

efile GRAPHIC print - DO NOT PROCESS

As Filed Data -

DLN: 93491317007267

Form 990-PF

Department of the Treasury
Internal Revenue Service

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

Do not enter social security numbers on this form as it may be made public.
Information about Form 990-PF and its instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2016

Open to Public Inspection

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

Name of foundation
JOHN AND SUE ANTHONY CHARITABLE TR

A Employer identification number
45-3555793

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

Room/suite

B Telephone number (see instructions)
(870) 285-2711

City or town, state or province, country, and ZIP or foreign postal code
MURFREESBORO, AR 71958

C If exemption application is pending, check here

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

D 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) \$ 5,000,693

J Accounting method

☒ Cash

☐ Accrual

☐ Other (specify)

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)			
	2 Check ☒ if the foundation is not required to attach Sch B			
	3 Interest on savings and temporary cash investments	5,639	5,639	
	4 Dividends and interest from securities	67,813	67,813	
	5a Gross rents			
	b Net rental income or (loss)			
	6a Net gain or (loss) from sale of assets not on line 10	-1,897		
	b Gross sales price for all assets on line 6a 505,684			
	7 Capital gain net income (from Part IV, line 2)		9,921	
	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)	944			
12 Total. Add lines 1 through 11	72,499	83,373		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	55,300		
	14 Other employee salaries and wages			
	15 Pension plans, employee benefits			
	16a Legal fees (attach schedule)			
	b Accounting fees (attach schedule)	1,750		1,750
	c Other professional fees (attach schedule)	11,089	11,089	
	17 Interest			
	18 Taxes (attach schedule) (see instructions)	598		
	19 Depreciation (attach schedule) and depletion			
	20 Occupancy			
	21 Travel, conferences, and meetings			
	22 Printing and publications			
	23 Other expenses (attach schedule)	4,545		4,545
	24 Total operating and administrative expenses. Add lines 13 through 23	73,282	11,089	6,295
	25 Contributions, gifts, grants paid	258,308		258,308
26 Total expenses and disbursements. Add lines 24 and 25	331,590	11,089	264,603	
	27 Subtract line 26 from line 12			
	a Excess of revenue over expenses and disbursements	-259,091		
	b Net investment income (if negative, enter -0-)		72,284	
c Adjusted net income (if negative, enter -0-)				

For Paperwork Reduction Act Notice, see instructions.

Cat No 11289X

Form 990-PF (2016)

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)			
		Beginning of year (a) Book Value	End of year (b) Book Value (c) Fair Market Value		
Assets	1	Cash—non-interest-bearing	7	5	
	2	Savings and temporary cash investments	2,993,699	2,428,657	2,428,657
	3	Accounts receivable ▶ <u>2,958</u>			
		Less allowance for doubtful accounts ▶ _____	2,594	2,958	2,958
	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)	2,167,999	2,483,227	2,393,270
	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)	185,447	175,808	175,808	
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)	5,349,746	5,090,655	5,000,693	
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	
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	5,349,746	5,090,655	
	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			
	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)	5,349,746	5,090,655	
	31	Total liabilities and net assets/fund balances (see instructions) .	5,349,746	5,090,655	

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	5,349,746
2	Enter amount from Part I, line 27a	2	-259,091
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3	4	5,090,655
5	Decreases not included in line 2 (itemize) ▶ _____	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	5,090,655

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			

(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			
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			
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	9,921
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	263,486	5,319,914	0 049528
2014	146,501	5,381,764	0 027222
2013	47,754	3,613,672	0 013215
2012		492,500	
2011			

2 Total of line 1, column (d)	2	0 089965
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 029988
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	5,026,777
5 Multiply line 4 by line 3	5	150,743
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	723
7 Add lines 5 and 6	7	151,466
8 Enter qualifying distributions from Part XII, line 4 ,	8	264,603

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	723
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	723
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	723
6	Credits/Payments		
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a	590
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	590
8	Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached	8	2
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	135
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	
11	Enter the amount of line 10 to be Credited to 2017 estimated tax ☐ Refunded ☐	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities</i>	1b	No
c Did the foundation file Form 1120-POL for this year?	1c	No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ☐ \$ _____ (2) On foundation managers ☐ \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities</i>	2	No
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>	3	No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	No
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T</i>	5	No
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ AR		
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	
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		
14	The books are in care of VAN DALE STUEART Telephone no (870) 285-2711			

Located at **PO BOX A MURFREESBORO AR** ZIP+4 **71958**

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

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

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).				
(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
VAN DALE STUEART PO BOX A MURFREESBORO, AR 71958	TRUSTEE 000 00	27,650	0	0
JONDAL FUNDERBURG PO BOX A MURFREESBORO, AR 71958	TRUSTEE 000 00	27,650	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. ▶				

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.		

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 N/A	
2	
All other program-related investments. See instructions.	
3	
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	2,296,190
b	Average of monthly cash balances.	1b	2,622,677
c	Fair market value of all other assets (see instructions).	1c	184,460
d	Total (add lines 1a, b, and c).	1d	5,103,327
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	
3	Subtract line 2 from line 1d.	3	5,103,327
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	76,550
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	5,026,777
6	Minimum investment return. Enter 5% of line 5.	6	251,339

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	251,339
2a	Tax on investment income for 2016 from Part VI, line 5.	2a	723
b	Income tax for 2016 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	723
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	250,616
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	250,616
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	250,616

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	264,603
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	
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	264,603
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	723
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	263,880

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				250,616
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only.			258,216	
b Total for prior years 20____, 20____, 20____				
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.				
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ 264,603				
a Applied to 2015, but not more than line 2a			258,216	
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2016 distributable amount.				6,387
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b				
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.				
d Subtract line 6c from line 6b Taxable amount—see instructions				
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				244,229
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).				
8 Excess distributions carryover from 2011 not applied on line 5 or line 7 (see instructions).				
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a				
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 VAN STUEART PO BOX A MURFREESBORO, AR 71958 (870) 285-2711	
b The form in which applications should be submitted and information and materials they should include NO PRESCRIBED FORMAT	
c Any submission deadlines NO APPLICATION DEADLINES	
d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors AWARDS WILL GENERALLY BE LIMITED TO ORGANIZATION OPERATING IN THE SOUTHWEST ARKANSAS REGION SOME OF THE CONSIDERATIONS WILL BE CHARITABLE ORGANIZATIONS WHICH WILL BE GIVEN PREFERENCES FOR DISTRIBUTION AS FOLLOWS 1) ESTABLISHED AND RECOGNIZED RELIGIOUS ORGANIZATIONS 2) RECOGNIZED AND ACCREDITED, CHURCH-SUPPORTED COLLEGES, AND UNIVERSITIES 3) CHARITABLE INSTITUTIONS IN MURFREESBORO, AR 4) CHARITABLE INSTITUTIONS IN THE STATE OF ARKANSAS 5) CHURCH-SUPPORTED ORPHANAGES	

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	258,308
b <i>Approved for future payment</i>				
Total			3b	

Enter gross amounts unless otherwise indicated

(See worksheet in line 13 instructions to verify calculations)

(See worksheet in line 13 instructions to verify calculations.)

Form **990-PF** (2016)

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

Sign	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

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

Phone no (501) 372-2136

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 FAMILY ASSN PO BOX 2440 TUPELO, MS 38803	NONE		SOCIAL WELFARE	3,100
ANTIOCH COMMUNITY CHURCH 2104 PRAIRIE TERRANCE LAWRENCE, KS 66046	NONE		RELIGIOUS	1,750
BRIDGES FOR PEACE PO BOX 410037 MELBOURNE, FL 32941	NONE		SOCIAL WELFARE	15,600
CADC PO BOX 580 BENTON, AR 72018	NONE		SOCIAL WELFARE	2,000
CENTRAL ASSEMBLY OF GOD PO BOX 5355 BOSSIER CITY, LA 71111	NONE		RELIGIOUS	3,000
Total ▶ 3a				258,308

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>				
CHI ST VINCENT FDN 2 ST VINCENT CR LITTLE ROCK, AR 72205	NONE		SOCIAL WELFARE	19,600
CHURCH IN THE WILDWOOD PO BOX 197 WINTHROP, AR 71866	NONE		RELIGIOUS	1,200
COOPER ANTHONY CHILD ADVOCACY CENTE 216 MCAULEY COURT HOT SPRINGS, AR 71913	NONE		SOCIAL WELFARE	8,108
DEQUEEN FIRST ASSEMBLY OF GOD PO BOX 146 DEQUEEN, AR 71832	NONE		RELIGIOUS	21,100
FIRST ASSEMBLY OF GOD 4501 BURROW DRIVE NORTH LITTLE ROCK, AR 72116	NONE		RELIGIOUS	1,000
Total ▶ 3a				258,308

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>				
FOOD FOR THE POOR INC 6401 LYONS ROAD COCONUT CREEK, FL 33073	NONE		SOCIAL WELFARE	5,000
GIDEONS INTL PO BOX 140800 NASHVILLE, TN 37214	NONE		RELIGIOUS	2,400
HARVEST REGIONAL FOOD BANK PO BOX 707 TEXARKANA, TX 75504	NON		SOCIAL WELFARE	1,500
HARVEST TIME ASSEMBLY OF GOD 1001 S WASHINGTON MURFREESBORO, AR 71958	NONE		RELIGIOUS	43,900
J & J MINISTRY PO BOX 412 POTTSVILLE, AR 72858	NONE		RELIGIOUS	2,000
Total ► 3a				258,308

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>				
LIFE TABERNACLE UPC PO BOX 517 NASHVILLE, AR 71852	NONE		RELIGIOUS	10,600
LITTLE ROCK COMPASSION CENTER PO BOX 4249 LITTLE ROCK, AR 72214	NONE		SOCIAL WELFARE	1,000
MAULDIN MINISTRIES PO BOX 140402 BROKEN ARROW, OK 74014	NONE		RELIGIOUS	7,000
NASHVILLE FIRST BAPTIST CHURCH 415 N MAIN NASHVILLE, AR 71852	NON		RELIGIOUS	2,000
OAK GROVE CEMETERY 2240 HWY 27N NASHVILLE, AR 71852	NON		SOCIAL WELFARE	3,500
Total ▶ 3a				258,308

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>				
OASIS MINISTRIES PO BOX 3282 RICEVILLE, TN 37310	NONE		RELIGIOUS	8,750
OPEN BIBLE MINISTRY PO BOX 364 PRESCOTT, AR 71857	NONE		RELIGIOUS	26,100
OUR DAILY BREAD 3000 KRAFT AVE SE GRAND RAPIDS, MI 49512	NONE		SOCIAL WELFARE	300
PIKE CO ARCHIVESHISTORY SOCIETY PO BOX 875 MURFREESBORO, AR 71958	NONE		SOCIAL WELFARE	500
POTTERS CLAY 110 CRESCENT HOT SPRINGS, AR 71901	NONE		RELIGIOUS	6,400
Total 				258,308
3a				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
RAVEN MINISTRIES INT'L TRAINING CEN 511 W BANK EXPRESSWAY GRETNA, LA 70053	NONE		SOCIAL WELFARE	2,000
REM MINISTRIES 1112 MORNING GLORY CR NEW BRAUNFELS, TX 78130	NONE		RELIGIOUS	1,500
SAMARITAN'S PURSE PO BOX 3000 BOONE, NC 28607	NONE		RELIGIOUS	8,200
SEED OF SALLY DOCUMENTARY 21 KENSINGTON ROAD SCARSDALE, NY 10583	NONE		SOCIAL WELFARE	500
SOARING WINGS CHRISTIAN HOMERANCH PO BOX 1670 CONWAY, AR 72033	NONE		SOCIAL WELFARE	4,000
Total ▶ 3a				258,308

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>				
SW ARK DOMESTIC VIOLENCE CTR PO BOX 87 DEQUEEN, AR 71832	NONE		SOCIAL WELFARE	1,200
TEEN CHALLENGE PO BOX 8177 HOT SPRINGS, AR 71910	NONE		SOCIAL WELFARE	14,500
TEEN CHALLENGE WOMEN'S MINISTRIES PO BOX 10443 RUSSELLVILLE, AR 72812	NONE		SOCIAL WELFARE	3,500
TEXARKANA CHILD ADVOCACY CENTER PO BOX 1546 TEXARKANA, AR 72504	NONE		SOCIAL WELFARE	4,200
TURPENTINE CREEK WILDLIFE REFUGE & 239 TURPENTINE CREEK LAND EUREKA SPRINGS, AR 72632	NONE		SOCIAL WELFARE	6,000
Total 				258,308
3a				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
UA AGRI SYSTEMS DIVISION 2404 N UNIVERSITY AVE LITTLE ROCK, AR 72207	NONE		SOCIAL WELFARE	1,900
UAMS REYNOLDS INST ON AGING 4301 W MARKHAM LITTLE ROCK, AR 72205	NONE		SOCIAL WELFARE	11,000
VOICE OF EVANGELISM PO BOX 3595 CLEVELAND, TN 37320	NONE		RELIGIOUS	1,400
WALLBUILDERS PO BOX 397 ALED0, TX 76008	NONE		RELIGIOUS	500
WATERSHED HUMAN & COMMUNITY DEV PO BOX 656 COLLEGE STATION, AR 72053	NONE		SOCIAL WELFARE	500
Total ► 3a				258,308

TY 2016 Accounting Fees Schedule**Name:** JOHN AND SUE ANTHONY CHARITABLE TR**EIN:** 45-3555793

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	1,750			1,750

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

TY 2016 Gain/Loss from Sale of Other Assets Schedule

Name: JOHN AND SUE ANTHONY CHARITABLE TR

EIN: 45-3555793

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
UNION COUNTY	2013-03	PURCHASE	2016-02		25,000	14,999			10,001	
RBS CAPITAL	2013-08	PURCHASE	2016-06		50,889	50,520			369	
GENERAL MOTORS	2013-03	PURCHASE	2016-06		18	19			-1	
AMG	2013-03	PURCHASE	2016-09		1,040	1,049			-9	
BLACKROCK	2015-10	PURCHASE	2016-09		99,494	104,992			-5,498	
FIDELITYEMERG	2013-03	PURCHASE	2016-09		3,535	3,679			-144	
FIDELITY ADV SHORT	2015-09	PURCHASE	2016-09		135,739	135,169			570	
AMER FDS WASHIGTON	2015-04	PURCHASE	2016-09		21,854	21,844			10	
ABERRDEN TOTAL RETURN	2015-07	PURCHASE	2016-09		141,679	141,448			231	
BROOKFIELD	2015-09	PURCHASE	2016-09		8,053	7,113			940	
AMER EURO	2013-03	PURCHASE	2016-09		107	95			12	
PIMCO	2014-08	PURCHASE	2016-09		1,516	1,610			-94	
ABERDEEN TOTAL	2016-08	PURCHASE	2016-09		1,853	1,791			62	
BLACKROCK FDS	2016-09	PURCHASE	2016-09		3,438	3,425			13	
FIDELITY FDS ADV	2016-09	PURCHASE	2016-09		1,509	1,501			8	
BASISI ADJUSTMENT	2016-12	PURCHASE	2016-12			274			-274	
RIDGEWOOD ENERGY-P FUND	2013-03	PURCHASE	2016-12		39	9,639			-9,600	
KMART	2014-01	PURCHASE	2016-12			8,414			-8,414	

TY 2016 Investments Corporate Stock Schedule

Name: JOHN AND SUE ANTHONY CHARITABLE TR

EIN: 45-3555793

Name of Stock	End of Year Book Value	End of Year Fair Market Value
SECURITITES	2,483,227	2,393,270

TY 2016 Investments - Other Schedule**Name:** JOHN AND SUE ANTHONY CHARITABLE TR**EIN:** 45-3555793

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
RIDGEWOOD-L	FMV	7,834	7,834
RIDGEWOOD-N	FMV	12,656	12,656
RIDGEWOOD-O	FMV	12,818	12,818
RIDGEWOOD P	FMV		
RETAIL PROPERTIES OF AMERICA	FMV	142,500	142,500

TY 2016 Other Expenses Schedule**Name:** JOHN AND SUE ANTHONY CHARITABLE TR**EIN:** 45-3555793**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXPENSES				
OFFICE CONTRACT LABOR	3,345			3,345
OFFICE EXPENSE	1,200			1,200

TY 2016 Other Income Schedule

Name: JOHN AND SUE ANTHONY CHARITABLE TR

EIN: 45-3555793

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
MISC	944		

TY 2016 Other Professional Fees Schedule**Name:** JOHN AND SUE ANTHONY CHARITABLE TR**EIN:** 45-3555793

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT ADIVISORY	11,089	11,089		

TY 2016 Taxes Schedule**Name:** JOHN AND SUE ANTHONY CHARITABLE TR**EIN:** 45-3555793

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INCOME TAX	489			
FOREIGN TAX	109			