



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

OMB No 1545-0052
2016
Open to Public Inspection

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

Name of foundation STEANS FAMILY FOUNDATION		A Employer identification number 36-3486843	
Number and street (or P O box number if mail is not delivered to street address) Room/suite 50 E WASHINGTON STREET No 400		B Telephone number (see instructions) (312) 467-5900	
City or town, state or province, country, and ZIP or foreign postal code CHICAGO, IL 60602		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ 30,594,810		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
J Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis)			

Part I Analysis of Revenue and Expenses <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</i>		(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)	4,734,046			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	57,025	57,025		
	4 Dividends and interest from securities	751,142	751,142		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	10,167,003			
	b Gross sales price for all assets on line 6a	14,606,920			
	7 Capital gain net income (from Part IV, line 2)		10,130,330		
	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)	40,565	62,346			
12 Total. Add lines 1 through 11	15,749,781	11,000,843			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	148,000	0		148,000
	14 Other employee salaries and wages	527,540	0		527,540
	15 Pension plans, employee benefits	11,578	0		11,578
	16a Legal fees (attach schedule)	44,801	0		44,801
	b Accounting fees (attach schedule)	2,757	0		2,757
	c Other professional fees (attach schedule)	205,611	150,073		55,538
	17 Interest	1,403	0		1,403
	18 Taxes (attach schedule) (see instructions)	143,792	0		143,792
	19 Depreciation (attach schedule) and depletion	83,104	0		
	20 Occupancy	5,485	0		5,485
	21 Travel, conferences, and meetings	5,804	0		5,804
	22 Printing and publications				
	23 Other expenses (attach schedule)	867,121	0		867,121
	24 Total operating and administrative expenses. Add lines 13 through 23	2,046,996	150,073		1,813,819
	25 Contributions, gifts, grants paid	4,635,880			4,910,562
26 Total expenses and disbursements. Add lines 24 and 25	6,682,876	150,073		6,724,381	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	9,066,905				
b Net investment income (if negative, enter -0-)		10,850,770			
c Adjusted net income (if negative, enter -0-)					

Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing	42,017	10,048,060	10,048,060
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶ <u>29,777</u>			
	Less allowance for doubtful accounts ▶ _____	8,781	29,777	29,777
	4 Pledges receivable ▶ _____			
	Less allowance for doubtful accounts ▶ _____			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ <u>329,910</u>			
	Less allowance for doubtful accounts ▶ _____ 0	704,820	329,910	329,910
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	8,693	109,734	109,734
	10a Investments—U S and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)	6,361,280	7,611,251	15,243,012
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment basis ▶ _____			
Less accumulated depreciation (attach schedule) ▶ _____				
12 Investments—mortgage loans				
13 Investments—other (attach schedule)	5,645,202	2,765,458	1,485,908	
14 Land, buildings, and equipment basis ▶ <u>4,248,186</u>				
Less accumulated depreciation (attach schedule) ▶ <u>948,445</u>	3,372,827	3,299,741	3,299,741	
15 Other assets (describe ▶ _____)	14,949	48,668	48,668	
16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	16,158,569	24,242,599	30,594,810	
Liabilities	17 Accounts payable and accrued expenses	60,446	206,845	
	18 Grants payable.	500,682	195,000	
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule).			
	22 Other liabilities (describe ▶ _____)	831,022	7,430	
	23 Total liabilities (add lines 17 through 22)	1,392,150	409,275	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted	14,766,419	23,833,324	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here <input type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg, and equipment fund			
29 Retained earnings, accumulated income, endowment, or other funds				
30 Total net assets or fund balances (see instructions)	14,766,419	23,833,324		
31 Total liabilities and net assets/fund balances (see instructions) .	16,158,569	24,242,599		

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	14,766,419
2 Enter amount from Part I, line 27a	2	9,066,905
3 Other increases not included in line 2 (itemize) ▶ _____	3	0
4 Add lines 1, 2, and 3	4	23,833,324
5 Decreases not included in line 2 (itemize) ▶ _____	5	0
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	23,833,324

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)
1 a PUBLICLY TRADED STOCKS - long term	P		
b FROM PASSTHROUGH K-1S	P		
c PUBLICLY TRADED STOCKS - short term	P		
d INVESTMENT IN BRAUVIN NET LEASE, INC	P		
e US AMERIBANCORP	P		2016-06-30

(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 12,551,762		2,706,105	9,845,657
b		143,087	-143,087
c		5,773	-5,773
d 1,180,158		746,625	433,533
e 875,000		875,000	0

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			9,845,657
b			-143,087
c			-5,773
d			433,533
e			0

2 Capital gain net income or (net capital loss)	2	10,130,330
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? Yes No
 If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2015	5,578,180	20,102,350	0.277489
2014	2,535,651	20,461,703	0.123922
2013	2,680,094	18,505,449	0.144827
2012	3,802,792	15,281,285	0.248853
2011	2,707,589	17,531,957	0.154437

2 Total of line 1, column (d)	2	0.949528
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	0.189906
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	17,561,639
5 Multiply line 4 by line 3	5	3,335,061
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	108,508
7 Add lines 5 and 6	7	3,443,569
8 Enter qualifying distributions from Part XII, line 4	8	6,724,381

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)

Table with 11 rows for excise tax calculations. Includes categories like 'Exempt operating foundations', 'Domestic foundations that meet the section 4940(e) requirements', and 'Tax based on investment income'. Total amount owed is 285,252.

Part VII-A Statements Regarding Activities

Table with 10 rows for activity statements. Questions include 'During the tax year, did the foundation attempt to influence any national, state, or local legislation?', 'Did it spend more than \$100 during the year for political purposes?', and 'Did the foundation have at least \$5,000 in assets at any time during the year?'. Includes Yes/No columns.

Part VII-A Statements Regarding Activities (continued)

11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions). 11 No
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions) 12 No
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address STEANSFAMILYFOUNDATION.ORG 13 Yes
14 The books are in care of DAVE GERVASE Telephone no (312) 235-4521
Located at 50 E WASHINGTON STREET SUITE 400 CHICAGO IL ZIP+4 60602
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 -Check here 15
16 At any time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes," enter the name of the foreign country 16 Yes No

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

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

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

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

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

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

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

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

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

b If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? Yes No
 Organizations relying on a current notice regarding disaster assistance check here.

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? Yes No
 If "Yes," attach the statement required by Regulations section 53.4945–5(d)

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

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? Yes No
 If "Yes" to 6b, file Form 8870

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

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? Yes No

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).

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

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

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

Total number of other employees paid over \$50,000. 0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
FINANCIAL INVESTMENT CORPORATION 50 E WASHINGTON ST SUITE 400 CHICAGO, IL 60602	CONSULTING FEES	150,073
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 grant making and programs intended to revitalize the north lawndale neighborhood on chicago's west side	1,395,878
2 _____	
3 _____	
4 _____	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 _____	
2 _____	
All other program-related investments. See instructions	
3 _____	
Total. Add lines 1 through 3 ▶	0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities.	1a	11,902,741
b	Average of monthly cash balances.	1b	1,746,491
c	Fair market value of all other assets (see instructions).	1c	4,179,843
d	Total (add lines 1a, b, and c).	1d	17,829,075
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	17,829,075
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	267,436
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	17,561,639
6	Minimum investment return. Enter 5% of line 5.	6	878,082

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	878,082
2a	Tax on investment income for 2016 from Part VI, line 5.	2a	108,508
b	Income tax for 2016 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	108,508
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	769,574
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	769,574
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	769,574

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26.	1a	6,724,381
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	4	6,724,381
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	108,508
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	6,615,873

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				769,574
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.	1,847,351			
b From 2012.	3,128,004			
c From 2013.	2,128,640			
d From 2014.	1,590,888			
e From 2015.	4,662,304			
f Total of lines 3a through e.	13,357,187			
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ <u>6,724,381</u>				
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.				769,574
e Remaining amount distributed out of corpus	5,954,807			
5 Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a))				0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	19,311,994			
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).	1,847,351			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	17,464,643			
10 Analysis of line 9				
a Excess from 2012.	3,128,004			
b Excess from 2013.	2,128,640			
c Excess from 2014.	1,590,888			
d Excess from 2015.	4,662,304			
e Excess from 2016.	5,954,807			

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2016, enter the date of the ruling. ▶

b Check box to indicate whether the organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

	Tax year	Prior 3 years			(e) Total
	(a) 2016	(b) 2015	(c) 2014	(d) 2013	
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					

3 Complete 3a, b, or c for the alternative test relied upon

a "Assets" alternative test—enter

(1) Value of all assets

(2) Value of assets qualifying under section 4942(j)(3)(B)(i)

b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.

c "Support" alternative test—enter

(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).

(3) Largest amount of support from an exempt organization

(4) Gross investment income

Part XV Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see instructions.)

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

a The name, address, and telephone number or email address of the person to whom applications should be addressed

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

c Any submission deadlines

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

Part XV **Supplementary Information** (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> Grants- see attached list VARIOUS VARIOUS, IL 99999	NONE	PUBLIC	GENERAL SUPPORT	3,001,509
LEGACY CHARTER SCHOOL 4217 WEST 18TH STREET CHICAGO, IL 60623	NONE	PUBLIC	GENERAL SUPPORT	409,553
OTHER GRANTS VARIOUS VARIOUS, IL 99999	NONE	PC	GENERAL SUPPORT	1,499,500
Total ▶ 3a				4,910,562
b <i>Approved for future payment</i> NORTH LAWDALE COLLEGE PREPARATORY CHARTER HIGH SCHOOL 1615 S CHRISTINA AVE CHICAGO, IL 60623	NONE	PUBLIC	GENERAL SUPPORT	75,000
NORTH LAWDALE COLLEGE PREPARATORY CHARTER HIGH SCHOOL - SALARY FUND 1615 S CHRISTINA AVE CHICAGO, IL 60623	NONE	PUBLIC	GENERAL SUPPORT	120,000
Total ▶ 3b				195,000

Form 990FP Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
HARRISON I STEANS 1900 MEADOW LANE BANNOCKBURN, IL 60015	TRUSTEE 5 00	0	0	0
LOIS STEANS 1900 MEADOW LANE BANNOCKBURN, IL 60015	TRUSTEE 5 00	0	0	0
HEATHER STEANS 5348 N LAKEWOOD CHICAGO, IL 60640	TRUSTEE 30 00	0	0	0
ROBIN STEANS 440 W BELDEN CHICAGO, IL 60614	TRUSTEE 30 00	0	0	0
JENNIFER STEANS 2324 LINCOLNWOOD EVANSTON, IL 60201	TRUSTEE 5 00	0	0	0
JIM KASTENHOLZ 2324 LINCOLNWOOD EVANSTON, IL 60201	TRUSTEE 5 00	0	0	0
LEO SMITH 5348 N LAKEWOOD CHICAGO, IL 60640	TRUSTEE 5 00	0	0	0
LENNY GAIL 440 W BELDEN CHICAGO, IL 60614	TRUSTEE 5 00	0	0	0
PATRICIA FORD 5849 W RACE AVE CHICAGO, IL 60644	EXECUTIVE DIRECTOR 40 00	148,000	5,052	0
reginald jones 50 E WASHINGTON STREET SUITE 400 CHICAGO, IL 60602	trustEE 5 00	0	0	0

Form 990PF Part XVI-A Line 11 - Other revenue:

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See the instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
11 Other revenue					
a via K-1 ordinary income		-21,781	16	0	
b via K-1 other income			16	5	
c via K-1 interest income			14	11	
d via K-1 dividend income			14	152	
e RENT INCOME - MORRISON FOUNDATION			14	63,812	
f VIA K-1 PORTFOLIO DEDUCTIONS			16	-1,634	

TY 2016 Accounting Fees Schedule**Name:** STEANS FAMILY FOUNDATION**EIN:** 36-3486843

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
accounting fees	2,757	0		2,757

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

TY 2016 Depreciation Schedule

Name: STEANS FAMILY FOUNDATION

EIN: 36-3486843

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
GARLAND OFFICE	2008-01-01	2,672,455	545,337	SL	39 0000000000000	68,524	0		
GARLAND OFFICE - FURNITURE AND FIXTURES	2008-01-01	186,391	186,391	200DB	7 0000000000000	0	0		
GARLAND OFFICE - IT EQUIPMENT	2008-01-01	49,853	49,853	200DB	5 0000000000000	0	0		
COMMUNITY FAC - 1606 CHRISTIANA	2007-10-30	30,000		L		0	0		
RL ACQUISITIONS - 4338-46 w 18TH ST	2007-11-15	130,000		L		0	0		
RL ACQUISITIONS - 1626 S CHRISTIANA	2008-01-24	35,000		L		0	0		
RL ACQUISITIONS - 4343 w 18TH ST	2008-01-16	85,000		L		0	0		
COMMUNITY FAC - 1600-02 CHRISTIANA	2008-10-08	90,000		L		0	0		
PARKING SPACES - HERITAGE	2008-01-01	300,000	61,216	SL	39 0000000000000	7,692	0		
Furniture and fixtures	2009-04-28	6,458	3,085	200DB	7 0000000000000	144	0		
Computer equipment - server	2009-04-03	3,203	1,601	200DB	5 0000000000000	0	0		
COMMUNITY FAC - 1642 S SPAULDING	2011-01-01	140,000		L		0	0		
COMMUNITY FAC - 1641 S CHRISTIANA	2011-01-01	300,000		L		0	0		
COMMUNITY FAC - 1643 S CHRISTIANA	2011-01-01	35,000		L		0	0		
COMMUNITY FAC - 1640 S SPAULDING	2011-10-19	115,000		L		0	0		
communiTY FAC - 1638 s spaulding	2012-06-07	44,950		L		0	0		
card key system	2013-03-01	5,432	1,934	200DB	5 0000000000000	313	0		
phone system	2013-08-16	7,286	2,594	200DB	5 0000000000000	420	0		
GARLAND OFFICE - IT EQUIPMENT	2016-06-29	10,018		200DB	5 0000000000000	6,011	0		

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

TY 2016 Expenditure Responsibility Statement

Name: STEANS FAMILY FOUNDATION

EIN: 36-3486843

Grantee's Name	Grantee's Address	Grant Date	Grant Amount	Grant Purpose	Amount Expended By Grantee	Any Diversion By Grantee?	Dates of Reports By Grantee	Date of Verification	Results of Verification
NORTH CHICAGO COMMUNITY PARTNERS	855 Skokie Highway Suite D Lake Bluff, IL 60044	2016-12-27	60,000	Support of North Chicago Community Partners (NCCP) to expand capacity in key areas	60,000	NO PART HAS BEEN USED FOR OTHER THAN ITS INTENDED PURPOSE	8/25/2017 - NARRATIVE & FINANCIAL REPORT	2017-08-25	

TY 2016 Investments Corporate Stock Schedule**Name:** STEANS FAMILY FOUNDATION**EIN:** 36-3486843

Name of Stock	End of Year Book Value	End of Year Fair Market Value
jp morgan	32,426	1,924,267
DESWELL INDUSTRIES	629,560	140,175
FIRST HORIZON	614,332	2,962,260
BANK OF AMERICA	1,107,502	1,227,213
INTEL CORPORATION	1,038,985	1,523,340
DISCOVER FINANCIAL SERVICES	393	27,827
ibm - cost	1,876,393	1,659,900
cedar hill - cash	56,654	56,654
cedar hill - cost	935,561	998,376
MB FINANCIAL	1,319,445	4,723,000

TY 2016 Investments - Other Schedule

Name: STEANS FAMILY FOUNDATION

EIN: 36-3486843

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
WAVELAND PARTNERS LP	AT COST	16,116	5,428
FIC INCOME PARTNERSHIP	AT COST	115,883	14,072
lawndale gateway	AT COST	0	0
BRAUVIN NET LEASE INC	AT COST	0	0
USAB - PREFERRED SERIES A	AT COST	0	0
BOULEVARD HEALTHCARE	AT COST	67,114	72,129
EVERGREEN HEALTHCARE	AT COST	0	29,072
BRAUVIN NET LEASE INC - FUND II	AT COST	861,267	861,267
cic bancshares	AT COST	0	0
usab	AT COST	131,250	358,750
atlantic creek re fund ii	AT COST	804,346	0
ascendance cap partners ii	AT COST	675,395	0
FBHS - COST	AT COST	219	51,322
atlantic creek re fund iiI	AT COST	93,868	93,868

**TY 2016 Land, Etc.
Schedule**

Name: STEANS FAMILY FOUNDATION

EIN: 36-3486843

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
GARLAND OFFICE	2,672,455	613,861	2,058,594	
GARLAND OFFICE - FURNITURE AND FIXTURES	186,391	186,391	0	
GARLAND OFFICE - IT EQUIPMENT	49,853	49,853	0	
COMMUNITY FAC - 1606 CHRISTIANA	30,000	0	30,000	
RL ACQUISITIONS - 4338-46 w. 18TH ST	130,000	0	130,000	
RL ACQUISITIONS - 1626 S. CHRISTIANA	35,000	0	35,000	
RL ACQUISITIONS - 4343 w. 18TH ST	85,000	0	85,000	
COMMUNITY FAC - 1600-02 CHRISTIANA	90,000	0	90,000	
PARKING SPACES - HERITAGE	300,000	68,908	231,092	
Furniture and fixtures	6,458	6,458	0	
software	2,140	2,140	0	
Computer equipment - server	3,203	3,203	0	
COMMUNITY FAC - 1642 S. SPAULDING	140,000	0	140,000	
COMMUNITY FAC - 1641 S. CHRISTIANA	300,000	0	300,000	
COMMUNITY FAC - 1643 S. CHRISTIANA	35,000	0	35,000	
COMMUNITY FAC - 1640 S. SPAULDING	115,000	0	115,000	
community FAC - 1638 s. spaulding	44,950	0	44,950	
card key system	5,432	4,963	469	
phone system	7,286	6,657	629	
GARLAND OFFICE - IT EQUIPMENT	10,018	6,011	4,007	

TY 2016 Legal Fees Schedule**Name:** STEANS FAMILY FOUNDATION**EIN:** 36-3486843

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
legal fees	44,801	0		44,801

TY 2016 Other Assets Schedule**Name:** STEANS FAMILY FOUNDATION**EIN:** 36-3486843**Other Assets Schedule**

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
DEPOSITS	12,940	12,940	12,940
transit clearing	227	-276	-276
prepaid taxes/refund receivable	819	0	0
OTHER ASSETS	380	0	0
DUE FROM ADVANCE ILLINOIS	583	0	0
CLEARING	0	-256	-256
DUE FROM FIC	0	355	355
DUE FROM PHOENIX PACT	0	35,500	35,500
DUE FROM MASSEY & GAIL	0	405	405

TY 2016 Other Expenses Schedule**Name:** STEANS FAMILY FOUNDATION**EIN:** 36-3486843**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
filing fees	360	0		360
training	5,752	0		5,752
postage and shipping	1,110	0		1,110
business insurance	21,970	0		21,970
utilities and telephone	131	0		131
office supplies	17,652	0		17,652
WEBSITE	605	0		605
meals and entertainment	10,305	0		10,305
temporary hiring	2,805	0		2,805
ASSESSMENTS	105,014	0		105,014

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
SOFTWARE MAINTENANCE - GIFTS PROGRAM	16,050	0		16,050
PROGRAM RELATED - LEGAL EXPENSES	4,550	0		4,550
DUES AND SUBSCRIPTIONS	5,563	0		5,563
proGRAM RELATED - BUSINESS INSURANCE	1,363	0		1,363
PROGRAM RELATED - REAL ESTATE TAXES	17,962	0		17,962
MISCELLANEOUS	2,377	0		2,377
PRoGRAM RELATED - SPECIAL OPS	7,597	0		7,597
PROGRAM RELATED - LAND maintenance Fees	17,410	0		17,410
PROGRAM RELATED - SPONSORSHIPS	1,500	0		1,500
printing	519	0		519

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
COGENT	1,335	0		1,335
GLOBALCOM	3,137	0		3,137
VERIZON	1,961	0		1,961
maintenance & repairs	2,141	0		2,141
recognition & gifts	3,444	0		3,444
BANK CHARGES	50	0		50
BAD DEBT EXPENSE	314,910	0		314,910
health insurance	17,422	0		17,422
program related - miscellaneous	250	0		250
program related - meals & entertainment	16,951	0		16,951

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
program related - north chicago	108,233	0		108,233
program related - community stabilization	56,143	0		56,143
program related - nonprofit event tickets	3,118	0		3,118
program related - college readiness, enroll, comp	30,328	0		30,328
program related - nl reads	34,780	0		34,780
program related - school based ed	4,513	0		4,513
program related - consulting	27,810	0		27,810

TY 2016 Other Income Schedule**Name:** STEANS FAMILY FOUNDATION**EIN:** 36-3486843**Other Income Schedule**

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
via K-1 ordinary income	-21,781	0	-21,781
via K-1 other income	5	5	5
via K-1 interest income	11	11	11
via K-1 dividend income	152	152	152
RENT INCOME - MORRISON FOUNDATION	63,812	63,812	63,812
VIA K-1 PORTFOLIO DEDUCTIONS	-1,634	-1,634	-1,634

TY 2016 Other Liabilities Schedule**Name:** STEANS FAMILY FOUNDATION**EIN:** 36-3486843

Description	Beginning of Year - Book Value	End of Year - Book Value
UBS LOAN	831,022	0
K-1 - EVERGREEN HEALTHCARE	0	7,430

TY 2016 Other Professional Fees Schedule**Name:** STEANS FAMILY FOUNDATION**EIN:** 36-3486843

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
professional services	55,538	0		55,538
FINANCIAL ADVISOR FEES	150,073	150,073		0

TY 2016 Taxes Schedule**Name:** STEANS FAMILY FOUNDATION**EIN:** 36-3486843

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
payroll taxes	33,205	0		33,205
excise tax	110,587	0		110,587

Schedule B
(Form 990, 990-EZ,
or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors
▶ Attach to Form 990, 990-EZ, or 990-PF
▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at
www.irs.gov/form990

OMB No 1545-0047
2016

Name of the organization
STEANS FAMILY FOUNDATION

Employer identification number
36-3486843

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

- 501(c)() (enter number) organization
- 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

Form 990-PF

- 527 political organization
- 501(c)(3) exempt private foundation
- 4947(a)(1) nonexempt charitable trust treated as a private foundation
- 501(c)(3) taxable private foundation

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

General Rule

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

Special Rules

- For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹ 3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals Complete Parts I, II, and III
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc , purposes, but no such contributions totaled more than \$1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc , contributions totaling \$5,000 or more during the year ▶ \$ _____

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Name of organization STEANS FAMILY FOUNDATION	Employer identification number 36-3486843
---	---

Part I			
Contributors (see instructions) Use duplicate copies of Part I if additional space is needed			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	HARRISON I STEANS 50 e washington street 400 Chicago, IL60602	\$ 4,668,674	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
2	ROBIN STEANS 50 e washington street 400 Chicago, IL60602	\$ 14,075	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
3	JENNIFER STEANS 50 e washington street 400 Chicago, IL60602	\$ 6,779	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
4	HEATHER STEANS 50 e washington street 400 Chicago, IL60602	\$ 11,209	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
5	PHILIP LOUDEN 50 e washington street 400 Chicago, IL60602	\$ 1,350	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
6	HARRISON I STEANS 50 e washington street 400 chicago, IL60602	\$ 31,959	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)

Name of organization STEANS FAMILY FOUNDATION	Employer identification number 36-3486843
---	---

Part II Noncash Property

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
(see instructions) Use duplicate copies of Part II if additional space is needed			
1	36,000 SHS JPM (COST \$50,616, FMV \$2,306,000)350,000 SHS MBFI (COST \$4,618,058, FMV \$15,771,250)	\$ 18,077,250	2016-12-12
2	480 SHS JPM (COST \$656, FMV \$30,000)16,776 SHS FHN (COST \$13,419, FMV \$337,532)	\$ 367,532	2016-12-06
3	4,900 SHS JPM (COST \$6,779, FMV \$409,016)	\$ 409,016	2016-12-12
4	2,122 SHS JPM (COST \$4,172, FMV \$179,977)8,800 SHS FHN (COST \$7,037, FMV \$173,316)	\$ 353,293	2016-12-19
_____	_____	\$ _____	_____
_____	_____	\$ _____	_____

Name of organization STEANS FAMILY FOUNDATION	Employer identification number 36-3486843
---	---

Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ▶ \$ _____
Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____	_____	_____
	_____	_____	_____

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

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____	_____	_____
	_____	_____	_____

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

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____	_____	_____
	_____	_____	_____

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

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____	_____	_____
	_____	_____	_____

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