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

Name of foundation GLOBE FOUNDATION		A Employer identification number 36-6054050	
Number and street (or P O box number if mail is not delivered to street address) 6730 N SCOTTSDALE ROAD NO 250		Room/suite	B Telephone number (see instructions) (480) 991-0500
City or town, state or province, country, and ZIP or foreign postal code SCOTTSDALE, AZ 852534416		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 27,429,882		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis)			

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)	834,948			
	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 . . .	354,338	352,540		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	771,079			
	b Gross sales price for all assets on line 6a 3,452,271				
	7 Capital gain net income (from Part IV, line 2) . . .		800,833		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	1,960,365	1,153,373		
	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	6,350	0		0
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	61,636	61,622		14
	24 Total operating and administrative expenses. Add lines 13 through 23	67,986	61,622		14
	25 Contributions, gifts, grants paid	2,097,440			1,782,872
	26 Total expenses and disbursements. Add lines 24 and 25	2,165,426	61,622		1,782,886
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-205,061			
	b Net investment income (if negative, enter -0-)		1,091,751		
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 (a) Book Value	End of year (b) Book Value (c) Fair Market Value		
Assets	1	Cash—non-interest-bearing	2,619	11,360	11,360
	2	Savings and temporary cash investments	767,671	321,493	321,493
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	11,862,474	13,038,412	17,165,394
	c	Investments—corporate bonds (attach schedule)	7,070,434	7,144,687	6,674,660
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	2,347,014	1,634,447	2,396,026
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)	9,531	19,323	860,949	
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	22,059,743	22,169,722	27,429,882	
Liabilities	17	Accounts payable and accrued expenses	5,768	6,240	
	18	Grants payable.			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule).			
	22	Other liabilities (describe ▶ _____)	1,090,944	1,405,512	
	23	Total liabilities (add lines 17 through 22)	1,096,712	1,411,752	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ☐ and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ☒ and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds	19,206,497	19,206,497	
	28	Paid-in or capital surplus, or land, bldg, and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	1,756,534	1,551,473	
	30	Total net assets or fund balances (see instructions)	20,963,031	20,757,970	
31	Total liabilities and net assets/fund balances (see instructions) .	22,059,743	22,169,722		

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	20,963,031
2	Enter amount from Part I, line 27a	2	-205,061
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	20,757,970
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	20,757,970

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1 a PUBLICLY TRADED SECURITIES	P	2016-01-01	2016-12-31
b (AVAILABLE UPON REQUEST)	P		
c PUBLICLY TRADED SECURITIES	P	2015-12-31	2016-12-31
d (AVAILABLE UPON REQUEST)	P		
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 973,922		950,413	23,509
b			0
c 2,478,349		1,701,025	777,324
d			0
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) 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			23,509
b			0
c			777,324
d			0
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	800,833
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	1,856,986	27,300,436	0 068020
2014	1,914,967	28,736,546	0 066639
2013	1,947,721	27,079,382	0 071926
2012	1,847,379	25,197,875	0 073315
2011	1,699,151	26,215,089	0 064816

2 Total of line 1, column (d)	2	0 344716
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 068943
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	25,514,321
5 Multiply line 4 by line 3	5	1,759,034
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	10,918
7 Add lines 5 and 6	7	1,769,952
8 Enter qualifying distributions from Part XII, line 4	8	1,782,886

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b	1	10,918
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	10,918
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	10,918
6	Credits/Payments		
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a	8,982
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d.	7	8,982
8	Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed ▶	9	1,936
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid . . . ▶	10	
11	Enter the amount of line 10 to be Credited to 2017 estimated tax ▶ Refunded ▶	11	

Part VII-A Statements Regarding Activities

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

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	Yes	
14	The books are in care of ► FOUNDATION CO GEORGE GETZ Telephone no ► (480) 991-0500			

Located at ► 6730 N SCOTTSDALE ROAD STE 250 SCOTTSDALE AZ

ZIP+4 ► 85253

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here	☐		
	and enter the amount of tax-exempt interest received or accrued during the year	► 15		
16	At any time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
	See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes," enter the name of the foreign country ►			

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required**File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.**

1a	During the year did the foundation (either directly or indirectly)		Yes	No
	(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		
	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		
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

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	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?		6b	No
	If "Yes" to 6b, file Form 8870			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes ☒ No		
	b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?		7b	

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

[illegible][illegible]

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.		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	
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	25,079,273
b	Average of monthly cash balances.	1b	823,591
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	25,902,864
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	25,902,864
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	388,543
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	25,514,321
6	Minimum investment return. Enter 5% of line 5.	6	1,275,716

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	1,275,716
2a	Tax on investment income for 2016 from Part VI, line 5.	2a	10,918
b	Income tax for 2016 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	10,918
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	1,264,798
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	1,264,798
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	1,264,798

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	1,782,886
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	1,782,886
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	10,918
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	1,771,968

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				1,264,798
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.	418,451			
b From 2012.	604,879			
c From 2013.	650,976			
d From 2014.	546,756			
e From 2015.	517,500			
f Total of lines 3a through e.	2,738,562			
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ <u>1,782,886</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.				1,264,798
e Remaining amount distributed out of corpus	518,088			
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	3,256,650			
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).	418,451			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	2,838,199			
10 Analysis of line 9				
a Excess from 2012.	604,879			
b Excess from 2013.	650,976			
c Excess from 2014.	546,756			
d Excess from 2015.	517,500			
e Excess from 2016.	518,088			

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))

BERT A GETZ

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> See Additional Data Table				
Total ► 3a				1,717,872
b <i>Approved for future payment</i> NORTH SHORE COUNTRY DAY SCHOOL 310 GREEN BAY ROAD WINNETKA, IL 60093		PUBLIC	GENERAL FUND	125,000
UNIVERSITY OF SOUTHER CALIFORNIA USC CAMPUS - UNIVERSITY ADVANCEMENT LOS ANGELES, CA 90089		PUBLIC	GENERAL FUND	350,000
MICHIGAN ROSS SCHOOL OF BUSINESS 701 TAPPAN STREET ANN ARBOR, MI 48109		PUBLIC	GENERAL FUND	400,000
Total ► 3b				875,000

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments. . . .					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities. . . .			14	354,338	
5 Net rental income or (loss) from real estate					
a Debt-financed property.					
b Not debt-financed property.					
6 Net rental income or (loss) from personal property					
7 Other investment income.					
8 Gain or (loss) from sales of assets other than inventory			18	771,079	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a _____					
b _____					
c _____					
d _____					
e _____					
12 Subtotal Add columns (b), (d), and (e). .		0		1,125,417	0
13 Total. Add line 12, columns (b), (d), and (e).			13		1,125,417

(See worksheet in line 13 instructions to verify calculations)

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

[illegible]

Part XVII

- | | Yes | No |
|-------|-----|----|
| 1a(1) | | No |
| 1a(2) | | No |
| 1b(1) | | No |
| 1b(2) | | No |
| 1b(3) | | No |
| 1b(4) | | No |
| 1b(5) | | No |
| 1b(6) | | No |
| 1c | | No |

[illegible]

- | b If "Yes," complete the following schedule | | |
|---|--------------------------|---------------------------------|
| (a) Name of organization | (b) Type of organization | (c) Description of relationship |
| MERIT CLUB | SEC 501(C)(7) | COMMON BOARD MEMBERS |
| | | |
| | | |
| | | |

**Sign
Here**

May the IRS discuss this return with the preparer shown below (see instr)? ☒ Yes ☐ No

**Paid
Preparer
Use Only**

Form 990PF 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
BERT A GETZ	PRESIDENT/DIRECTOR 0 00	0	0	0
6335 WEST STATE ROUTE 120 LIBERTYVILLE, IL 60048				
LYNN GETZ-SCHMIDT	VICE PRESIDENT/DIRECTOR 0 00	0	0	0
2437 NW OVERTON STREET PORTLAND, OR 97210				
GEORGE F GETZ	SECRETARY/DIRECTOR 0 00	0	0	0
5223 E PALO VERDE PL PARADISE VALLEY, AZ 85253				
JAMES L JOHNSON	DIRECTOR 0 00	0	0	0
177 W BOLERO DRIVE TEMPE, AZ 85284				
MICHAEL J OLSEN	TREASURER/ASST SECRETARY 0 00	0	0	0
9103 N 96TH PLACE SCOTTSDALE, AZ 85258				
ROCK S EDWARDS	DIRECTOR 0 00	0	0	0
1051 PERIMETER DRIVE SUITE 550 SCHAUMBERG, IL 60173				
BERT A GETZ JR	VICE PRESIDENT/DIRECTOR 0 00	0	0	0
225 SHADOWOOD LANE NORTHFIELD, IL 60093				

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
AMERICAN RED CROSS- METZ FUND 2200 WEST HARRISON STREET CHICAGO, IL 60612		PUBLIC	GENERAL FUND	7,500
ARIZONA STATE UNIVERSITY PO BOX 2260 TEMPE, AZ 852802260		PUBLIC	GENERAL FUND	7,000
AVON OLD FARMS 500 OLD FARMS ROAD AVON, CT 06001		PUBLIC	GENERAL FUND	5,000
BOY SCOUTS OF AMERICA - METZ FUND 1218 W ADAMS ST CHICAGO, IL 60607		PUBLIC	GENERAL FUND	7,500
BROPHY COLLEGE PREPARATORY 4701 N CENTRAL AVE PHOENIX, AZ 85012		PUBLIC	GENERAL FUND	10,000
CHICAGO BOTANIC GARDEN 1000 LAKE COOK ROAD GLENCOE, IL 60022		PUBLIC	GENERAL FUND	1,000
CHICAGO HOPE ACADEMY - METZ FUND 2189 W BOWLER ST CHICAGO, IL 60612		PUBLIC	GENERAL FUND	7,500
CHICAGO LIGHTHOUSE FOR THE BLIND - METZ FUND 1850 W ROOSEVELT RD CHICAGO, IL 60608		PUBLIC	GENERAL FUND	7,500
CHICAGO ZOOLOGICAL SOCIETY BROOKFIELD ZOO BROOKFIELD, IL 60513		PUBLIC	ENDOWMENT FUND	15,000
COMMONWEAL PO BOX 316 BOLINAS, CA 94924		PUBLIC	GENERAL FUND	5,000
CONSERVE LAKE COUNTY 32400 N HARRIS ROAD GRAYSLAKE, IL 60030		PUBLIC	GENERAL FUND	5,000
DESERT VOICES OF ORAL LEARNING CENTER 3426 E SHEA BLVD PHOENIX, AZ 85028		PUBLIC	GENERAL FUND	25,000
EVANS SCHOLAR FOUNDATION ONE BRIAR ROAD GOLF, IL 60029		PUBLIC	GENERAL FUND	10,000
GEORGE WASHINGTON'S FEDRICKSBURG FOUNDATION 1201 WASHINGTON AVENUE FREDERICKSBURG, VA 22401		PUBLIC	GENERAL FUND	30,000
GLOBE CORP EMPLOYEE MATCHING GIFTS - DETAILS AVAILABLE UPON REQUEST 6730 N SCOTTSDALE ROAD STE 250 SCOTTSDALE, AZ 85253		PUBLIC	GENERAL FUND	27,760
Total ►				1,717,872
3a				

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
HADLEY SCHOOL FOR THE BLIND - METZ FUND 700 ELM ST WINNETKA, IL 60093		PUBLIC	GENERAL FUND	7,500
HEARTLAND ALLIANCE - METZ FUND 208 S LASALLE ST 1818 CHICAGO, IL 60604		PUBLIC	GENERAL FUND	7,500
HOPE COLLEGE 141 E 12TH STREET HOLLAND, MI 49422		PUBLIC	GENERAL FUND	1,000
INFANT WELFARE SOCIETY - METZ FUND 3600 W FULLERTON AVE CHICAGO, IL 60647		PUBLIC	GENERAL FUND	7,500
JUNIOR GOLF ASSOCIATION OF ARIZONA 10888 N 19TH AVENUE PHOENIX, AZ 85029		PUBLIC	GENERAL FUND	15,000
LAKE GEORGE LAND CONSERVANCY 4905 LAKE SHORE DRIVE BOLTON LANDING, NY 12814		PUBLIC	GENERAL FUND	1,000
LAWRENCEVILLE SCHOOL PO BOX 6125 LAWRENCEVILLE, NJ 08648		PUBLIC	GENERAL FUND	30,000
LOYOLA ACADEMY 1100 LARAMIE AVENUE WILMETTE, IL 60091		PUBLIC	GENERAL FUND	55,000
MARYVILLE ACADEMY 1150 N RIVER ROAD DES PLAINES, IL 60016		PUBLIC	GENERAL FUND	1,000
MAYO CLINIC 13400 EAST SHEA BOULEVARD SCOTTSDALE, AZ 85259		PUBLIC	GENERAL FUND	200,000
NATIONAL HISTORICAL FIRE FOUNDATION 6730 N SCOTTSDALE ROAD STE 250 SCOTTSDALE, AZ 85253		PRIVATE	OPERATING NEEDS	350,000
NORTH SHORE COUNTRY DAY SCHOOL 310 GREEN BAY ROAD WINNETKA, IL 60093		PUBLIC	GENERAL FUND	128,000
NORTHWEST ACADEMY 1130 SW MAIN STREET PORTLAND, OR 97205		PUBLIC	GENERAL FUND	65,000
NORTHWESTERN MEMORIAL FOUNDATION - ALUMNAE CONTINUING EDUCATION - METZ FUND 251 EAST HURON STREET GALTER PAVILION SUITE 3-200 CHICAGO, IL 60611		PUBLIC	GENERAL FUND	7,500
NORTHWESTERN MEMORIAL FOUNDATION - CHICAGO MATERNITY CTR - METZ FUND 251 EAST HURON STREET GALTER PAVILION SUITE 3-200 CHICAGO, IL 60611		PUBLIC	GENERAL FUND	7,500
Total ►				1,717,872
3a				

Form 990PF Part XV Line 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>				
NORTHWESTERN MEMORIAL FOUNDATION - RESEARCH FUND - METZ FUND 251 EAST HURON STREET GALTER PAVILION SUITE 3-200 CHICAGO, IL 60611		PUBLIC	GENERAL FUND	7,500
NORTHWESTERN MEMORIAL FOUNDATION - UNRESTRICTED FUND - METZ FUND 251 EAST HURON STREET GALTER PAVILION SUITE 3-200 CHICAGO, IL 60611		PUBLIC	GENERAL FUND	7,500
NORTHWESTERN UNIVERSITY - ARM MEMORIAL - METZ FUND 2020 RIDGE AVENUE EVANSTON, IL 60208		PUBLIC	GENERAL FUND	15,000
NORTHWESTERN UNIVERSITY - MEDICAL SCHOOL FUND - METZ FUND 2020 RIDGE AVENUE EVANSTON, IL 60208		PUBLIC	GENERAL FUND	7,500
O'CONNOR HOUSE 4455 EAST CAMELBACK ROAD SUITE A215 PHOENIX, AZ 85018		PUBLIC	GENERAL FUND	5,000
OFF THE STREET CLUB - METZ FUND 25 N KARLOV AVE CHICAGO, IL 60624		PUBLIC	GENERAL FUND	7,500
PHOENIX CHILDREN'S HOSPITAL FOUNDATION 2929 E CAMELBACK RD 122 PHOENIX, AZ 85016		PUBLIC	GENERAL FUND	1,000
PORCHLIGHT COUNSELING SERVICES PO BOX 1080 EVANSTON, IL 60204		PUBLIC	GENERAL FUND	3,000
RAVINA FESTIVAL ASSOCIATION 418 SHERIDAN ROAD HIGHLAND PARK, IL 60035		PUBLIC	GENERAL FUND	4,000
REHAB INSTITUTE OF CHICAGO 345 EAST SUPERIOR STREET CHICAGO, IL 60611		PUBLIC	GENERAL FUND	78,700
SEMESTER AT SEA PO BOX 400885 CHARLOTTESVILLE, VA 229044885		PUBLIC	GENERAL FUND	3,000
SOUTHER METHODIST UNIVERSITY PO BOX 750402 DALLAS, TX 75275		PUBLIC	GENERAL FUND	2,500
ST JAMES THE LESS CHURCH 550 SUNSET RIDGE ROAD NORTHFIELD, IL 60093		PUBLIC	GENERAL FUND	25,000
THE ANTIQUARIAN SOCIETY 111 S MICHIGAN AVE CHICAGO, IL 60603		PUBLIC	GENERAL FUND	1,000
THE GLOBAL FOODBANKING NETWORK 203 N LASALLE STREET CHICAGO, IL 60601		PUBLIC	GENERAL FUND	1,000
Total ► 3a				1,717,872

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
UMOM NEW DAY CENTERS 3333 E VAN BUREN STREET PHOENIX, AZ 85008		PUBLIC	GENERAL FUND	50,000
UNITED FIRE FIGHTERS ASSOCIATION 61 E COLUMBUS AVE PHOENIX, AZ 85012		PUBLIC	GENERAL FUND	2,500
UNITED STATES OLYMPIC AND PARALYMPIC FOUNDATION 1 OLYMPIC PLAZA COLORADO SPRINGS, CO 80909		PUBLIC	GENERAL FUND	25,000
UNITED WAYALEXIS DE TOCQUEVILLE 1515 EAST OSBORN ROAD PHOENIX, AZ 85014		PUBLIC	GENERAL FUND	10,000
UNIVERSITY OF CHICAGO - MEDICAL ALUMNI FUND - METZ FUND 1427 EAST 60TH STREET SUITE 120 CHICAGO, IL 60637		PUBLIC	GENERAL FUND	7,500
UNIVERSITY OF MISSISSIPPI 406 UNIVERSITY AVENUE OXFORD, MS 38655		PUBLIC	GENERAL FUND	12,500
UNIVERSITY OF SOUTHER CALIFORNIA USC CAMPUS - UNIVERSITY ADVANCEMENT LOS ANGELES, CA 90089		PUBLIC	GENERAL FUND	151,500
XAVIER COLLEGE PREPARATORY 4710 N 5TH STREET PHOENIX, AZ 85012		PUBLIC	GENERAL FUND	50,000
HELP IN HEALING HOME FOUNDATION 5811 E MAYO BLVD PHOENIX, AZ 85054		PUBLIC	GENERAL FUND	25,000
HOSPICE OF THE VALLEY 1510 E FLOWER ST PHOENIX, AZ 85014		PUBLIC	GENERAL FUND	500
OREGON SYMPHONY 921 SW WASHINGTON STREET PORTLAND, OR 97205		PUBLIC	GENERAL FUND	130,612
PHOENIX ART MUSEUM 1625 N CENTRAL AVE PHOENIX, AZ 85004		PUBLIC	GENERAL FUND	1,500
ARIZONA HUMANE SOCIETY 1521 W DOBBINS ROAD PHOENIX, AZ 85041		PUBLIC	GENERAL FUND	1,000
ARIZONA JEWISH HISTORICAL SOCIETY 122 EAST CULVER STREET PHOENIX, AZ 85004		PUBLIC	GENERAL FUNDGENERAL FUND	1,000
NOTRE DAME PREPARATORY SAINTS' FUND 9701 EAST BELL ROAD SCOTTSDALE, AZ 85260		PUBLIC	GENERAL FUND	2,500
Total ► 3a				1,717,872

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
RYAN HOUSE 110 W MERRELL ST 1ST FLOOR PHOENIX, AZ 85013		PUBLIC	GENERAL FUND	1,000
SEAL NSW FAMILY FOUNDATION 300 CARLSBAD VILLAGE DRIVE CARLSBAD, CA 92008		PUBLIC	GENERAL FUND	1,000
TREASURE HOUSE 1 N FIRST STREET PHOENIX, AZ 85004		PUBLIC	GENERAL FUND	1,000
ALAN LOCKE CHARTER SCHOOL 3141 W JACKSON BLVD CHICAGO, IL 60612		PUBLIC	GENERAL FUND	300
GEORGE TOWN UNIVERSITY 2115 WISCONSIN AVE NW WASHINGTON, DC 20007		PUBLIC	GENERAL FUND	2,500
NAVY SEAL FOUNDATION 1619 D STREET VIRGINIA BEACH, VA 23459		PUBLIC	GENERAL FUND	2,500
CATHOLIC CHARITIES OF NORTHERN NEVADA 500 E FOURTH STREET RENO, NV 89512		PUBLIC	GENERAL FUND	2,500
BISHOP MANOGUE CATHOLIC HIGH SCHOOL 110 BISHOP MANOGUE DR RENO, NV 89511		PUBLIC	GENERAL FUND	2,500
SUMMIT SCHOOL 4515 MUIRWOOD DRIVE PHOENIX, AZ 85048		PUBLIC	GENERAL FUND	5,000
CLAN MACLEAN ASSOCIATION OF CALIFORNIA (DURANT APPEAL FUND) 5125 TULIP COURT LIVERMORE, CA 94551		PUBLIC	GENERAL FUND	5,000
Total ▶ 3a				1,717,872

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: GLOBE FOUNDATION

EIN: 36-6054050

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
NATIONAL HISTORIC FIRE FOUNDATION	6730 N SCOTTSDALE ROAD STE 250 SCOTTSDALE, AZ 85253	2015-12-31	340,000	TO OFFSET 2015 OPERATING EXPENSES OF GRANTEE'S AND/OR THE GRANTEE'S ADMINISTRATION, AND FOR THE MUSEUM PURCHASE OF EQUIPMENT AND OTHER FACILITIES FOR USE IN CONNECTION WITH THE EXEMPT OPERATING FUNCTION OF GRANTEE AND ITS MUSEUM		NO PART OF GRANT HAS BEEN USED FOR OTHER THAN ITS INTENDED PURPOSES	GRANTEE REPORTS IN 2016 ON USE OF 2015 FUNDS		
GLOBE CORPORATION	6730 N SCOTTSDALE ROAD STE 250 SCOTTSDALE, AZ 85253	2015-12-31	27,815	FOR GLOBE CORPORATION'S EMPLOYEE CONTRIBUTION MATCHING PROGRAM GLOBE CORPORATION'S EMPLOYEES MAKE DONATIONS TO VARIOUS QUALIFIED CHARITIES AND THE FUNDS GIVEN TO GLOBE CORPORATION ARE USED TO DONATE THE MATCHING AMOUNT TO THE CHARITY		NO PART OF GRANT HAS BEEN USED FOR OTHER THAN ITS INTENDED PURPOSES	GRANTEE REPORTS IN 2016 ON USE OF 2015 FUNDS		

TY 2016 Investments Corporate Bonds Schedule**Name:** GLOBE FOUNDATION**EIN:** 36-6054050

Name of Bond	End of Year Book Value	End of Year Fair Market Value
CORPORATE BONDS (DETAIL AVAILALBE UPON REQUEST)	7,144,687	6,674,660

TY 2016 Investments Corporate Stock Schedule

Name: GLOBE FOUNDATION

EIN: 36-6054050

Name of Stock	End of Year Book Value	End of Year Fair Market Value
INVESTMENTS (DETAIL AVAILABLE UPON REQUEST)	13,038,412	17,165,394

TY 2016 Investments - Other Schedule**Name:** GLOBE FOUNDATION**EIN:** 36-6054050

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
ALTERNATIVE INVESTMENTS (DETAIL AVAILABLE UPON REQUEST)	AT COST	1,634,447	2,396,026

TY 2016 Other Assets Schedule**Name:** GLOBE FOUNDATION**EIN:** 36-6054050**Other Assets Schedule**

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
NT ACCRUED DIVIDEND	17,462	26,633	26,633
NT ACCRUED INT	-7,931	-7,310	-7,310
RESIDENCE (REMAINDER INTEREST)			841,626

TY 2016 Other Expenses Schedule**Name:** GLOBE FOUNDATION**EIN:** 36-6054050**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
AGENCY FEES	24,550	24,550		0
OTHER INVESTMENT FEES	42,757	42,757		0
OTHER EXPENSES	35	21		14
LESS BROKER FEES REPORTED ON NHFF (36-6111510)	-5,706	-5,706		0

TY 2016 Other Liabilities Schedule**Name:** GLOBE FOUNDATION**EIN:** 36-6054050

Description	Beginning of Year - Book Value	End of Year - Book Value
PLEDGED CONTRIBUTIONS	1,090,944	1,405,512

TY 2016 Taxes Schedule**Name:** GLOBE FOUNDATION**EIN:** 36-6054050

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL TAXES	6,350	0		0

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 <u>www.irs.gov/form990</u>.	OMB No 1545-0047 2016
	Name of the organization GLOBE FOUNDATION	Employer identification number 36-6054050

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
	☐ 527 political organization
Form 990-PF	☒ 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 GLOBE FOUNDATION	Employer identification number 36-6054050
---	---

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	BERT A GETZ 6335 WEST STATE ROUTE 120 LIBERTYVILLE, IL 60048	\$ 834,948	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
-		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Name of organization GLOBE FOUNDATION	Employer identification number 36-6054050
---	---

Part II	Noncash Property
----------------	-------------------------

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	11,500 SHARES OF WINTRUST STOCK	\$ 834 948	2016-12-16
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	

Name of organization GLOBE FOUNDATION	Employer identification number 36-6054050
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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
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(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