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

Name of foundation THOMAS & SALLY WOOD FAMILY FOUNDATION C/O JAN LEONARD UMB BANK		A Employer identification number 43-6445255	
Number and street (or P O box number if mail is not delivered to street address) 1010 GRAND BLVD		Room/suite	
City or town, state or province, country, and ZIP or foreign postal code KANSAS CITY, MO 64106		B Telephone number (see instructions) (816) 860-7547	
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) \$ 5,795,035		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)	0			
	2 Check ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	22,744	22,744		
	4 Dividends and interest from securities	130,400	130,400		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	66,643			
	b Gross sales price for all assets on line 6a 273,414				
	7 Capital gain net income (from Part IV, line 2)		66,643		
	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)	24,254	24,254		
	12 Total. Add lines 1 through 11	244,041	244,041		
	13 Compensation of officers, directors, trustees, etc	8,000	4,000		4,000
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	6,115	3,058		3,057
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	6,128	705		0
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	28,963	28,963		0
	24 Total operating and administrative expenses. Add lines 13 through 23	49,206	36,726		7,057
	25 Contributions, gifts, grants paid	198,500			198,500
	26 Total expenses and disbursements. Add lines 24 and 25	247,706	36,726		205,557
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-3,665			
	b Net investment income (if negative, enter -0-)		207,315		
	c Adjusted net income (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions.)		
		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing			
	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 ▶ _____			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments—U S and state government obligations (attach schedule)	199,543	109,235	108,512
	b Investments—corporate stock (attach schedule)	3,185,993	3,269,561	4,281,323
	c Investments—corporate bonds (attach schedule)	1,225,449	1,228,287	1,215,663
	11 Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	225,121	225,358	189,537
	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)	4,836,106	4,832,441	5,795,035	
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 ▶ _____)			
	23 Total liabilities (add lines 17 through 22)	0	0	
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	270,208	270,208	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund	0	0	
	29 Retained earnings, accumulated income, endowment, or other funds	4,565,898	4,562,233	
	30 Total net assets or fund balances (see instructions)	4,836,106	4,832,441	
31 Total liabilities and net assets/fund balances (see instructions) .	4,836,106	4,832,441		

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	4,836,106
2 Enter amount from Part I, line 27a	2	-3,665
3 Other increases not included in line 2 (itemize) ▶ _____	3	0
4 Add lines 1, 2, and 3	4	4,832,441
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	4,832,441

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)
1a See Additional Data Table			
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 See Additional Data Table			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a See Additional Data Table			
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	66,643
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	266,600	5,581,229	0 047767
2014	293,100	5,769,360	0 050803
2013	266,735	4,597,546	0 058017
2012	167,691	3,274,177	0 051216
2011	92,818	1,584,078	0 058594

2 Total of line 1, column (d)	2	0 266397
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 053279
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	5,524,990
5 Multiply line 4 by line 3	5	294,366
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	2,073
7 Add lines 5 and 6	7	296,439
8 Enter qualifying distributions from Part XII, line 4	8	205,557

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	4,146
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	4,146
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	4,146
6	Credits/Payments		
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a	4,360
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	4,360
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	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid . . . ▶	10	214
11	Enter the amount of line 10 to be Credited to 2017 estimated tax ▶ 214 Refunded ▶	11	0

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)? 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	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? If "Yes," attach a detailed description of the activities	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? If "Yes," attach a conformed copy of the changes	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? If "Yes," attach the statement required by General Instruction T	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? If "Yes," complete Part II, col (c), and Part XV	7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ KS		
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 .	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)? If "Yes," complete Part XIV	9	No
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	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 ► THOMAS J WOOD III Telephone no ► (913) 362-2010			

Located at **►** 2701 WEST 69TH STREET MISSION HILLS KS ZIP+4 **►** 66208

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 instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes," enter the name of the foreign country ►	16	Yes	No

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

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

1a	During the year did the foundation (either directly or indirectly)		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			
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)? ☐	5b		
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 <i>If "Yes," attach the statement required by Regulations section 53.4945–5(d)</i>			
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 <i>If "Yes" to 6b, file Form 8870</i>	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
THOMAS J WOOD III 2701 W 69TH STREET SHAWNEE MISSION, KS 66208	TRUSTEE 0 25	2,000	0	0
SUSAN WOOD ATHENS 3717 S XANTHUS TULSA, OK 74105	TRUSTEE 0 25	2,000	0	0
SHARON WOOD ORR 6120 MISSION DRIVE SHAWNEE MISSION, KS 66208	TRUSTEE 0 25	2,000	0	0
SALLY WOOD SHAFFER 5200 SUNSET DRIVE KANSAS CITY, MO 64112	TRUSTEE 0 25	2,000	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 NONE	0
2 NONE	0
All other program-related investments. See instructions.	
3 	0
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	5,443,536
b	Average of monthly cash balances.	1b	165,591
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	5,609,127
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	5,609,127
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	84,137
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	5,524,990
6	Minimum investment return. Enter 5% of line 5.	6	276,250

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	276,250
2a	Tax on investment income for 2016 from Part VI, line 5.	2a	4,146
b	Income tax for 2016 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	4,146
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	272,104
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	272,104
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	272,104

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	205,557
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	205,557
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	205,557

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				272,104
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.				15,298
b From 2012.				8,400
c From 2013.				39,588
d From 2014.				6,622
e From 2015.				
f Total of lines 3a through e.	69,908			
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ 205,557				
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.				205,557
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))	66,547			66,547
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	3,361			
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).	0			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	3,361			
10 Analysis of line 9				
a Excess from 2012.				
b Excess from 2013.				
c Excess from 2014.				3,361
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 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 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 Additional Data Table				
Total			▶ 3a	198,500
b <i>Approved for future payment</i>				
Total			▶ 3b	0

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			14	22,744	
4 Dividends and interest from securities.			14	130,400	
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.			14	24,254	
8 Gain or (loss) from sales of assets other than inventory			18	66,643	
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		244,041	0
13 Total. Add line 12, columns (b), (d), and (e).			13		244,041

(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]

- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

- b** If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

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

Print/Type preparer's name ED BARTAK	Preparer's Signature	Date	Check if self-employed ▶ ☐	PTIN P00170935
Firm's name ▶ RSM US LLP				Firm's EIN ▶ 42-0714325
Firm's address ▶ 4801 MAIN STREET SUITE 400 KANSAS CITY, MO 64112				Phone no (816) 753-3000

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

List and describe the kind(s) of property sold (e g , real estate, (a) 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)
VERSUM MATERIALS INC	P	2011-09-16	2016-12-05
WELLS FARGO & CO	P	2015-11-10	2016-12-05
ROYAL DUTCH SHELL PLC	P	2011-10-03	2016-06-03
RIO TINTO FIN USA LTD 4/17/2009	P	2012-11-06	2016-10-12
HOME DEPOT INC	P	2011-09-16	2016-12-05
GENERAL ELECTRIC CAP CORP DTD 10/20/2006 5 375% 10/20/2016	P	2012-12-11	2016-10-20
CALIFORNIA RESOURCES CRP	P	2011-09-16	2016-04-07
CONOCOPHILLIPS DTD 2/3/2009 5 750% 2/1/2019	P	2015-03-17	2016-02-03
UNITED STATES TREASURY NOTES DTD 2/28/13 0 750% 2/28/201	P	2016-01-29	2016-09-27
VALE OVERSEAS LTD DTD 11/21/2006 6 250% 1/23/2017	P	2015-03-03	2016-01-21

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
4,334		2,232	2,102
76,498		47,968	28,530
3,688		5,042	-1,354
17,737		18,306	-569
49,928		11,757	38,171
25,000		26,003	-1,003
42		52	-10
41,860		44,463	-2,603
25,008		24,965	43
9,900		10,394	-494

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			2,102
			28,530
			-1,354
			-569
			38,171
			-1,003
			-10
			-2,603
			43
			-494

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
VALE OVERSEAS LTD DTD 11/21/2006 6 250% 1/23/2017	P	2015-03-03	2016-01-22
CAPITAL GAINS DIVIDENDS	P		

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
14,925		15,589	-664
4,494			4,494

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			-664
			4,494

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>				
AMERICAN RED CROSS 2025 E STREET NW WASHINGTON, DC 20006	NONE	PC	SCIENTIFIC, ARTISTIC,RELIGIOUS,OR LITERARY PURPOSES	5,000
GRACE AND HOLY TRINITY CHURCH 415 W 13TH STREET KANSAS CITY, MO 64105	NONE	PC	SCIENTIFIC, ARTISTIC,RELIGIOUS,OR LITERARY PURPOSES	2,500
HUMANE SOCIETY OF GREATER KANSAS CITY 5445 PARALLEL PARKWAY KANSAS CITY, KS 66104	NONE	PC	SCIENTIFIC, ARTISTIC, RELIGIOUS, OR LITERARY PURPOSES	10,000
KANSAS CITY BALLET 500 W PERSHING ROAD KANSAS CITY, MO 64108	NONE	PC	SCIENTIFIC, ARTISTIC,RELIGIOUS,OR LITERARY PURPOSES	15,000
KANSAS CITY PUBLIC LIBRARY 14 WEST 10TH STREET KANSAS CITY, MO 64105	NONE	PC	SCIENTIFIC, ARTISTIC,RELIGIOUS,OR LITERARY PURPOSES	5,000
KANSAS CITY SYMPHONY 1703 WYANDOTTE STREET STE 200 KANSAS CITY, MO 64108	NONE	PC	SCIENTIFIC, ARTISTIC, RELIGIOUS, OR LITERARY PURPOSES	10,000
KAUFFMAN CENTER FOR THE PERFORMING ARTS 1601 BROADWAY BLVD KANSAS CITY, MO 64108	NONE	PC	SCIENTIFIC, ARTISTIC, RELIGIOUS, OR LITERARY PURPOSES	15,000
KCPT 125 EAST 31ST STREET KANSAS CITY, MO 64108	NONE	PC	SCIENTIFIC, ARTISTIC,RELIGIOUS,OR LITERARY PURPOSES	10,000
KEMPER MUSEUM OF CONTEMPORARY ART 4420 WARWICK BLVD KANSAS CITY, MO 64111	NONE	PC	SCIENTIFIC, ARTISTIC,RELIGIOUS,OR LITERARY PURPOSES	20,000
KU ENDOWMENT PO BOX 928 LAWRENCE, KS 66044	NONE	PC	SCIENTIFIC, ARTISTIC, RELIGIOUS, OR LITERARY PURPOSES	15,000
LIBERTY MEMORIAL ASSOCIATION 100 W 26TH ST KANSAS CITY, MO 64108	NONE	PC	SCIENTIFIC, ARTISTIC, RELIGIOUS, OR LITERARY PURPOSES	5,000
MIND DRIVE KC 5735 CENTRAL STREET KANSAS CITY, MO 64113	NONE	PC	SCIENTIFIC, ARTISTIC,RELIGIOUS,OR LITERARY PURPOSES	2,500
NATURE CONSERVANCY - KANSAS CHAPTER 2420 NW BUTTON ROAD TOPEKA, KS 66618	NONE	PC	SCIENTIFIC, ARTISTIC,RELIGIOUS,OR LITERARY PURPOSES	10,000
NATURE CONSERVANCY - OKLAHOMA CHAPTER 2727 E 21ST STREET SUITE 102 TULSA, OK 74114	NONE	PC	SCIENTIFIC, ARTISTIC,RELIGIOUS,OR LITERARY PURPOSES	5,000
OPERATION BREAKTHROUGH 3039 TROOST KANSAS CITY, MO 64109	NONE	PC	SCIENTIFIC, ARTISTIC,RELIGIOUS,OR LITERARY PURPOSES	10,000
Total ► 3a				198,500

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				
POWELL GARDENS 1609 NW US HIGHWAY 50 KINGSVILLE, MO 64061	NONE	PC	SCIENTIFIC, ARTISTIC,RELIGIOUS,OR LITERARY PURPOSES	10,000
THE JEWEL BALL 4525 OAK STREET KANSAS CITY, MO 64111	NONE	PC	SCIENTIFIC, ARTISTIC, RELIGIOUS, OR LITERARY PURPOSES	10,000
UMKC CONSERVATORY OF MUSIC 4949 CHERRY STREET KANSAS CITY, MO 64110	NONE	SO II	SCIENTIFIC, ARTISTIC, RELIGIOUS, OR LITERARY PURPOSES	7,500
AMETHYST PLACE 2735A TROOST KANSAS CITY, MO 64109	NONE	PC	SCIENTIFIC, ARTISTIC, RELIGIOUS, OR LITERARY PURPOSES	2,500
LYRIC OPERA OF KANSAS CITY 1725 HOLMES KANSAS CITY, MO 64108	NONE	PC	SCIENTIFIC, ARTISTIC, RELIGIOUS, OR LITERARY PURPOSES	5,000
NEGRO LEAGUES BASEBALL MUSEUM INC 1616 EAST 18TH STREET KANSAS CITY, MO 64108	NONE	PC	SCIENTIFIC, ARTISTIC, RELIGIOUS, OR LITERARY PURPOSES	2,500
UW MEDICINE NORTHWEST 1550 NORTH 115TH STREET NO D-180 SEATTLE, WA 98133	NONE	PC	SCIENTIFIC, ARTISTIC, RELIGIOUS, OR LITERARY PURPOSES	12,500
WESTPORT GARDEN CLUB 9839 ASH DRIVE OVERLAND PARK, KS 66207	NONE	PC	SCIENTIFIC, ARTISTIC, RELIGIOUS, OR LITERARY PURPOSES	1,000
EISENHOWER FOUNDATION 200 NE 4TH ST ABILENE, KS 67410	NONE	PC	SCIENTIFIC, ARTISTIC, RELIGIOUS, OR LITERARY PURPOSES	2,500
OETA OKLAHOMA PUBLIC TELEVISION PO BOX 14190 OKLAHOMA CITY, OK 73113	NONE	PC	SCIENTIFIC, ARTISTIC, RELIGIOUS, OR LITERARY PURPOSES	5,000
Total ► 3a				198,500

TY 2016 Accounting Fees Schedule**Name:** THOMAS & SALLY WOOD FAMILY FOUNDATION

C/O JAN LEONARD UMB BANK

EIN: 43-6445255

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREPARATION	6,115	3,058		3,057

TY 2016 All Other Program Related Investments Schedule

Name: THOMAS & SALLY WOOD FAMILY FOUNDATION
C/O JAN LEONARD UMB BANK
EIN: 43-6445255

Category	Amount
NONE	0

TY 2016 Investments Corporate Bonds Schedule

Name: THOMAS & SALLY WOOD FAMILY FOUNDATION
C/O JAN LEONARD UMB BANK

EIN: 43-6445255

Name of Bond	End of Year Book Value	End of Year Fair Market Value
CORPORATE BONDS	1,076,163	1,071,691
FIXED INCOME FUNDS	152,124	143,972

TY 2016 Investments Corporate Stock Schedule

Name: THOMAS & SALLY WOOD FAMILY FOUNDATION
C/O JAN LEONARD UMB BANK

EIN: 43-6445255

Name of Stock	End of Year Book Value	End of Year Fair Market Value
COMMON STOCK	3,269,561	4,281,323

TY 2016 Investments Government Obligations Schedule

Name: THOMAS & SALLY WOOD FAMILY FOUNDATION
C/O JAN LEONARD UMB BANK

EIN: 43-6445255

**US Government Securities - End
of Year Book Value:**

109,235

**US Government Securities - End
of Year Fair Market Value:**

108,512

**State & Local Government
Securities - End of Year Book
Value:**

0

**State & Local Government
Securities - End of Year Fair
Market Value:**

0

TY 2016 Investments - Other Schedule

Name: THOMAS & SALLY WOOD FAMILY FOUNDATION
C/O JAN LEONARD UMB BANK

EIN: 43-6445255

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
TORTOISE ENERGY	AT COST	169,998	134,177
LINWOOD PROPERTIES TRUST	AT COST	55,360	55,360

TY 2016 Other Expenses Schedule

Name: THOMAS & SALLY WOOD FAMILY FOUNDATION
C/O JAN LEONARD UMB BANK

EIN: 43-6445255

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FIDUCIARY FEE	27,913	27,913		0
MISCELLANEOUS EXPENSES	1,050	1,050		0

TY 2016 Other Income Schedule

Name: THOMAS & SALLY WOOD FAMILY FOUNDATION
C/O JAN LEONARD UMB BANK

EIN: 43-6445255

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
OTHER INCOME	24,254	24,254	24,254

TY 2016 Taxes Schedule

Name: THOMAS & SALLY WOOD FAMILY FOUNDATION
C/O JAN LEONARD UMB BANK

EIN: 43-6445255

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	705	705		0
FEDERAL TAXES	5,423	0		0