching Gifts		
01/11/2016	St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	PC	1,998 00
01/11/2016	Loras College	1450 Alta Vista Street Dubuque, Iowa 52001	PC	3,000 00
01/11/2016	Center for Medicare Advocacy, Inc	1025 Connecticut Ave, NW, Ste 709 Washington, DC 20036	PC	750 00
01/18/2016	George Mason University Foundation	4400 University MSN 1A3 Fairfax, Virginia 22030	PC	3,750 00
01/18/2016	Rotary/One Foundation	65 West Jackson Chicago, Illinois 60604	PC	750 00
01/18/2016	St Pnsilla Catholic Women's Club	6949 W Addison Chicago, Illinois 60634	PC	150 00
01/18/2016	American Occupational Therapy Found	4720 Montgomery Lane, #202 P O Box 31220 Bethesda, MD 20814-1220	PC	3,000 00
01/18/2016	English Springer Rescue America, Inc	1025 Rose Creek Drive Suite 620-305 Woodstock, Georgia 30189	PC	150 00
01/18/2016	St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	PC	2,010 00
01/18/2016	Immaculate Conception Parish	1431 N North Park Ave Chicago, IL 60610	PC	450 00
01/25/2016	Holy Spirit Catholic Church	1000 Lantana Road Lantana, FL 33462	PC	12,000 00
02/01/2016	University of Chicago	5235 S Harper Ct Suite 431 Chicago, IL 60615	PC	450 00
02/01/2016	University of Chicago	5235 S Harper Ct Suite 431 Chicago, IL 60615	PC	750 00
02/01/2016	University of Rochester	P O Box 270032 Rochester, New York 14627-0032	PC	150 00
02/01/2016	American Red Cross	P O Box 37295 Washington, D C 20036	PC	300 00
02/12/2016	Arab American Family Services	9044 S Octavia Bndgeview, Illinois 60455	PC	150 00
02/12/2016	Alzheimer's Association	225 N Michigan, 17th Floor Chicago, Illinois 60601-7633	PC	225 00
02/12/2016	Advocate Chantable Foundation	205 West Touhy Ave Suite 225 Park Ridge, IL 60068	PC	1,500 00
02/12/2016	St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	PC	2,010 00
02/19/2016	Saint Gabriel Church - ABC Drive	731 N Ocean Blvd Pompano Beach, Florida 33062	PC	600 00
02/19/2016	Sarah's Circle	4838 N Sheridan Chicago, IL 60640	PC	300 00
02/19/2016	Saint Paul's Lutheran Church of Evanston	1004 Greenwood Street Evanston, IL 60201	PC	150 00
03/04/2016	St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	PC	1,992 00
03/04/2016	Jubilee Faith Community Church	17450 S Pulaski Country Club Hills, IL 60478	PC	25,890 00
03/04/2016	Interfaith Action of Evanston	P O Box 1414 Evanston, Illinois 60204	PC	300 00
03/04/2016	Umoja Student Development Corporation	954 W Washington, #225 Chicago, Illinois 60607	PC	600 00
03/04/2016	Michael J Starshak	3834 Partridge Place South Boynton Beach, FL 33436	PC	136 00
03/10/2016	The Possibility Project	104 W 27th Street, 12th Floor New York, New York 10001	PC	4,500 00
03/10/2016	Freedom Service Dogs of America	2000 W Union Avenue Englewood, Colorado 80110	PC	750 00
03/10/2016	Council on Aging of Martin County Inc	900 E Salerno Road Stuart, FL 34997	PC	600 00
03/10/2016	Council on Aging of Martin County Inc	900 E Salerno Road Stuart, FL 34997	PC	3,000 00

**The Retirement Research Foundation
Chicago, IL.
Form 990PF For The Year Ended 12-31-16 Page 11 Part XV Line 3a
36-2429540**

Attachment B

03/17/2016	Annual Catholic Appeal	835 North Rush Street Chicago, Illinois 60611	PC	4,500 00
03/17/2016	St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	PC	2,001 00
03/17/2016	Downey R Varey	417 Parkview Court Arlington Heights, Illinois 60005	PC	136 00
03/24/2016	Holy Spirit Catholic Church	1000 Lantana Road Lantana, FL 33462	PC	375 00
03/24/2016	Free Spirit Media	906 S Homan Ave 5th Floor Chicago, IL 60624	PC	150 00
03/24/2016	SewHope	3828 Brookside Road Ottawa Hills, Ohio 43606	PC	3,750 00
03/24/2016	Mills College	Office of Institutional Advacemnt 5000 MacArthur Blvd Oakland, California 94613	PC	150 00
03/29/2016	Wildflowers Institute	1144 Pacific Avenue San Francisco, CA 94133-4212	PC	3,000 00
04/06/2016	Health Foundation of South Florida	2 Biscayne Blvd # 1710 Miami, FL 33131	PC	750 00
04/06/2016	Open Books LTD	651 West Lake Street Chicago, IL 60661	PC	300 00
04/06/2016	Services & Advocacy for GLBT Elders, Inc	305 Seventh Avenue, 15th Floor New York, NY 10033	PC	175 00
04/13/2016	Housing Opportunities & Maintenance	for the Elderly 1419 W Carroll Avenue, FL 2 Chicago, IL 60607-1149	PC	750 00
04/13/2016	St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	PC	4,002 00
04/13/2016	Avon Breast Cancer Crusade LLC	P O Box 66120 Washington, DC 20035	PC	195 00
04/13/2016	Avon Breast Cancer Crusade LLC	P O Box 66120 Washington, DC 20035	PC	195 00
04/21/2016	Angles for Sexual Health, Identity & Ed	1779 Maple Street Northfield, Illinois 60093	PC	375 00
04/21/2016	St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	PC	2,004 00
04/28/2016	George Mason University Foundation	4400 University MSN 1A3 Fairfax, Virginia 22030	PC	3,750 00
04/28/2016	National Ovarian Cancer Coalition	4900 Hopyard Rd #100 Pleasanton, CA 94588	PC	300 00
05/04/2016	Avon Breast Cancer Crusade LLC	P O Box 66120 Washington, DC 20035	PC	150 00
05/04/2016	Office of Immigrant Affairs	Archdiocese of Chicago 3525 S Lake Park Ave Chicago, IL 60653	PC	1,500 00
05/04/2016	Benedictine Sisters of Chicago	St Scholastica Monastery 7430 N Ridge Blvd Chicago, IL 60645-1913	PC	450 00
05/16/2016	St Teresa of Avila Parish	1950 N Kenmore Chicago, Illinois 60614	PC	15,000 00
05/16/2016	St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	PC	1,998 00
05/25/2016	MR I Children's Chanty	1040 Rosemary Terrace Deerfield, IL 60015	PC	150 00
05/25/2016	St Philip The Apostle Church	1962 Old Willow Road Northfield, Illinois 60093	PC	12,000 00
05/25/2016	Chicago Public Library Foundation	20 N Michigan Ave -Suite 520 Chicago, IL 60602	PC	1,500 00
05/25/2016	Benedictine Sisters of Chicago	St Scholastica Monastery 7430 N Ridge Blvd Chicago, IL 60645-1913	PC	3,150 00
05/25/2016	Catholic Charities-Archdiocese of Chicago	721 N LaSalle St -4th Floor Chicago, IL 60654-3503	PC	3,750 00
06/02/2016	Cubs Charities	1060 West Addison Chicago, Illinois 60613	PC	100 00
06/02/2016	St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	PC	2,004 00
06/02/2016	Avon Breast Cancer Crusade LLC	P O Box 66120 Washington, DC 20035	PC	300 00

**The Retirement Research Foundation
Chicago, IL.
Form 990PF For The Year Ended 12-31-16 Page 11 Part XV Line 3a
36-2429540**

Attachment B

06/02/2016	Avon Breast Cancer Crusade LLC	P O Box 66120 Washington, DC 20035	PC	750 00
06/02/2016	Avon Breast Cancer Crusade LLC	P O Box 66120 Washington, DC 20035	PC	300 00
06/02/2016	San Francisco Hospital Foundation	2789 25th St #2028 San Francisco, CA 94110	PC	600 00
06/09/2016	Freedom Service Dogs of America	2000 W Union Avenue Englewood, Colorado 80110	PC	150 00
06/09/2016	A Man in Recovery Foundation	142 N Huffman Naperville, Illinois 60540	PC	100 00
06/09/2016	St Michael in Old Town	1633 N Cleveland Ave Chicago, IL 60614	PC	1,500 00
06/09/2016	Access Living of Metropolitan Chicago	115 W Chicago Avenue Chicago, IL 60654	PC	1,200 00
06/16/2016	Lincoln Park Village, Inc	2502 N Clark Street Chicago, IL 60614	PC	4,500 00
06/16/2016	Art Institute of Chicago	111 S Michigan Avenue Chicago, IL 60603	PC	150 00
06/16/2016	St Gabriel Catholic Church	731 N Ocean Blvd Pompano Beach, FL 33062	PC	1,200 00
06/16/2016	St Thomas of Canterbury School	4827 N Kenmore Avenue Chicago, IL 60640	PC	3,750 00
06/22/2016	YWCA Evanston/North Shore	1215 Church Street Evanston, Illinois 60201	PC	150 00
06/22/2016	Freedom Service Dogs of America	2000 W Union Avenue Englewood, Colorado 80110	PC	150 00
06/28/2016	St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	PC	1,998 00
06/28/2016	The Chicago Innovation Foundation	2001 N Halsted Chicago, Illinois 60614	PC	375 00
06/28/2016	Lincoln Park Village, Inc	2502 N Clark Street Chicago, IL 60614	PC	375 00
06/28/2016	Hazelden Betty Ford Foundation	P O Box 11 Center City, Minnesota 55012	PC	150 00
07/07/2016	Dominican University	7900 West Division Street River Forest, Illinois 60305	PC	7,500 00
07/07/2016	Immaculate Conception Parish	1431 N North Park Ave Chicago, IL 60610	PC	900 00
07/07/2016	Lincoln Park Village, Inc	2502 N Clark Street Chicago, IL 60614	PC	7,500 00
07/15/2016	A Man in Recovery Foundation	142 N Huffman Naperville, Illinois 60540	PC	2,100 00
07/15/2016	A Man in Recovery Foundation	142 N Huffman Naperville, Illinois 60540	PC	150 00
07/15/2016	The Colorado College	14 E Cache LaPoudre St Colorado Springs, Colorado 80901	PC	6,000 00
07/22/2016	A Man in Recovery Foundation	142 N Huffman Naperville, Illinois 60540	PC	150 00
07/22/2016	Dominican University	7900 West Division Street River Forest, Illinois 60305	PC	7,500 00
07/22/2016	St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	PC	2,400 00
07/22/2016	Cubs Charities	1060 West Addison Chicago, Illinois 60613	PC	600 00
07/29/2016	Ball State University Foundation	2800 W Betnel Avenue Muncie, Indiana 47304	PC	300 00
08/05/2016	Songs by Heart Foundation	1700 Pennsylvania Ave #600 Washington, DC 20006	PC	150 00
08/05/2016	St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	PC	1,599 99
08/15/2016	Muse of Fire Theatre Company	1712 Wesley Avenue Evanston, Illinois 60204	PC	375 00
08/24/2016	St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	PC	984 00

**The Retirement Research Foundation
Chicago, IL.
Form 990PF For The Year Ended 12-31-16 Page 11 Part XV Line 3a
36-2429540**

Attachment B

08/24/2016	College of DuPage Foundation	435 Fawell Blvd Glen Ellyn, Illinois 60137	PC	600 00
08/24/2016	Avon Breast Cancer Crusade LLC	P O Box 68120 Washington, DC 20035	PC	183 00
08/31/2016	South Holland Master Chorale	16626 Wausau Avenue South Holland, Illinois 60473	PC	375 00
08/31/2016	Catholic Charities-Archdiocese of Chicago	721 N LaSalle St -4th Floor Chicago, IL 60654-3503	PC	3,450 00
08/31/2016	Housing Opportunities & Maintenance	for the Elderly 1419 W Carroll Avenue, FL 2 Chicago, IL 60607-1149	PC	1,500 00
09/09/2016	North Point Lighthouse Friends, Inc	2650 N Wahl Ave Milwaukee, WI 53211	PC	150 00
09/09/2016	DonorsChoose Org	134 W 37th Street, 11th Floor New York, NY 10018	PC	300 00
09/16/2016	Notre Dame College Prep	7655 W Dempster Street Niles, IL 60714	PC	1,500 00
09/30/2016	Alzheimer's Assn - Greater IL Chapter	8430 W Bryn Mawr, #800 Chicago, Illinois 60631	PC	150 00
09/30/2016	Lincoln Park Village, Inc	2502 N Clark Street Chicago, IL 60614	PC	6,000 00
09/30/2016	Final Options Illinois	1055 W Bryn Mawr #F212 Chicago, Illinois 60660	PC	150 00
09/30/2016	Hospice of the Calumet Area - Transitions	600 Superior Avenue Munster, Indiana 46321	PC	300 00
09/30/2016	University of WI - Eau Claire Foundation	214 Schofield Hall - 105 Garfield P O Box 4004 Eau Claire, Wisconsin 54702	PC	225 00
10/06/2016	American Red Cross	P O Box 37295 Washington, D C 20036	PC	300 00
10/06/2016	Hospice of the Calumet Area - Transitions	600 Superior Avenue Munster, Indiana 46321	PC	150 00
10/06/2016	Hospice of the Calumet Area - Transitions	600 Superior Avenue Munster, Indiana 46321	PC	100 00
10/06/2016	Jubilee Faith Community Church	17450 S Pulaski Country Club Hills, IL 60478	PC	0 00
10/06/2016	Jubilee Faith Community Church	17450 S Pulaski Country Club Hills, IL 60478	PC	12,900 00
10/13/2016	Lincoln Park Village, Inc	2502 N Clark Street Chicago, IL 60614	PC	3,750 00
10/13/2016	PS It's Social	2922 Central Street Evanston, Illinois 60302	PC	750 00
10/13/2016	Yale University	c/o Amy Justice, M D , Ph D VA Connecticut Healthcare 950 Campbell	PC	175 00
10/19/2016	AgeOptions Inc	1048 W Lake Street, Suite 300 Oak Park, IL 60301-1102	PC	375 00
10/28/2016	AgeOptions Inc	1048 W Lake Street, Suite 300 Oak Park, IL 60301-1102	PC	0 00
11/11/2016	Little Brothers-Friends of the Elderly	355 N Ashland Avenue Chicago, IL 60607	PC	375 00
11/11/2016	Hospice of the Calumet Area - Transitions	600 Superior Avenue Munster, Indiana 46321	PC	300 00
11/11/2016	Chicago Foundation for Women	1 E Wacker Dr , Suite 1620 Chicago, IL 60601	PC	468 75
11/28/2016	Operation Support Our Troops - America	1807 S Washington, #110-359 Naperville, IL 60565	PC	150 00
11/28/2016	Wayland Academy	101 N University Avenue Beaver Dam, WI 53916	PC	1,200 00
11/28/2016	Chicago City Day School	588 W Hawthorne Place Chicago, Illinois 60657	PC	4,500 00
12/02/2016	Housing Opportunities & Maintenance	for the Elderly 1419 W Carroll Avenue, FL 2 Chicago, IL 60607-1149	PC	0 00
12/02/2016	Center for Medicare Advocacy, Inc	1025 Connecticut Ave, NW, Ste 709 Washington, DC 20036	PC	750 00
12/02/2016	Chicago Children's Museum	700 E Grand Avenue Chicago, IL 60611	PC	9,000 00

**The Retirement Research Foundation
Chicago, IL.
Form 990PF For The Year Ended 12-31-16 Page 11 Part XV Line 3a
36-2429540**

Attachment B

12/02/2016	Heartland Animal Shelter	2975 Milwaukee Avenue Northbrook, IL 60062	PC	150 00
12/02/2016	Hanul Family Alliance	5008 N Kedzie Ave Chicago, IL 60625	PC	150 00
12/02/2016	Center of Concern	1580 N Northwest Hwy, Ste 310 Park Ridge, IL 60068-1462	PC	150 00
12/02/2016	Hanul Family Alliance	5008 N Kedzie Ave Chicago, IL 60625	PC	150 00
12/02/2016	University of Wisc Milwaukee Foundation	1440 E North Ave Milwaukee, WI 53202	PC	3,750 00
12/13/2016	The Wetlands Initiative	53 West Jackson, #1015 Chicago, Illinois 60604	PC	750 00
12/13/2016	Elderday Center, Inc	328 W Wilson Street Batavia, IL 60510	PC	150 00
12/13/2016	Dominican University	7900 West Division Street River Forest, Illinois 60305	PC	3,000 00
12/13/2016	Benedictine Sisters of Chicago	St Scholastica Monastery 7430 N Ridge Blvd Chicago, IL 60645-1913	PC	300 00
12/13/2016	Housing Opportunities & Maintenance	for the Elderly 1419 W Carroll Avenue, FL 2 Chicago, IL 60607-1149	PC	1,350 00
12/13/2016	American Occupational Therapy Found	4720 Montgomery Lane, #202 P O Box 31220 Bethesda, MD 20814-1220	PC	300 00
12/13/2016	American Occupational Therapy Found	4720 Montgomery Lane, #202 P O Box 31220 Bethesda, MD 20814-1220	PC	1,200 00
12/13/2016	Bonnet House, Inc	900 N Birch Rd Ft. Lauderdale, FL 33304	PC	150 00
12/15/2016	Salvation Army	1445 W Broward Blvd Fort Lauderdale, FL 33312	PC	150 00
12/15/2016	University of Chicago	5235 S Harper Ct Suite 431 Chicago, IL 60615	PC	750 00
12/16/2016	Jubilee Faith Community Church	17450 S Pulaski Country Club Hills, IL 60478	PC	12,000 00
12/16/2016	Lincoln Park Village, Inc	2502 N Clark Street Chicago, IL 60614	PC	150 00
12/16/2016	Healthy Schools Campaign	175 N Franklin, Suite 300 Chicago, Illinois 60606	PC	1,500 00
12/16/2016	Aging Care Connections	111 W Hams Ave LaGrange, IL 60525	PC	150 00
12/16/2016	Lincoln Park Zoological Society	2001 N Clark Street Chicago, IL 60614	PC	150 00
12/16/2016	Access Living of Metropolitan Chicago	115 W Chicago Avenue Chicago, IL 60654	PC	600 00
12/20/2016	Rehabilitation Institute of Chicago	345 E Superior Street Chicago, IL 60611	PC	600 00
12/20/2016	Open Books LTD	651 West Lake Street Chicago, IL 60661	PC	300 00
12/20/2016	University of Illinois Foundation	1305 West Green Street Urbana, IL 61801-2962	PC	900 00
12/20/2016	University of Chicago	5235 S Harper Ct Suite 431 Chicago, IL 60615	PC	525 00
			Total Matching Gifts	276,329 74

Retirement Research Foundation
Chicago, IL.
Form 990PF for the Year Ended 12-31-16 Page 11 Part XV Line 3b
36-2429540

ATTACHMENT C

Recipient's Name and Address	Foundation Status of Recipient	Purpose of Grant	Schedule Date	Amount
<u>Advocate Illinois Masonic Medical Center</u>				
Advocate Illinois Masonic Medical Center	PC	A one-year grant for outreach,	1/13/2017	\$30,960
836 West Wellington Avenue		education, and care coordination to		
Chicago, Illinois 60657		assist older adults with incontinence		
Advocate Illinois Masonic Medical Center	PC	A one-year grant for outreach,	7/14/2017	\$30,000
836 West Wellington Avenue		education, and care coordination to		
Chicago, Illinois 60657		assist older adults with incontinence		
<u>AgeOptions, Inc.</u>				
AgeOptions, Inc.	PC	A one-year grant to continue a	1/16/2017	\$20,000
1048 Lake Street, Suite 300		culturally competent caregiver support		
Oak Park, Illinois 60301		program through a network of local		
		churches		
AgeOptions, Inc.	PC	A one-year grant to build the capacity	1/13/2017	\$39,000
1048 Lake Street, Suite 300		of Illinois service providers and		
Oak Park, Illinois 60301		advocates to ensure older adults have		
		access to the most appropriate and		
		affordable healthcare coverage		
AgeOptions, Inc.	PC	A one-year grant to build the capacity	7/14/2017	\$38,000
1048 Lake Street, Suite 300		of Illinois service providers and		
Oak Park, Illinois 60301		advocates to ensure older adults have		
		access to the most appropriate and		
		affordable healthcare coverage		
AgeOptions, Inc.	PC	A one-year grant to build the capacity	10/13/2017	\$38,000
1048 Lake Street, Suite 300		of Illinois service providers and		
Oak Park, Illinois 60301		advocates to ensure older adults have		
		access to the most appropriate and		
		affordable healthcare coverage		

Retirement Research Foundation
Chicago, IL.
Form 990PF for the Year Ended 12-31-16 Page 11 Part XV Line 3b
36-2429540

ATTACHMENT C

American College of Cardiology Foundation				
American College of Cardiology Foundation	PC	A 28-month grant to disseminate the	4/3/2017	\$15,000
Heart House		curriculum Essentials of		
2400 N Street, NW		Cardiovascular Care for Older Adults		
Washington, District of Columbia 20037		to nearly 12,000 health professionals in		
		10 states, to improve care of older		
		adults with cardiovascular disease		
American Geriatrics Society				
American Geriatrics Society	PC	A one-year grant for advocacy to	1/16/2017	\$15,049
40 Fulton Street, 18th Floor		improve physician reimbursement for		
New York, New York 10038		care management of older adults with		
		multiple chronic conditions		
American Public Health Association				
American Public Health Association	PC	A ten-year grant (\$6,000 each year) for	11/15/2017	\$6,000
800 I Street, N W		awards to six students annually for		
Washington, DC 20001-3710		research excellence in gerontological		
		health		
Benjamin Rose Institute on Aging				
Benjamin Rose Institute on Aging	PC	A two-year grant for a randomized	1/16/2017	\$88,268
11890 Fairhill Road		clinical trial testing the impact of the		
Cleveland, Ohio 44120-1053		SHARE intervention on older adults		
		with chronic conditions and their		
Benjamin Rose Institute on Aging				
Benjamin Rose Institute on Aging	PC	A two-year grant for a randomized	10/16/2017	\$88,267
11890 Fairhill Road		clinical trial testing the impact of the		
Cleveland, Ohio 44120-1053		SHARE intervention on older adults		
		with chronic conditions and their		
		informal caregivers		
Center for Community Change				
Center for Community Change	PC	A second-year grant of support to	1/13/2017	\$35,000
1536 U Street NW		continue and expand the structured		
Washington, DC 20009		Leadership Cross- Training Program		
		focusing on the issues faced by senior		
		residents who are owners of		

Retirement Research Foundation
Chicago, IL.
Form 990PF for the Year Ended 12-31-16 Page 11 Part XV Line 3b
36-2429540

ATTACHMENT C

		manufactured homes		
Center for Community Change	PC	A second-year grant of support to	7/14/2017	\$35,000
1536 U Street NW		continue and expand the structured		
Washington DC 20009		Leadership Cross- Training Program		
		focusing on the issues faced by senior		
		residents who are owners of		
		manufactured homes		
Center for Medicare Advocacy, Inc.				
Center for Medicare Advocacy, Inc.	PC	A redirection of grant funds for a six	1/13/2017	\$43,855
P O Box 350		month project to save health care		
Willimantic, Connecticut 06226				
Chinese American Service League, Inc.				
Chinese American Service League, Inc.	PC	A one-year grant to implement	1/16/2017	\$21,638
2141 S Tan Court		Enhance Fitness, an evidence- based		
Chicago, Illinois 60616		exercise program for older adults		
ElderCARE@ChristChurch				
ElderCARE@ChristChurch	PC	A second-year grant in support for	1/13/2017	\$20,000
410 Grand Avenue		outreach efforts to serve additional		
Waukegan Illinois 60085		older adults in northern Lake County,		
		Illinois		

Retirement Research Foundation
Chicago, IL.
Form 990PF for the Year Ended 12-31-16 Page 11 Part XV Line 3b
36-2429540

ATTACHMENT C

Ford Heights Community Service Organization Inc.				
Ford Heights Community Service Organization Inc.	PC	A third-year grant in support of its	1/13/2017	\$30,000
943 East Lincoln Highway		Senior Wellness & Education		
Ford Heights, Illinois 60411		Lifestyles program, which helps		
		low-income older adults have healthier		
		lifestyles by addressing food		
		insecurity, chronic heart disease,		
		diabetes, and obesity		
Generations United				
Generations United	PC	A one-year grant for a collaborative	1/13/2017	\$47,968
25 E Street, NW - 3rd floor		study on intergenerational		
Suite 900		programming provided in senior		
Washington, DC 20001		housing		
Heart2Heart Senior Outreach of South Florida				
Heart2Heart Senior Outreach of South Florida	PC	A second-year grant in support for its	1/13/2017	\$40,643
2701 West Cypress Creek Road		program involving volunteers who		
Fort Lauderdale, Florida 33309		establish ongoing friendships with		
		isolated nursing home residents		
Henry J. Kaiser Family Foundation				
Henry J. Kaiser Family Foundation	POF	An 18-month grant for policy research	1/13/2017	\$50,000
2400 Sand Hill Road		on the costs, consequences, and		
Menlo Park, California 94025		policy options to address the gap in		
		Medicare's oral health coverage.		
Henry J. Kaiser Family Foundation	POF	An 18-month grant for policy research	10/13/2017	\$107,983
2400 Sand Hill Road		on the costs, consequences, and		
Menlo Park, California 94025		policy options to address the gap in		
		Medicare's oral health coverage		
Hospice of the Florida Suncoast				
Hospice of the Florida Suncoast	PC	A second-year grant of support to	1/13/2017	\$39,293
5771 Roosevelt Blvd, #700		ensure seniors and their caregivers		
Clearwater, Florida 33760		recognize hospice as an option for		
		care at end-of-life and assist		
		physicians to make timely referrals of		

Retirement Research Foundation
Chicago, IL.
Form 990PF for the Year Ended 12-31-16 Page 11 Part XV Line 3b
36-2429540

ATTACHMENT C

		older patients to hospice care		
--	--	--------------------------------	--	--

Retirement Research Foundation
Chicago, IL.
Form 990PF for the Year Ended 12-31-16 Page 11 Part XV Line 3b
36-2429540

ATTACHMENT C

Housing Options Provided for the Elderly, Inc.				
Housing Options Provided for the Elderly, Inc.	PC	A one-year grant to counsel	1/13/2017	\$40,000
4265 Shaw		homeowners who have Home Equity		
St Louis, Missouri 63110		Conversion Mortgages that are in		
		arrears		
Howard Brown Health Center				
Howard Brown Health Center	PC	A one-year grant for a planning grant to	1/13/2017	\$33,000
4025 North Sheridan Road		develop a more proactive and strategic		
Chicago, Illinois 60613		approach to the organization's Aging		
		Services Department		
Indiana University				
Indiana University	PC	A two-year grant to compare the	7/14/2017	\$51,779
Office of Research Administration		quality of end-of-life care planning in		
980 Indiana Avenue, Lockefield 2232		Indiana nursing facilities using and not		
Indianapolis, Indiana 46202-2915		using the POLST Paradigm.		
Indiana University				
Indiana University	PC	A two-year grant to compare the	4/13/2018	\$50,000
Office of Research Administration		quality of end-of-life care planning in		
980 Indiana Avenue, Lockefield 2232		Indiana nursing facilities using and not		
Indianapolis Indiana 46202-2915		using the POLST Paradigm		
International Institute of Metro St. Louis				
International Institute of Metro St. Louis	PC	A one-year grant to launch a program	1/13/2017	\$10,385
3401 Arsenal St		to engage elderly refugees in healthy		
Saint Louis, Missouri 63118		active gardening activities		
Jewish Family & Career Services				
Jewish Family & Career Services	PC	A one-year grant for a pilot program on	1/16/2017	\$25,997
2821 Klempner Way		workforce development, to meet the		
Louisville, Kentucky 40205		needs of financially vulnerable older		
		adults		
Jewish Family & Community Services of Southwest Florida				
Jewish Family & Community Services of Southwest Florida	PC	A one-year grant to continue case	1/13/2017	\$20,000

Retirement Research Foundation
Chicago, IL.
Form 990PF for the Year Ended 12-31-16 Page 11 Part XV Line 3b
36-2429540

ATTACHMENT C

5025 Castello Dr Suite 101 Naples, Florida 34103		management services for older adults with dementia and their caregivers		
Jewish Family & Community Services of Southwest Florida	PC	A one-year grant to continue case	7/14/2017	\$20,000
5025 Castello Dr Suite 101 Naples, Florida 34103		management services for older adults with dementia and their caregivers		
Justice In Aging				
Justice In Aging	PC	A one-year grant for advocacy to end the illegal practice of billing older adults for costs of health services above what insurers will cover	1/16/2017	\$45,000
1444 Eye Street, NW, Suite 1100 Washington, DC 20005				
Kenwood Oakland Community Organization				
Kenwood Oakland Community Organization	PC	A second-year grant of support to empower low-income, African American older adults to advocate for the preservation and improvement of affordable senior housing in Bronzeville	1/13/2017	\$30,000
4242 South Cottage Grove Avenue Chicago, Illinois 60653-2908				

Retirement Research Foundation
Chicago, IL.
Form 990PF for the Year Ended 12-31-16 Page 11 Part XV Line 3b
36-2429540

ATTACHMENT C

<u>Life Matters Media, Inc.</u>				
<u>Life Matters Media, Inc.</u>	PC	A one-year grant to promote effective	1/13/2017	\$19,998
517 N Racine Avenue, Unit 2		advance care planning conversations		
Chicago, Illinois 60642		in Chatham as a model for the Chicago		
		region		
<u>Lutheran Social Services of Northeast Florida, Inc.</u>				
<u>Lutheran Social Services of Northeast Florida, Inc.</u>	PC	A second-year grant of support to	1/13/2017	\$18,000
4615 Phillips Highway		deliver food to older adults living in		
Jacksonville, Florida 32207		low-income senior housing		
<u>Memorial Foundation, Inc.</u>				
<u>Memorial Foundation, Inc.</u>	PC	A second-year grant of support to	1/13/2017	\$17,000
3329 Johnson Street		conduct dance and strength training		
Hollywood, Florida 33021		classes specifically designed to benefit		
		older adults with Parkinson's disease		
		as well as their caregivers		
<u>Memory Care Home Solutions</u>				
<u>Memory Care Home Solutions</u>	PC	A third-year grant of support to	1/13/2017	\$45,250
4389 West Pine Blvd		continue its intervention for caregivers		
Saint Louis, Missouri 63108		of loved ones with dementia, enhanced		
		with occupational therapist visits, and		
		develop the financial infrastructure to		
		sustain this service model		
<u>Miami University Scripps Gerontology Center</u>				
<u>Miami University Scripps Gerontology Center</u>	PC	A one-year grant to develop a family	4/14/2017	\$30,704
500 E High Street		caregiving communication guide for		
Oxford, Ohio 45056		families with chronically ill older adults		
<u>Milwaukee Christian Center, Inc.</u>				
<u>Milwaukee Christian Center, Inc.</u>	PC	A one-year grant to adapt a fall	1/13/2017	\$47,600
807 S 14th St		prevention program, Stepping On, for		
Milwaukee, Wisconsin 53204		use with Southeast Asian seniors		
<u>National Center for Healthy Housing, Inc.</u>				
	Page 8 of 14			

Retirement Research Foundation
Chicago, IL.
Form 990PF for the Year Ended 12-31-16 Page 11 Part XV Line 3b
36-2429540

ATTACHMENT C

National Center for Healthy Housing, Inc. 10320 Little Patuxent Parkway, Ste 500 Columbia, Maryland 21044	PC	A one-year grant to plan for the establishment of a technical assistance resource center promoting adoption of affordable, senior housing with coordinated health and social services	1/16/2017	\$50,000
National Consumer Voice for Quality Long-Term Care				
National Consumer Voice for Quality Long-Term Care 1001 Connecticut Avenue, NW Suite 632 Washington, DC 20036-5529	PC	An 18-month grant for training and advocacy to protect the rights of long-term care residents in facilities that are closing	1/13/2017	\$50,000
National Consumer Voice for Quality Long-Term Care 1001 Connecticut Avenue, NW Suite 632 Washington, DC 20036-5529	PC	An 18-month grant for training and advocacy to protect the rights of long-term care residents in facilities that are closing	7/14/2017	\$49,545
National Consumer Voice for Quality Long-Term Care 1001 Connecticut Avenue, NW Suite 632 Washington, DC 20036-5529	PC	An 18-month grant for training and advocacy to protect the rights of long-term care residents in facilities that are closing	1/15/2018	\$50,000
National Council on Aging, Inc.				
National Council on Aging, Inc. 251 18th Street South, Suite 500 Arlington, Virginia 22202	PC	A two-year grant to partner with GreenPath to establish a national debt and money management tele-counseling service, using an "economic casework" approach and online Economic CheckUp tools	4/14/2017	\$61,955
National Council on Aging, Inc. 251 18th Street South, Suite 500 Arlington, Virginia 22202	PC	A two-year grant to partner with GreenPath to establish a national debt and money management tele-counseling service, using an "economic casework" approach and online Economic CheckUp tools	10/16/2017	\$61,950
Page 9 of 10				

Retirement Research Foundation
Chicago, IL.
Form 990PF for the Year Ended 12-31-16 Page 11 Part XV Line 3b
36-2429540

ATTACHMENT C

North Shore Senior Center				
North Shore Senior Center	PC	A one-year grant to hire a nurse care manager to address complex health-related needs of older adults served by the CareOptions Program	4/14/2017	\$25,000
161 Northfield Road				
Northfield, Illinois 60093				
Northwest Side Housing Center				
Northwest Side Housing Center	PC	A second-year grant to support the Age Friendly Banking Project using advocacy to improve access to banking services and products that meet the specific needs of older adults	1/16/2017	\$20,000
5233 W Diversey Ave				
Chicago, Illinois 60639				
Northwestern University				
Northwestern University	PC	A two-year grant to study the feasibility of a resistance exercise program targeting frail, home-bound elders	7/14/2017	\$44,687
Office of Sponsored Research (OSR)				
1801 Maple Avenue				
2nd Floor, Suite 2410				
Evanston, Illinois 60201-3149				
Northwestern University				
Northwestern University	PC	A two-year grant to study the feasibility of a resistance exercise program targeting frail, home-bound elders	1/15/2018	\$44,686
Office of Sponsored Research (OSR)				
1801 Maple Avenue				
2nd Floor, Suite 2410				
Evanston, Illinois 60201-3149				
Norton Healthcare				
Norton Healthcare	PC	A one-year grant to strengthen a program that provides effective care transitions for older adults moving from one health care setting to another	4/14/2017	\$60,000
4967 U S Highway 42,				
Suite 100				
Louisville, Kentucky 40202				
Pension Rights Center				
Pension Rights Center	PC	A one-year grant to protect retirees from potential pension benefit	4/14/2017	\$30,000
1350 Connecticut Ave, NW				

Retirement Research Foundation
Chicago, IL.
Form 990PF for the Year Ended 12-31-16 Page 11 Part XV Line 3b
36-2429540

ATTACHMENT C

Washington, District of Columbia 20036		reductions and find solutions to save financially distressed multi-employer pension plans		
<u>Prairie State Legal Services, Inc.</u>				
Prairie State Legal Services, Inc. 303 North Main Street, Suite 600 Rockford, Illinois 61101	PC	A one-year grant to continue strengthening legal services that will protect older adults against threats to long-term care	4/14/2017	\$26,500
<u>Second Presbyterian Church of Chicago</u>				
Second Presbyterian Church of Chicago 1936 South Michigan Avenue Chicago, Illinois 60616	PC	An 18-month grant to make one restroom accessible	4/14/2017	\$25,000
<u>Second Sense</u>				
Second Sense 65 E Wacker Place, Suite 1010 Chicago, Illinois 60601	PC	A third-year grant of support to build the capacity of community-based, low-vision support group leaders to help their members access quality vision rehabilitation information, resources, and training	1/13/2017	\$16,115
Second Sense 65 E Wacker Place, Suite 1010 Chicago, Illinois 60601	PC	A third-year grant of support to build the capacity of community-based, low-vision support group leaders to help their members access quality vision rehabilitation information, resources, and training	7/14/2017	\$16,000
<u>The Chicago School of Professional Psychology</u>				
The Chicago School of Professional Psychology 325 N Wells, 4th Floor Chicago, Illinois 60654	PC	A one-year grant to implement a collaborative, community training program on senior hoarding	1/13/2017	\$38,824
The Chicago School of Professional Psychology 325 N Wells, 4th Floor	PC	A one-year grant to implement a collaborative, community training	7/14/2017	\$38,823

Retirement Research Foundation
Chicago, IL.
Form 990PF for the Year Ended 12-31-16 Page 11 Part XV Line 3b
36-2429540

ATTACHMENT C

Chicago, Illinois 60654		program on senior hoarding		
<u>United Way of Dane County</u>				
United Way of Dane County	PC	A one-year grant to expand a program	1/16/2017	\$25,000
Strategic Collaborations		focused on preventing adverse drug		
2059 Atwood Ave		events among older adults taking		
Madison, Wisconsin 53704		multiple medications		
<u>University of California at San Diego</u>				
University of California at San Diego	PC	A two-year grant for research on the	4/14/2017	\$37,607
Office of Contract and Grant		effect of morning bright white light		
Administration		therapy to reduce depressive		
9500 Gilman Drive, MC0934		symptoms and improve quality of life		
La Jolla, California 92093-0934		and functioning in patients with early,		
		asymptomatic heart failure		

Retirement Research Foundation
Chicago, IL.
Form 990PF for the Year Ended 12-31-16 Page 11 Part XV Line 3b
36-2429540

ATTACHMENT C

<u>University of Illinois at Urbana-Champaign</u>				
University of Illinois at Urbana-Champaign	PC	A two-year grant to pilot test the	7/14/2017	\$42,172
Office of Sponsored Programs		efficacy of a legal services clinic for		
1901 S. First Street, Suite A		seniors focused on protecting them		
Champaign, Illinois 61820		from financial abuse		
1901 S. First Street, Suite A		seniors focused on protecting them		
<u>University of Massachusetts Boston</u>				
University of Massachusetts Boston	PC	A one-year grant to continue providing	1/13/2017	\$62,161
Programs		assisting them to retrieve earned		
Boston, Massachusetts 02125		pension problems		
<u>University of North Carolina at Chapel Hill</u>				
University of North Carolina at Chapel Hill	PC	A three-year grant to update the	10/13/2017	\$35,762
Office of Sponsored Research (OSR)		Bathing Without a Battle protocol to		
#1350		nursing home and assisted living staff		
Chapel Hill, North Carolina 27599-1350		about bathing persons with dementia,		
		including those who speak Spanish		
<u>Volunteer Center of Racine County</u>				
Volunteer Center of Racine County	PC	A second-year grant of support to	1/13/2017	\$15,000
6216 Washington Avenue, Suite G		expand a transportation program for		
Racine, Wisconsin 53406		homebound seniors, using volunteer		
		drivers		
<u>Voyce</u>				
Voyce	PC	A one-year grant to expand a program	1/16/2017	\$20,000
680 Craig Road, Suite 245		advocating for the rights of individuals		
St. Louis, Missouri 63141		living in long-term care communities		
<u>Washington University in St. Louis</u>				
Washington University in St. Louis	PC	A two-year grant to adapt the fall	4/14/2017	\$72,817
Office of Sponsored Research Services		prevention program "Stepping On" for		
One Brookings Drive		older adults with cancer		
St. Louis, Missouri 63130-4899				

Retirement Research Foundation
Chicago, IL.
Form 990PF for the Year Ended 12-31-16 Page 11 Part XV Line 3b
36-2429540

ATTACHMENT C

<u>Western Kentucky University Research Foundation, Inc.</u>				
Western Kentucky University Research Foundation, Inc.	PC	A two-year grant for a randomized clinical trial to test if "Bingocize 2.0" improves fitness and executive function for community-dwelling older adults	7/14/2017	\$31,682
1906 College Heights Blvd., #11016				
Bowling Green, Kentucky 42101-1026				
<u>World Relief DuPage/Aurora</u>				
World Relief DuPage/Aurora	PC	A third-year grant of support to provide specialized mental health services for older refugees residing in DuPage and and maintain independence	1/13/2017	\$22,500
1825 College Avenue, Suite 230				
Wheaton, Illinois 60187				
World Relief DuPage/Aurora	PC	A third-year grant of support to provide specialized mental health services for older refugees residing in DuPage and Kane counties to help them achieve and maintain independence	4/14/2017	\$22,500
1825 College Avenue, Suite 230				
Wheaton, Illinois 60187				
Grand Total				\$ 2,480,923