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

Name of foundation HELEN STAMBAUGH CHARITABLE FUND		A Employer identification number 45-6336031	
Number and street (or P O box number if mail is not delivered to street address) PO BOX 1558 DEPT EA4E86		Room/suite	B Telephone number (see instructions) (330) 742-7036
City or town, state or province, country, and ZIP or foreign postal code COLUMBUS, OH 43216		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 6,113,579	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)				
	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	140,426	140,426		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	19,223			
	b Gross sales price for all assets on line 6a 935,669				
	7 Capital gain net income (from Part IV, line 2)		19,223		
	8 Net short-term capital gain			0	
	9 Income modifications				
	10a Gross sales less returns and allowances _____				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	159,649	159,649		
	13 Compensation of officers, directors, trustees, etc	50,662	25,331		25,331
	14 Other employee salaries and wages		0	0	0
	15 Pension plans, employee benefits		0	0	
	16a Legal fees (attach schedule)				0
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)				0
	17 Interest				0
	18 Taxes (attach schedule) (see instructions)	2,720	759		0
	19 Depreciation (attach schedule) and depletion	0	0		
	20 Occupancy				
	21 Travel, conferences, and meetings		0	0	
	22 Printing and publications		0	0	
	23 Other expenses (attach schedule)	200			200
	24 Total operating and administrative expenses. Add lines 13 through 23	53,582	26,090	0	25,531
	25 Contributions, gifts, grants paid	275,700			275,700
	26 Total expenses and disbursements. Add lines 24 and 25	329,282	26,090	0	301,231
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-169,633			
	b Net investment income (if negative, enter -0-)		133,559		
	c Adjusted net income(if negative, enter -0-)			0	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions.)			
		Beginning of year (a) Book Value	End of year (b) Book Value (c) Fair Market Value		
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	82,011	334,793	334,793
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____		0	0
	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 ▶ _____ 0			
	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)	2,919,881	2,605,569	3,788,328
	c	Investments—corporate bonds (attach schedule)	1,961,247	1,927,035	1,910,944
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	79,514	79,514	79,514
	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)	5,042,653	4,946,911	6,113,579	
Liabilities	17	Accounts payable and accrued expenses		68,925	
	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)		68,925	
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	5,042,653	4,877,986	
	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)	5,042,653	4,877,986		
31	Total liabilities and net assets/fund balances (see instructions) .	5,042,653	4,946,911		

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	5,042,653
2	Enter amount from Part I, line 27a	2	-169,633
3	Other increases not included in line 2 (itemize) ▶ _____	3	6,763
4	Add lines 1, 2, and 3	4	4,879,783
5	Decreases not included in line 2 (itemize) ▶ _____	5	1,797
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	4,877,986

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	19,223
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	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	276,029	6,111,350	0 045167
2014	206,517	6,108,000	0 033811
2013	98,672	5,718,074	0 017256
2012			
2011			

2 Total of line 1, column (d)	2	0 096234
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 024059
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	5,929,125
5 Multiply line 4 by line 3	5	142,649
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,336
7 Add lines 5 and 6	7	143,985
8 Enter qualifying distributions from Part XII, line 4	8	301,231

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	1,336
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	1,336
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	1,336
6	Credits/Payments		
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a	876
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	0
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d.	7	876
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	9
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	469
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 ☐ 0 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)? <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) ☐ OH		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation</i> .	8b	Yes
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>	9	No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	10	No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ►	13	Yes	
14	The books are in care of ► THE HUNTINGTON NATIONAL BANK Telephone no ► (330) 742-7036			

Located at ► PO BOX 1558 DEPT EA4E86 COLUMBUS OH ZIP+4 ► 43216

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

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

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

1a	During the year did the foundation (either directly or indirectly)		Yes	No
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No		
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No		
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☒ Yes ☐ No		
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No		
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days).	☐ Yes ☒ No		
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?		1b	No
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	No
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No		
b	If "Yes," did it have excess business holdings in 2016 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2016).		3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a	No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2016?		4b	No

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

5a During the year did the foundation pay or incur any amount to (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No (4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions). ☐ Yes ☒ No (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No b If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? ☐ Yes ☒ No Organizations relying on a current notice regarding disaster assistance check here. ☐ Yes ☒ No c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☒ No <i>If "Yes," attach the statement required by Regulations section 53.4945–5(d)</i>	5b		
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ Yes ☒ No <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
HUNTINGTON NATIONAL BANK PO BOX 1558 DEPT EA4E86 COLUMBUS, OH 43216	TRUSTEE 1	50,662		
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	Title, and average hours per week (b) devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
NONE				
Total number of other employees paid over \$50,000.				0

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.		0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	

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	5,781,626
b	Average of monthly cash balances.	1b	237,790
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	6,019,416
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	6,019,416
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	90,291
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	5,929,125
6	Minimum investment return. Enter 5% of line 5.	6	296,456

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	296,456
2a	Tax on investment income for 2016 from Part VI, line 5.	2a	1,336
b	Income tax for 2016 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	1,336
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	295,120
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	295,120
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	295,120

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	301,231
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	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	4	301,231
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	1,336
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	299,895

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				295,120
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only.			299,622	
b Total for prior years 2014, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2016				
a From 2011. 0				
b From 2012. 0				
c From 2013. 0				
d From 2014. 0				
e From 2015. 0				
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ 301,231				
a Applied to 2015, but not more than line 2a			299,622	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2016 distributable amount.				1,609
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a))	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
b Prior years' undistributed income Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2015 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2017				293,511
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2011 not applied on line 5 or line 7 (see instructions).	0			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	0			
10 Analysis of line 9				
a Excess from 2012. 0				
b Excess from 2013. 0				
c Excess from 2014. 0				
d Excess from 2015. 0				
e Excess from 2016. 0				

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))
NONE

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
NONE

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

a The name, address, and telephone number or email address of the person to whom applications should be addressed

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

c Any submission deadlines

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

Part XV **Supplementary Information** (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> ST JOHNS EVANGELICAL LUTHERN CHURCH 1429 MAHONING YOUNGSTOWN, OH 44509	NONE	PC	GENERAL SUPPORT	275,700
Total			▶ 3a	275,700
b <i>Approved for future payment</i>				
Total			▶ 3b	

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments.					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities.			14	140,426	
5 Net rental income or (loss) from real estate					
a Debt-financed property.					
b Not debt-financed property.					
6 Net rental income or (loss) from personal property					
7 Other investment income.					
8 Gain or (loss) from sales of assets other than inventory			18	19,223	
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).				159,649	
13 Total. Add line 12, columns (b), (d), and (e).			13		159,649

(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

**Sign
Here**

* * * * *

Title

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

**Paid
Preparer
Use Only**

Print/Type preparer's name JOSEPH B HULL	Preparer's Signature	Date 2017-04-26	Check if self-employed ☐	PTIN P00135850
Firm's name ▶ ERNST & YOUNG US LLP				Firm's EIN ▶ 34-6565596
Firm's address ▶ 800 YARD STREET SUITE 200 GRANDVIEW HEIGHTS, OH 43212				Phone no (614) 232-7290

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)
5400 JEFFERIES TR/J ALERIAN MLP ETF		2014-07-31	2016-02-10
500 BROADCOM CORP		2011-09-16	2016-02-03
500 BROADCOM CORP		2011-08-29	2016-02-03
1000 BROADCOM CORP		2011-12-19	2016-02-03
1000 CONOCOPHILLIPS			2016-02-03
680 DEERE & COMPANY		2013-09-30	2016-08-31
38 DELL TECHNOLOGIES INC CL V		2015-01-01	2016-11-21
200 DOW CHEMICAL CO		2011-09-28	2016-03-22
3000 E M C CORP			2016-09-07
3655 793 FEDERATED INSTITUTIONAL HIGH YIELD BOND		2015-05-29	2016-01-26

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)
44,610		100,332	-55,722
27,387		17,820	9,567
27,387		17,405	9,982
54,775		28,760	26,015
36,750		54,751	-18,001
57,609		55,796	1,813
18		18	
10,228		4,878	5,350
87,933		67,670	20,263
32,500		36,704	-4,204

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	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
			-55,722
			9,567
			9,982
			26,015
			-18,001
			1,813
			5,350
			20,263
			-4,204

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)
1287 275 FEDERATED INSTITUTIONAL HIGH YIELD BOND		2014-02-24	2016-02-09
1548 39 FEDERATED INSTITUTIONAL HIGH YIELD BOND		2015-05-29	2016-02-09
323 858 FEDERATED INTERNATIONAL LEADERS FUND		2014-08-04	2016-05-26
692 058 FEDERATED INTERNATIONAL LEADERS FUND		2015-10-07	2016-05-26
100000 GENERAL ELEC CAP CORP SERIES MTN 3 35% 1		2011-10-14	2016-10-17
500 GILEAD SCIENCES INC		2011-08-31	2016-03-22
500 GILEAD SCIENCES INC		2011-08-31	2016-05-18
100000 JP MORGAN CHASE & CO 3 15% 07/05/2016		2011-08-12	2016-07-05
JOHNSON CTLS INC 5% 03/30/2020			2016-12-28
150 KOHLS CORP		2014-09-24	2016-03-22

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)
11,199		13,310	-2,111
13,471		15,546	-2,075
9,564		10,830	-1,266
20,436		22,347	-1,911
100,000		100,000	
46,814		9,923	36,891
41,263		9,923	31,340
100,000		100,000	
50			50
7,045		9,335	-2,290

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	
			-2,111
			-2,075
			-1,266
			-1,911
			36,891
			31,340
			50
			-2,290

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)
300 KOHLS CORP		2014-09-24	2016-05-18
149 218 PRUDENTIAL JENNISON MID CAP GROWTH FUND		2014-06-19	2016-02-09
187 627 ROYCE TOTAL RETURN FUND			2016-02-09
380 SUNCOR ENERGY INC		2012-01-03	2016-03-22
3281 25 FRANKLIN TEMPLETON GLOBAL BOND FUND - AD			2016-01-26
2229 895 FRANKLIN TEMPLETON GLOBAL BOND FUND - AD		2011-08-15	2016-06-23
450 V F CORP W/1 RT/SH			2016-06-15
96 651 VANGUARD MID CAP INDEX FUND - ADMIRAL S		2015-02-09	2016-02-09
1363 VODAFONE GROUP PLC - SP ADR			2016-03-22
300 MEDTRONIC PLC		2015-01-28	2016-03-22

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)
10,460		18,669	-8,209
4,547		6,242	-1,695
2,079		2,502	-423
10,596		11,465	-869
36,750		45,011	-8,261
25,086		30,133	-5,047
28,006		14,788	13,218
12,574		14,851	-2,277
42,416		68,481	-26,065
22,431		22,372	59

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	
			-8,209
			-1,695
			-423
			-869
			-8,261
			-5,047
			13,218
			-2,277
			-26,065
			59

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)
48 BROADCOM LTD		2011-08-29	2016-02-18
48 BROADCOM LTD			2016-03-22
CAPITAL GAIN 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)
58		65	-7
7,424		6,519	905
			4,203

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	
			-7
			905

TY 2016 Compensation Explanation

Name: HELEN STAMBAUGH CHARITABLE FUND

EIN: 45-6336031

Person Name	Explanation
HUNTINGTON NATIONAL BANK	TRUSTEE FEES

TY 2016 Investments Corporate Bonds Schedule**Name:** HELEN STAMBAUGH CHARITABLE FUND**EIN:** 45-6336031

Name of Bond	End of Year Book Value	End of Year Fair Market Value
BB&T CORPORATION SERIES MTN 2.	100,484	100,139
BANK OF NEW YORK MELLON 3.55%	103,412	104,147
DOW CHEMICAL CO SERIES NOT1 3.	100,000	100,035
EATON VANCE FLOATING-RATE FUND	100,000	97,654
EBAY INC 3.25% 10/15/2020-2020	51,234	51,176
FHLB .75% 12/08/2017	99,633	99,796
FHLMC 1.25% 10/02/2019	98,243	99,415
FEDERATED INSTITUTIONAL HIGH Y	86,690	83,367
GENERAL ELEC CAP CORP 5.625% 0	101,761	105,540
GENERAL ELEC CAP CORP SERIES M		
HEWLETT PACKARD CO 3.75% 12/01	51,128	51,770
INTEL CORP 2.7% 12/15/2022	73,222	75,338
JP MORGAN CHASE & CO 3.15% 07/		
JOHNSON CTLS INC 5% 03/30/2020		
KEY BANK NA SERIES BKNT 2.5% 1	50,261	50,521
PIMCO LOW DURATION FUND - INST	53,414	49,870
POWERSHARES PREFERRED PORTFOLI	105,324	104,591
FRANKLIN TEMPLETON GLOBAL BOND	89,522	80,965
US TREASURY 1.375% 12/31/2018	100,000	100,324
VANGUARD SHORT TERM FEDERAL-AD	100,000	99,646

Name of Bond	End of Year Book Value	End of Year Fair Market Value
WELLS FARGO & COMPANY SERIES G	50,069	50,289
XILINX 2.125% 03/15/2019	50,152	50,051
ABBVIE INC 1.2% 11/06/2015 ACE		
ABBOTT LABORATORIES 2.55%	50,542	48,868
APPLE INC 2.85% 02/23/2023-202	102,707	100,623
BANK NOVA SCOTIA N Y AGY 2.8%	51,068	50,379
GILEAD SCIENCES INC 3.7%	106,195	102,643
JOHNSON CONTROLS INTL PL 5%	51,974	53,797

TY 2016 Investments Corporate Stock Schedule

Name: HELEN STAMBAUGH CHARITABLE FUND
EIN: 45-6336031

Name of Stock	End of Year Book Value	End of Year Fair Market Value
JEFFERIES TR/J ALERIAN MLP ETF		
APPLE INC	18,264	24,322
BAXTER INTERNATIONAL INC W/1 R	37,362	52,765
BRISTOL-MYERS SQUIBB CO	46,835	99,348
BROADCOM CORP CL A		
CVS HEALTH CORPORATION	35,784	63,128
CAPITAL ONE FINANCIAL CORP	66,883	71,537
CARDINAL HEALTH INC	41,953	71,970
CHURCH & DWIGHT CO INCN W/1 RT	39,001	88,380
CISCO SYSTEMS	51,366	90,660
COMCAST CORP CL A	70,856	138,100
CONOCOPHILLIPS		
DEERE & CO W/1 RT/SH		
DOW CHEMICAL	36,494	85,830
EMC CORP/MASS		
EBAY INC	26,224	59,380
EMERSON ELECTRIC CO	59,878	72,475
EXXON MOBIL CORP	101,085	116,435
FEDERATED INTERNATIONAL LEADER	198,808	174,492
FIDELITY REAL ESTATE INCOME FU	100,000	99,034
FIRST EAGLE OVERSEAS FUND - CL	85,698	81,524
GENERAL ELECTRIC CO	60,190	110,600
GILEAD SCIENCES INC		
HARBOR INTERNATIONAL FUND	25,118	20,652
HOME DEPOT INC	62,075	67,040
HONEYWELL INTERNATIONAL INC	20,468	23,170
JP MORGAN CHASE & CO	51,243	129,435
KLA-TENCOR CORP	15,918	23,604
KOHL'S CORP		
THE KROGER CO	28,352	86,275

Name of Stock	End of Year Book Value	End of Year Fair Market Value
NEXTERA ENERGY INC	31,686	35,838
NUCOR CORP W/1 RT/SH	32,599	59,520
ORACLE CORPORATION	53,671	73,055
OPPENHEIMER DEVELOPING MARKETS	41,682	38,265
PNC FINANCIAL SERVICES	49,095	116,960
PAYPAL HOLDINGS INC	38,636	78,940
PEPSICO INC	44,175	73,241
PRUDENTIAL JENNISON MID CAP GR	18,758	15,781
ROYCE TOTAL RETURN FUND	7,494	7,691
SCHLUMBERGER LTD	38,294	41,975
SEMPRA ENERGY	47,920	90,576
SMUCKER (J.M.) CO THE- NEW COM	19,709	29,454
STARBUCKS CORP	61,670	55,520
STATE STREET CORP	33,206	77,720
STRYKER CORP	22,588	47,924
SUNCOR ENERGY INC	30,172	32,690
TEXAS INSTRUMENTS INC	135,320	255,395
TRAVELERS COS INC	25,263	61,210
UNITED TECHNOLOGIES CORP	49,356	76,734
V F CORP	38,358	72,023
VALERO ENERGY CORP	60,260	68,320
VANGUARD MID CAP INDEX FUND -	44,454	47,139
VERIZON COMMUNICATIONS	43,642	48,042
VOFDAFONE GROUP PLC - SP ADR		
MEDTRONIC PLC	90,138	85,476
ACE LIMITED		
CALIFORNIA RESOURCES CORP		
HUNTINGTON SITUS FUND III		
OCCIDENTAL PETROLEUM CORP		
PARAGON OFFSHORE LTD		

Name of Stock	End of Year Book Value	End of Year Fair Market Value
VIACOM INC CLASS B		
ADVANSIX INC	110	177
AT&T INC	46,542	51,036
CHUBB LIMITED	62,730	132,120
D.R. HORTON INC	30,527	27,330
DELL TECHNOLOGIES INC CL V	15,765	18,360
GATEWAY FUND - CLASS Y	43,870	47,775
LOCKHEED MARTIN CORPORATION	58,024	59,986
VANGUARD SMALL CAP INDEX -	10,000	11,899

TY 2016 Investments - Other Schedule

Name: HELEN STAMBAUGH CHARITABLE FUND

EIN: 45-6336031

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
ST JOHN'S EVANGELICAL LUTHERAN	AT COST	79,514	79,514

TY 2016 Other Decreases Schedule

Name: HELEN STAMBAUGH CHARITABLE FUND
EIN: 45-6336031

Description	Amount
2017 TRANSACTIONS POSTED IN 2016	1,797

TY 2016 Other Expenses Schedule**Name:** HELEN STAMBAUGH CHARITABLE FUND**EIN:** 45-6336031**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
STATE FILING FEES	200	0		200

TY 2016 Other Increases Schedule

Name: HELEN STAMBAUGH CHARITABLE FUND

EIN: 45-6336031

Description	Amount
RETURN OF CAPITAL	4,649
2016 TRANSACTIONS POSTED IN 2015	1,284
ACCRETION TAX LOT ADJUSTMENTS	830

TY 2016 Taxes Schedule**Name:** HELEN STAMBAUGH CHARITABLE FUND**EIN:** 45-6336031

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL TAX PAYMENT - PRIOR YE	1,092	0		0
FEDERAL ESTIMATES - PRINCIPAL	869	0		0
FOREIGN TAXES ON QUALIFIED FOR	641	641		0
FOREIGN TAXES ON NONQUALIFIED	118	118		0