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

Name of foundation VOGEL FOUNDATION INC		A Employer identification number 39-1639595	
Number and street (or P O box number if mail is not delivered to street address) PO BOX 7696		Room/suite	
City or town, state or province, country, and ZIP or foreign postal code MADISON, WI 537077696		B Telephone number (see instructions) (608) 241-5454	
G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here 2. Foreign organizations meeting the 85% test, check here and attach computation	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 534,699	J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here	

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	320			
	2 Check ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	2	2	2	
	4 Dividends and interest from securities . . .	10,548	10,548	10,548	
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	15,039			
	b Gross sales price for all assets on line 6a _____ 29,814				
	7 Capital gain net income (from Part IV, line 2) . . .		15,039		
	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	25,909	25,589	10,550	
	13 Compensation of officers, directors, trustees, etc	0	0	0	0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	1,395	1,395	0	0
	c Other professional fees (attach schedule)	3,918	3,918	0	0
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	285	285	0	0
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	89	0	0	0
	24 Total operating and administrative expenses. Add lines 13 through 23	5,687	5,598	0	0
	25 Contributions, gifts, grants paid	21,300			21,300
	26 Total expenses and disbursements. Add lines 24 and 25	26,987	5,598	0	21,300
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-1,078			
	b Net investment income (if negative, enter -0-)		19,991		
	c Adjusted net income (if negative, enter -0-) . . .			10,550	

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	269	2,770	2,770		
	2	Savings and temporary cash investments	22,031	24,410	24,410		
	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)					
	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)	382,788	379,599	507,519		
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____					
15	Other assets (describe ▶ _____)						
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	405,088	406,779	534,699			
Liabilities	17	Accounts payable and accrued expenses					
	18	Grants payable					
	19	Deferred revenue					
	20	Loans from officers, directors, trustees, and other disqualified persons					
	21	Mortgages and other notes payable (attach schedule)					
	22	Other liabilities (describe ▶ _____)	0	2,769			
	23	Total liabilities (add lines 17 through 22)	0	2,769			
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	0	0			
	28	Paid-in or capital surplus, or land, bldg, and equipment fund	0	0			
	29	Retained earnings, accumulated income, endowment, or other funds	405,088	404,010			
	30	Total net assets or fund balances (see instructions)	405,088	404,010			
31	Total liabilities and net assets/fund balances (see instructions) .	405,088	406,779				

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)	1 405,088
2	Enter amount from Part I, line 27a	2 -1,078
3	Other increases not included in line 2 (itemize) ▶ _____	3 0
4	Add lines 1, 2, and 3	4 404,010
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 .	6 404,010

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 ISHARES CORE S&P 500		2010-09-13	2016-12-12
b SPDR DOW JONES REIT		2010-09-13	2016-04-11
c VANGUARD CRSP US SM CAP		2010-09-13	2016-12-12
d VANGUARD CRSP US LG CAP		2010-09-13	2016-12-12
e VANGUARD CRSP US SM CAP		2010-09-13	2016-12-12

(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 7,285		3,622	3,663
b 1,510		936	574
c 5,317		2,501	2,816
d 6,857		3,608	3,249
e 8,845		4,108	4,737

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			3,663
b			574
c			2,816
d			3,249
e			4,737

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	15,039
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	0

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes☒ No

If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

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	23,706	442,599	0 053561
2014	67,362	424,912	0 158532
2013	26,740	434,032	0 061608
2012	24,085	443,531	0 054303
2011	22,310	459,792	0 048522

2 Total of line 1, column (d)	2	0 376526
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 075305
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	515,733
5 Multiply line 4 by line 3	5	38,837
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	200
7 Add lines 5 and 6	7	39,037
8 Enter qualifying distributions from Part XII, line 4	8	21,300

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	400
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	400
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	400
6	Credits/Payments		
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a	
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	0
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	400
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 ▶ \$ _____ 0 (2) On foundation managers ▶ \$ _____ 0		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ _____ 0		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities</i>	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	No
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) ▶ _____		
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 ► DAVID L VOGEL Telephone no ► (608) 241-5454			

Located at ► 2701 PACKERS AVE MADISON WI ZIP+4 ► 53704

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

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. ☐ Yes ☒ No 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)	5b		
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	6b		No
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	7b		

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

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).				
(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
DAVID L VOGEL PO BOX 7696 MADISON, WI 53707	PRESIDENT 5 00	0	0	0
PETER C VOGEL PO BOX 7696 MADISON, WI 53707	VICE PRESIDENT 5 00	0	0	0
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	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
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	505,284
b	Average of monthly cash balances.	1b	18,303
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	523,587
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	523,587
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	7,854
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	515,733
6	Minimum investment return. Enter 5% of line 5.	6	25,787

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	25,787
2a	Tax on investment income for 2016 from Part VI, line 5.	2a	400
b	Income tax for 2016 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	400
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	25,387
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	25,387
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	25,387

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	21,300
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	21,300
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	21,300

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				25,387
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.				
b From 2012.				
c From 2013.				
d From 2014.				
e From 2015.				
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ 21,300				
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.				21,300
e Remaining amount distributed out of corpus	0			
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	0			
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				4,087
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).	0			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	0			
10 Analysis of line 9				
a Excess from 2012.				
b Excess from 2013.				
c Excess from 2014.				
d Excess from 2015.				
e Excess from 2016.				

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 e-mail address of the person to whom applications should be addressed

DAVID L VOGEL
PO BOX 7696
MADISON, WI 53707
(608) 241-5454

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

THERE IS NO REQUIRED APPLICATION FORM. HOWEVER, ALL APPLICATIONS SHOULD INCLUDE A FULL DESCRIPTION OF THE PROJECT, A COPY OF THE APPLICANTS IRS DETERMINATION LETTER, A PROJECT BUDGET AND THE APPLICANTS CURRENT YEAR ORGANIZATION BUDGET, SHOWING IN EACH CASE ANTICIPATED SOURCES OF SUPPORT

c Any submission deadlines

NONE

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

GRANTS ARE MADE TO UNITS OF GOVERNMENT, PUBLIC SCHOOLS AND NON-PROFIT ORGANIZATIONS AND INSTITUTIONS WHICH ARE EXEMPT UNDER SECTION 501(C)(3) OF THE INTERNAL REVENUE CODE. THE GENERAL FOCUS OF THE FOUNDATION'S GRANTS ARE IN THE AREAS OF EDUCATION, HEALTH AND HUMAN SERVICES. GRANTS ARE NOT MADE TO INDIVIDUALS. ALL GRANTS FOR SCHOLARSHIPS OR RESEARCH ARE GIVEN EDUCATIONAL OR RESEARCH INSTITUTIONS WHICH HAVE FULL RESPONSIBILITY FOR SELECTING INDIVIDUAL RECIPIENTS. GRANTS ARE NOT USUALLY MADE TO SUPPORT OPERATING EXPENSES OF THE ORGANIZATION.

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	21,300
b <i>Approved for future payment</i>				
Total			3b	0

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2016)

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				
ARTHUR MORGAN SCHOOL 60 AMS CIRCLE BURNSVILLE, NC 28714	NONE	PUBLIC CHARI	GEN SUPPORT	300
THREE GAITS INC 3741 STATE ROAD 138W STOUGHTON, WI 53589	NONE	PUBLIC CHARI	GEN SUPPORT	300
GOODMAN-ATWOOD COMMUNITY CENTER 149 WAUBESA ST MADISON, WI 53704	NONE	PUBLIC CHAR	GEN SUPPORT	500
HABITAT FOR HUMANITY OF DANE COUNTY UNIT 29 MADISON, WI 53713	NONE	PUBLIC CHAR	GEN SUPPORT	200
HABITAT FOR HUMANITY OF LAKELAND IN PO BOX 925 LAKELAND, FL 33802	NONE	PUBLIC CHAR	GEN SUPPORT	200
HENRY VILAS ZOOLOGICAL SOCIETY 606 RANDALL AVE MADISON, WI 53715	NONE	PUBLIC CHAR	GEN SUPPORT	400
MADISON URBAN MINISTRY 2115 S PARK ST MADISON, WI 53713	NONE	PUBLIC CHAR	GEN SUPPORT	600
MITCHELL COUNTY ANIMAL RESCUE INC PO BOX 308 SPRUCE PINE, NC 28777	NONE	PUBLIC CHAR	GEN SUPPORT	100
NATURAL HERITAGE LAND TRUST 303 S PATERSON SUITE 6 MADISON, WI 53703	NONE	PUBLIC CHAR	GEN SUPPORT	500
OAKWOOD FOUNDATION INC 6201 MINERAL POINT RD MADISON, WI 53715	NONE	PUBLIC CHAR	GEN SUPPORT	1,000
SAMARITAN COUNSELING CENTER OF SO W 5900 MONONA DR SUITE 100 MADISON, WI 53716	NONE	PUBLIC CHAR	GEN SUPPORT	200
SCHOOL UPPLIES FOR KIDS PO BOX 7696 MADISON, WI 53707	NONE	PUBLIC CHAR	GEN SUPPORT	10,000
SOCIETY OF ST VINCENT DE PAUL 1109 JONATHON DR MADISON, WI 53713	NONE	PUBLIC CHAR	GEN SUPPORT	400
SPRUCE PINE MONTESSORI SCHOOL 67 WALNUT AVE SPRUCE PINE, NC 28777	NONE	PUBLIC CHAR	GEN SUPPORT	100
OPERATION FRESH START 1925 WINNEBAGO ST MADISON, WI 53704	NONE	PUBLIC CHAR	GEN SUPPORT	400
Total ► 3a				21,300

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				
ST JOHNS LUTHERN CHURCH BUILDING FD 322 E WASHINGTON AVE MADISON, WI 53703	NONE	PUBLIC CHAR	GEN SUPPORT	400
THE SALVATION ARMY PO BOX 8867 MADISON, WI 53708	NONE	PUBLIC CHAR	GEN SUPPORT	1,000
THE SALVATION ARMY PO BOX 928 LAKELAND, FL 33802	NONE	PUBLIC CHAR	GEN SUPPORT	1,000
TRIANGLE COMMUNITY MINISTRY INC 755 BRAXTON PL 8109 MADISON, WI 53715	NONE	PUBLIC CHAR	GEN SUPPORT	200
UNIV OF FLORIDA FOUNDATION PO BOX 116580 GAINESVILLE, FL 32611	NONE	PUBLIC CHAR	GEN SUPPORT	500
UNIV OF WI FOUNDATION PO BOX 8860 MADISON, WI 53708	NONE	PUBLIC CHAR	GEN SUPPORT	1,500
VSA VERY SPECIAL ARTS 1709 ABERG AVE SUITE1 MADISON, WI 53704	NONE	PUBLIC CHAR	GEN SUPPORT	300
WI COUNCIL OF THE BLIND 754 WILLIAMSON ST MADISON, WI 53703	NONE	PUBLIC CHAR	GEN SUPPORT	200
WI PUBLIC RADIO 821 UNIVERSITY AVE MADISON, WI 53706	NONE	PUBLIC CHAR	GEN SUPPORT	200
WI PUBLIC TELEVISION 821 UNIVERSITY AVE MADISON, WI 53706	NONE	PUBLIC CHAR	GEN SUPPORT	400
YMCA 101 E MIFFLIN ST MADISON, WI 53703	NONE	PUBLIC CHAR	GEN SUPPORT	400
Total ►				21,300
3a				

TY 2016 Accounting Fees Schedule**Name:** VOGEL FOUNDATION INC**EIN:** 39-1639595

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREPARATION	1,395	1,395	0	0

TY 2016 Investments - Other Schedule

Name: VOGEL FOUNDATION INC

EIN: 39-1639595

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
3314.382DFA TWO YEAR GLOBAL FIXED INC	AT COST	33,078	32,945
410SH SPDR DJ WS REIT	AT COST	24,563	38,274
216SH VANGUARD SMALL VAL CAP ETF	AT COST	12,565	26,136
568SH VANGAURD VALUE EFT MSCI	AT COST	27,696	52,830
183SH VANGUARD INTNTL EQUITY INDEX	AT COST	5,309	8,085
632SH VANGUARD MSCI	AT COST	26,926	22,613
361.496SHVANGUARD SHORT TERM BOND INDEX	AT COST	38,550	37,678
403SH VANGUARD SMALL CAP EFT	AT COST	26,040	51,971
146SH ISHRS BARCLAYS SHORT TREAS BD	AT COST	16,091	16,104
795SH ISHRSMSCI ACWI EX US INDEX FD	AT COST	32,086	32,015
470SH ISHARES S&P 500 INDEX FD	AT COST	53,656	105,745
166SH ISHRS BARCLAYS 1-3 YR TRS BD	AT COST	14,007	14,019
509SH ISHRS BARCLAYS 1-3YR CREDIT BD	AT COST	53,624	53,415
91SH ISHARES TIPS BOND FD	AT COST	10,321	10,298
127SH ISHARES MSCI EMERG MKTS	AT COST	5,087	5,391

TY 2016 Other Expenses Schedule**Name:** VOGEL FOUNDATION INC**EIN:** 39-1639595**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FILING FEE	89	0	0	0

TY 2016 Other Liabilities Schedule**Name:** VOGEL FOUNDATION INC**EIN:** 39-1639595

Description	Beginning of Year - Book Value	End of Year - Book Value
DANE COUNTY SCHOOL SUPPLIES FOR KIDS TRUST ACCOUNT	0	2,769

TY 2016 Other Professional Fees Schedule**Name:** VOGEL FOUNDATION INC**EIN:** 39-1639595

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BROKER FEES	3,918	3,918	0	0

TY 2016 Taxes Schedule**Name:** VOGEL FOUNDATION INC**EIN:** 39-1639595

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAX PAID	191	191	0	0
EXCISE TAX	94	94	0	0