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Form **990-PF**Department of the Treasury
Internal Revenue Service**Return of Private Foundation**

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

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Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf

OMB No 1545-0052

2016

Open to Public Inspection

For calendar year 2016 or tax year beginning , 2016, and ending , 20

Name of foundation

HARRY PORTMAN CHARITABLE TRUST 100155

Number and street (or P O box number if mail is not delivered to street address)

UMB BANK N.A. P. O. BOX 415044 M/S 1020307

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

KANSAS CITY, MO 64141-6692

A Employer identification number

43-6406877

B Telephone number (see instructions)

816-860-7712

C If exemption application is pending, check here ☐D 1. Foreign organizations, check here ☐2. Foreign organizations meeting the 85% test, check here and attach computation ☐E If private foundation status was terminated under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

G Check all that apply:

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

H Check type of organization:

☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$

3,534,399.

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)
1 Contributions, gifts, grants, etc., received (attach schedule)				
2 Check ☒ if the foundation is not required to attach Sch. B.				
3 Interest on savings and temporary cash investments				
4 Dividends and interest from securities	91,592.	90,837.		STMT 1
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	145,086.			
b Gross sales price for all assets on line 6a	664,879.			
7 Capital gain net income (from Part IV, line 2)		145,086.		
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)	778.			
12 Total. Add lines 1 through 11	237,456.	235,923.		
13 Compensation of officers, directors, trustees, etc.	47,374.	23,687.		23,687.
14 Other employee salaries and wages		NONE	NONE	
15 Pension plans, employee benefits		NONE	NONE	
16a Legal fees (attach schedule)				
b Accounting fees (attach schedule)	800.	NONE	NONE	800.
c Other professional fees (attach schedule)				
17 Interest				
18 Taxes (attach schedule) (see instructions)	911.	553.		
19 Depreciation (attach schedule) and depletion				
20 Occupancy				
21 Travel, conferences, and meetings		NONE	NONE	
22 Printing and publications		NONE	NONE	
23 Other expenses (attach schedule)	10.	10.		
24 Total operating and administrative expenses. Add lines 13 through 23	49,095.	24,250.	NONE	24,487.
25 Contributions, gifts, grants paid	175,000.			175,000.
26 Total expenses and disbursements. Add lines 24 and 25	224,095.	24,250.	NONE	199,487.
27 Subtract line 26 from line 12:				
a Excess of revenue over expenses and disbursements	13,361.			
b Net investment income (if negative, enter -0-)		211,673.		
c Adjusted net income (if negative, enter -0-)				

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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				
	2	Savings and temporary cash investments				
	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 ▶	NONE			
	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)				
	Liabilities	11	Investments - land, buildings, and equipment basis ▶			
		Less: accumulated depreciation ▶ (attach schedule)				
12		Investments - mortgage loans				
13		Investments - other (attach schedule)	2,032,531.	2,048,166.	3,534,399.	
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)	2,032,531.	2,048,166.	3,534,399.	
17		Accounts payable and accrued expenses				
18		Grants payable				
Net Assets or Fund Balances	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable (attach schedule)				
	22	Other liabilities (describe ▶)				
	23	Total liabilities (add lines 17 through 22)		NONE		
		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	2,032,531.	2,048,166.			
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)	2,032,531.	2,048,166.			
31	Total liabilities and net assets/fund balances (see instructions)	2,032,531.	2,048,166.			

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	2,032,531.
2	Enter amount from Part I, line 27a	2	13,361.
3	Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 5	3	2,337.
4	Add lines 1, 2, and 3	4	2,048,229.
5	Decreases not included in line 2 (itemize) ▶ ACCRUED INTEREST PAID	5	63.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	2,048,166.

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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					
b					
c					
d					
e					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)		
a 664,879.		519,793.	145,086.		
b					
c					
d					
e					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69					
(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	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))		
a			145,086.		
b					
c					
d					
e					
2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }			2	145,086.	
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 the instructions before making any entries.

(a) Base period years Calendar year (for 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	194,386.	3,431,535.	0.056647
2014	190,635.	3,601,303.	0.052935
2013	188,988.	3,411,252.	0.055401
2012	176,196.	3,223,305.	0.054663
2011	176,221.	3,184,440.	0.055338
2 Total of line 1, column (d)			2 0.274984
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 0.054997
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5			4 3,388,011.
5 Multiply line 4 by line 3.			5 186,330.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 2,117.
7 Add lines 5 and 6.			7 188,447.
8 Enter qualifying distributions from Part XII, line 4. 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.			8 199,487.

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	2,117.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	
3	Add lines 1 and 2	3	2,117.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	NONE
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	2,117.
6	Credits/Payments:		
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a	716.
b	Exempt foreign organizations - tax withheld at source	6b	NONE
c	Tax paid with application for extension of time to file (Form 8868)	6c	NONE
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	716.
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	1,401.
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 ☒ NONE 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?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)? 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.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year. (1) On the foundation ☐ \$ _____ (2) On foundation managers ☐ \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ MO		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ N/A	X	
14 The books are in care of ▶ UMB BANK, N.A. Telephone no. ▶ (816) 860-7711 Located at ▶ 1010 GRAND AVENUE, KANSAS CITY, MO ZIP+4 ▶ 64106		
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? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ▶		X

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

	Yes	No
1a During the year did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☒ Yes ☐ No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here ▶	1b	X
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2016?	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)): a At the end of tax year 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016? ☐ Yes ☒ No If "Yes," list the years ▶ 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.) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ▶	2b	
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? 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?	4a	X
	4b	X

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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)? ☐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	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
UMB BANK, N.A.	TRUSTEE			
P.O. BOX 419692, KANSAS CITY, MO 64141-6692	1	37,899.	-0-	-0-
MICHAEL A. SCHULTZ	CO-TRUSTEE			
400 W 49TH TER #2146, KANSAS CITY, MO 64112	1	9,475.	-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	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE		NONE	NONE	NONE

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

NONE

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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		NONE

Total number of others receiving over \$50,000 for professional services **NONE****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 NONE	
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 NONE	
2	
All other program-related investments. See instructions.	
3 NONE	
Total. Add lines 1 through 3	

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes.		
a	Average monthly fair market value of securities	1a	3,327,433.
b	Average of monthly cash balances	1b	112,172.
c	Fair market value of all other assets (see instructions).	1c	NONE
d	Total (add lines 1a, b, and c)	1d	3,439,605.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	NONE
3	Subtract line 2 from line 1d	3	3,439,605.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	51,594.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	3,388,011.
6	Minimum investment return. Enter 5% of line 5	6	169,401.

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	169,401.
2a	Tax on investment income for 2016 from Part VI, line 5	2a	2,117.
b	Income tax for 2016. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	2,117.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	167,284.
4	Recoveries of amounts treated as qualifying distributions	4	NONE
5	Add lines 3 and 4	5	167,284.
6	Deduction from distributable amount (see instructions).	6	NONE
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	167,284.

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	199,487.
b	Program-related investments - total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	NONE
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	NONE
b	Cash distribution test (attach the required schedule)	3b	NONE
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	199,487.
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	2,117.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	197,370.

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				167,284.
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only.			17,720.	
b Total for prior years 20 <u>14</u> , 20 <u> </u> , 20 <u> </u>		NONE		
3 Excess distributions carryover, if any, to 2016:				
a From 2011	NONE			
b From 2012	NONE			
c From 2013	NONE			
d From 2014	NONE			
e From 2015	NONE			
f Total of lines 3a through e	NONE			
4 Qualifying distributions for 2016 from Part XII, line 4 ► \$ <u>199,487.</u>				
a Applied to 2015, but not more than line 2a . . .			17,720.	
b Applied to undistributed income of prior years (Election required - see instructions)		NONE		
c Treated as distributions out of corpus (Election required - see instructions)	NONE			
d Applied to 2016 distributable amount.				167,284.
e Remaining amount distributed out of corpus. . .	14,483.			
5 Excess distributions carryover applied to 2016 . (If an amount appears in column (d), the same amount must be shown in column (a))	NONE			NONE
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	14,483.			
b Prior years' undistributed income. Subtract line 4b from line 2b.		NONE		
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		NONE		
d Subtract line 6c from line 6b. Taxable amount - see instructions		NONE		
e Undistributed income for 2015. Subtract line 4a from line 2a. Taxable amount - see instructions				
f Undistributed income for 2016. Subtract lines 4d and 5 from line 1 This amount must be distributed in 2017.				NONE
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)	NONE			
8 Excess distributions carryover from 2011 not applied on line 5 or line 7 (see instructions) . . .	NONE			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	14,483.			
10 Analysis of line 9:				
a Excess from 2012	NONE			
b Excess from 2013	NONE			
c Excess from 2014	NONE			
d Excess from 2015	NONE			
e Excess from 2016	14,483.			

Part XIV

NOT APPLICABLE

4942(i)(3) or	4942(i)(5)
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Tax year	Prior 3 years				(e) Total
(a) 2016	(b) 2015	(c) 2014	(d) 2013		

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Part XV

any time during the year - see instructions.)

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).)

N/A

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.

N/A

2 Inform

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:

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 Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i> SEE STATEMENT 10				175,000.
Total			▶ 3a	175,000.
b <i>Approved for future payment</i>				
Total			▶ 3b	

Enter gross amounts unless otherwise indicated.

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

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

NOT APPLICABLE



Account Name:

Harry Portman Charitable Trust

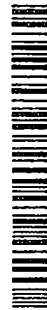
Account Number: 100155

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Statement Period: Jan. 1 - Dec. 31, 2016

Statement of Investment Position

Units Description	Symbol Cusip	Cost Basis		Market Value		Unrealized Gain / (Loss)	Estimated Annual Yield Income %
		Unit	Total	Unit	Total		
Equity Securities							
Common Stock							
1,000 Abbott Laboratories	ABT 002824100	22.91	22,905.79	38.41	38,410.00	15,504.21	1,060 2.76
1,000 Abbvie Inc	ABBV 00287Y109	24.84	24,839.37	62.62	62,620.00	37,780.63	2,560 4.09
360 Air Products and Chemicals Inc	APD 009158106	26.09	9,391.03	143.82	51,775.20	42,384.17	1,238 2.39
1,270 Alliant Energy Corp	LNT 018802108	16.73	21,249.99	37.89	48,120.30	26,870.31	1,492 3.10
2,000 American Electric Power Inc	AEP 025537101	36.09	72,178.80	62.96	125,920.00	53,741.20	4,720 3.75
1,140 Applied Materials Inc	AMAT 038222105	4.55	5,183.44	32.27	36,787.80	31,604.36	456 1.24
2,080 AT & T Inc	T 00206R102	10.78	22,415.36	42.53	88,462.40	66,047.04	4,077 4.61
815 Chevron Corp	CVX 166764100	68.25	55,623.71	117.70	95,925.50	40,301.79	3,521 3.67
20 Chipotle Mexican Grill Inc Class A Shares	CMG 169656105	567.90	11,357.91	377.32	7,546.40	(3,811.51)	0
400 Cintas Corp	CTAS 172908105	59.04	23,615.44	115.56	46,224.00	22,608.56	532 1.15
600 Colgate Palmolive Co	CL 194162103	42.28	25,369.98	65.44	39,264.00	13,894.02	936 2.38
1,291 ConocoPhillips	COP 20825C104	22.37	28,873.97	50.14	64,730.74	35,856.77	1,291 1.99
900 Du Pont E I De Nemours & Co	DD 263534109	50.55	45,497.67	73.40	66,060.00	20,562.33	1,368 2.07
1,335 Duke Energy Hldg Corp	DUK 26441C204	55.16	73,635.83	77.62	103,622.70	29,986.87	4,566 4.41
500 Eaton Corp Plc Sedol B8KQN82	ETN G29183103	51.95	25,972.50	67.09	33,545.00	7,572.50	1,140 3.40
760 Emerson Electric Co	EMR 291011104	32.42	24,637.87	55.75	42,370.00	17,732.13	1,459 3.44
913 Encana Corp (USD)	ECA 292505104	0.00	0.00	11.74	10,718.62	10,718.62	0
680 ExxonMobil Corp	XOM 30231G102	13.30	9,041.93	90.26	61,376.80	52,334.87	2,040 3.32
1,000 Highwoods Properties Inc	HIW 431284108	41.38	41,384.80	51.01	51,010.00	9,625.20	1,700 3.33



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Statement of Investment Position (continued)

Units Description	Symbol Cusip	Cost Basis		Market Value		Unrealized Gain / (Loss)	Estimated Annual Yield Income %
		Unit	Total	Unit	Total		
Equity Securities (continued)							
Common Stock (continued)							
700 Illinois Tool Works Inc	ITW 452308109	47.90	33,533.40	122.46	85,722.00	52,188.60	1,820 2.12
2,000 Intel Corp	INTC 458140100	21.07	42,144.10	36.27	72,540.00	30,395.90	2,080 2.87
1,073 Johnson & Johnson	JNJ 478160104	9.89	10,616.35	115.21	123,620.33	113,003.98	3,434 2.78
501 Johnson Controls International Plc	TYC G51502105	48.11	24,103.11	41.19	20,636.19	(3,466.92)	430 2.09
900 JPMorgan Chase & Co	JPM 46625H100	58.47	52,624.98	86.29	77,661.00	25,036.02	1,728 2.23
300 Kraft Heinz Co	KHC 500754106	78.04	23,412.00	87.32	26,196.00	2,784.00	720 2.75
640 Marathon Oil Corp	MRO 565849106	8.76	5,603.89	17.31	11,078.40	5,474.51	128 1.16
640 Marathon Petroleum Corp	MPC 56585A102	5.92	3,790.73	50.35	32,224.00	28,433.27	922 2.86
240 Marriott Intl Inc New	MAR 571903202	68.77	16,504.20	82.68	19,843.20	3,339.00	288 1.45
500 McDonalds Corp	MCD 580135101	77.68	38,841.43	121.72	60,860.00	22,018.57	1,880 3.09
950 Merck & Co Inc	MRK 58933Y105	14.36	13,640.65	58.87	55,926.50	42,285.85	1,786 3.19
1,200 NextEra Energy Inc	NEE 65339F101	18.43	22,110.00	119.46	143,352.00	121,242.00	4,176 2.91
270 Norfolk Southern Corp	NSC 655844108	94.55	25,528.47	108.07	29,178.90	3,650.43	637 2.18
1,336 Novartis AG - ADR One ADR repstg 1 Ord Share	NVS 66987V109	14.42	19,268.79	72.84	97,314.24	78,045.45	3,077 3.16
640 Occidental Petroleum Corp	OXY 674599105	13.76	8,808.43	71.23	45,587.20	36,778.77	1,946 4.27
1,660 Oracle Corp	ORCL 68389X105	16.56	27,495.35	38.45	63,827.00	36,331.65	996 1.56
675 Pepsico Inc	PEP 713448108	32.20	21,733.92	104.63	70,625.25	48,891.33	2,032 2.88
4,000 Pfizer Inc	PFE 717081103	17.27	69,076.40	32.48	129,920.00	60,843.60	5,120 3.94
645 Phillips 66	PSX 718546104	13.29	8,573.19	86.41	55,734.45	47,161.26	1,625 2.92



Account Name:

Harry Portman Charitable Trust

Account Number: 100155

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Statement Period: Jan. 1 - Dec. 31, 2016

Statement of Investment Position (continued)

Units Description	Symbol Cusip	Cost Basis		Market Value		Unrealized Gain / (Loss)	Estimated Annual Yield Income %
		Unit	Total	Unit	Total		
Equity Securities (continued)							
Common Stock (continued)							
500 Raytheon Co	RTN 755111507	46.35	23,175.00	142.00	71,000.00	47,825.00	1,465 2.06
1,105 Schlumberger Ltd	SLB 806857108	12.34	13,638.97	83.95	92,764.75	79,125.78	2,210 2.38
445 Spectra Energy Corp	SE 847560109	15.83	7,045.68	41.09	18,285.05	11,239.37	721 3.94
500 Toronto Dominion Bank	TD 891160509	45.41	22,703.55	49.34	24,670.00	1,966.45	820 3.32
340 Union Pacific Corp	UNP 907818108	95.30	32,402.00	103.68	35,251.20	2,849.20	823 2.33
850 United Parcel Service Inc	UPS 911312106	104.28	88,634.51	114.64	97,444.00	8,809.49	2,652 2.72
Class B Shares	USB	41.64	20,819.95	51.37	25,685.00	4,865.05	560 2.18
500 US Bancorp Del	902973304						
	VFC	20.19	30,284.55	53.35	80,025.00	49,740.45	2,520 3.15
1,500 V F Corp	918204108						
	XLNX	54.53	32,716.98	60.37	36,222.00	3,505.02	792 2.19
600 Xilinx Inc	983919101						
Total Common Stock		1,282,005.97		2,777,683.12		1,495,677.15	81,543
		1,282,005.97		2,777,683.12		1,495,677.15	81,543

Fixed Income Securities

Government & Agency Bonds							
1,594.97 Govt National Mtg Assn		1.02	1,628.86	103.17	1,645.56	16.70	80 4.85
DTD 12/1/2002 5.0000% 12/20/2017	36202DVE8						
Pool # 003313							
Total Government & Agency Bonds			1,628.86		1,645.56	16.70	80
Corporate Bonds							
50,000 Apple Inc DTD 2/23/2016 2.250%		1.02	51,145.81	99.92	49,958.50	(1,187.31)	1,125 1.76
2/23/2021							
Sr Unsecured	037833BS8						
Call 01/23/2021 @ 100							
Aa1							



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Account Name:

Harry Portman Charitable Trust

Account Number: 100155

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Statement Period: Jan. 1 - Dec. 31, 2016

Statement of Investment Position (continued)

Units Description	Symbol Cusip	Cost Basis		Market Value		Unrealized Gain / (Loss)	Estimated Annual Yield Income %
		Unit	Total	Unit	Total		
Fixed Income Securities (continued)							
Corporate Bonds (continued)							
50,000 BB&T Corporation DTD 12/8/2014 2.450% Ser MTN 1/15/2020 Call 12/15/2019 @ 100 Sr Unsecured A2	05531FAS2	1.00	50,106.37	100.78	50,392.00	285.63	1,225 2.40
50,000 Cisco Systems Inc DTD 11/17/2009 4.450% 1/15/2020 Sr Notes A1	17275RAH5	1.09	54,513.74	107.17	53,587.00	(926.74)	2,225 2.06
50,000 Goldman Sachs Group Inc MTN DTD 2/5/2009 7.500% 2/15/2019 Senior Notes A3	38141EA25	1.12	56,247.11	110.86	55,429.00	(818.11)	3,750 3.73
50,000 Halliburton Co DTD 9/12/2008 5.900% 9/15/2018 Sr Unsecured Notes Baa1	406216AV3	1.08	53,877.90	106.43	53,213.50	(664.40)	2,950 3.90
50,000 Home Depot Inc DTD 2/12/2016 2.000% 4/1/2021 Sr Unsecured Call 03/01/2021 @ 100 A2	437076BL5	1.02	50,818.37	99.21	49,602.50	(1,215.87)	1,000 1.66
50,000 JPMorgan Chase & Co DTD 8/20/2012 2.000% 8/15/2017 Sr Unsecured Notes A3	48126EAA5	1.00	50,237.68	100.37	50,185.50	(52.18)	1,000 1.84
25,000 Lowes Companies Inc DTD 11/22/2010 3.750% 4/15/2021 Sr Unsecured Notes Call 1/15/21 @ 100 A3	548661CT2	1.09	27,143.50	105.74	26,434.75	(708.75)	938 1.74
50,000 Pepsico Inc DTD 10/26/2010 3.125% 11/1/2020 Sr Unsecured Notes A1	713448BR8	1.06	53,104.95	103.21	51,603.50	(1,501.45)	1,563 1.70



Account Name: Harry Portman Charitable Trust

Account Number: 100155

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Statement Period: Jan. 1 - Dec. 31, 2016

Statement of Investment Position (continued)

Statement of Investment Position (continued)

Units Description	Symbol Cusip	Cost Basis		Market Value		Unrealized Gain / (Loss)	Estimated Annual Yield Income %
		Unit	Total	Unit	Total		
Fixed Income Securities (continued)							
Corporate Bonds (continued)							
50,000 United Parcel Service Inc DTD 1/15/2008 5.500% 1/15/2018 Sr Unsecured Notes A1	911312AH9	1.06	53,088.29	104.22	52,110.00	(978.29)	2,750 3.64
25,000 UnitedHealth Group Inc DTD 12/15/2007 6.000% 6/15/2017 Sr Unsecured Notes A3	91324PAW2	1.09	27,208.84	102.06	25,514.75	(1,694.09)	1,500 4.07
Total Corporate Bonds			527,492.56		518,031.00	(9,461.56)	20,025
Total Fixed Income Securities			529,121.42		519,676.56	(9,444.86)	20,105

Money Markets & Cash

Money Market Funds							
236,684.56 Fidelity Treasury Only Fund #680	233809300	1.00	236,684.56	1.00	236,684.56		767 0.32
Total Money Market Funds			236,684.56		236,684.56	0.00	767
Cash							
354.47 Cash		1.00	354.47	1.00	354.47		0
Total Cash			354.47		354.47	0.00	0
Total Money Markets and Cash			237,039.03		237,039.03	0.00	767
Account Total			2,048,166.42		3,534,398.71	1,486,232.29	102,415



000192 368/2573

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
DIVIDENDS AND INTEREST FROM SECURITIES	91,592.	90,837.
TOTAL	91,592.	90,837.

FORM 990PF, PART I - ACCOUNTING FEES
=====

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
TAX PREPARATION FEE (NON-ALLOC	800.			800.
TOTALS	800.	NONE	NONE	800.

FORM 990PF, PART I - TAXES

=====

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
FOREIGN TAXES	553.	553.
FEDERAL ESTIMATES - INCOME	358.	
TOTALS	911.	553.
	=====	=====

FORM 990PF, PART I - OTHER EXPENSES
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----
OTHER NON-ALLOCABLE EXPENSE -	10.	10.
TOTALS	10. =====	10. =====

FORM 990PF, PART III - OTHER INCREASES IN NET WORTH OR FUND BALANCES

DESCRIPTION

AMOUNT

ROUNDING

3.

ADIENT LTD BASIS ADJUSTMENT FOR SHARES

2,334.

TOTAL

2,337.

HARRY PORTMAN CHARITABLE TRUST 100155

43-6406877

FORM 990PF, PART XV, LINE 3a - CONTRIBUTIONS, GIFTS, GRANTS PAID

RECIPIENT NAME:

MISSOURI COLLEGES FUND

ADDRESS:

3702 W. TRUMAN BOULEVARD

JEFFERSON CITY, MO 65102

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

SUPPORT OF CHARITABLE ACTIVITIES

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 2,500.

RECIPIENT NAME:

JEWISH FAMILY SERVICES

ADDRESS:

5801 W. 115TH STREET #101

OVERLAND PLARK, KS 66211

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

SUPPORT OF CHARITABLE ACTIVITIES

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 15,000.

RECIPIENT NAME:

HARRY S TRUMAN LIBRARY INSTITUTE

ADDRESS:

500 W. U.S. HIGHWAY 24

INDEPENDENCE, MO 64050

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

SUPPORT OF CHARITABLE ACTIVITIES

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 17,500.

HARRY PORTMAN CHARITABLE TRUST 100155

43-6406877

FORM 990PF, PART XV, LINE 3a - CONTRIBUTIONS, GIFTS, GRANTS PAID

=====

RECIPIENT NAME:

KANSAS CITY SYMPHONY

ADDRESS:

1020 CENTRAL

KANSAS CITY, MO 64105

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

SUPPORT OF CHARITABLE ACTIVITIES

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 30,000.

RECIPIENT NAME:

AMERICAN RED CROSS

KANSAS CITY CHAPTER

ADDRESS:

211 WEST ARMOUR BOULEVARD

KANSAS CITY, MO 64111

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

SUPPORT OF CHARITABLE ACTIVITIES

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 5,000.

RECIPIENT NAME:

CHILDREN'S MERCY HOSPITAL

ADDRESS:

2401 GILHAM ROAD

KANSAS CITY, MO 64108

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

SUPPORT OF CHARITABLE ACTIVITIES

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 10,000.

HARRY PORTMAN CHARITABLE TRUST 100155

43-6406877

FORM 990PF, PART XV, LINE 3a - CONTRIBUTIONS, GIFTS, GRANTS PAID

=====

RECIPIENT NAME:

KEMPER MUSEUM OF CONTEMPORARY ART

ADDRESS:

4420 WARWICK BOULEVARD

KANSAS CITY, MO 64111

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

SUPPORT OF CHARITABLE ACTIVITIES

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 30,000.

RECIPIENT NAME:

MOCSA

ADDRESS:

3100 BROADWAY STREET

KANSAS CITY, MO 64111

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

SUPPORT OF CHARITABLE ACTIVITIES

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 5,000.

RECIPIENT NAME:

UNIVERSITY ACADEMY

ADDRESS:

6801 HOLMES ROAD

KANSAS CITY, MO 64131

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

SUPPORT OF CHARITABLE ACTIVITIES

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 10,000.

HARRY PORTMAN CHARITABLE TRUST 100155

43-6406877

FORM 990PF, PART XV, LINE 3a - CONTRIBUTIONS, GIFTS, GRANTS PAID

=====

RECIPIENT NAME:

LINDA HALL LIBRARY

ADDRESS:

5109 CHERRY ST

KANSAS CITY, MO 64110

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

SUPPORT OF CHARITABLE ACTIVITIES

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:

VILLAGE SHALOM

ADDRESS:

5500 WEST 123RD STREET

OVERLAND PARK, KS 66209

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

SUPPORT OF CHARITABLE ACTIVITIES

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 10,000.

RECIPIENT NAME:

KAUFFMAN CENTER FOR THE PERFORMING ARTS

ADDRESS:

1601 BROADWAY BLVD

KANSAS CITY, MO 64108

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

SUPPORT OF CHARITABLE ACTIVITIES

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 5,000.

HARRY PORTMAN CHARITABLE TRUST 100155

43-6406877

FORM 990PF, PART XV, LINE 3a - CONTRIBUTIONS, GIFTS, GRANTS PAID

=====

RECIPIENT NAME:

ALBRECHT-KEMPER MUSEUM OF ART

ADDRESS:

2818 FREDERICK AVE ST

ST JOSEPH, MO 64506

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

SUPPORT OF CHARITABLE ACTIVITIES

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 25,000.

TOTAL GRANTS PAID:

175,000.

=====