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Form 990-PF

Return of Private Foundation

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

OMB No 1545-0052 2016

Department of the Treasury

Do not enter social security numbers on this form as it may be made public.

Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf. Open to Public Inspection Internal Revenue Service For calendar year 2016 or tax year beginning and ending Name of foundation A Employer identification number The Foundation for Excellence in Higher Education Inc Number and street (or PO box number if mail is not delivered to street address) Room/suite 46-1439784 B Telephone number (see instructions) 16 Stockton Street City or town, state or province, country, and ZIP or foreign postal code Princeton NJ 08540 (730) 600-3733 Foreign country name Foreign province/state/county Foreign postal code C If exemption application is pending, check here G Check all that apply Initial return D 1. Foreign organizations, check here Initial return of a former public charity Final return Amended return 2. Foreign organizations meeting the 85% test. Address change ☐ Name change check here and attach computation H Check type of organization X Section 501(c)(3) exempt private foundation E If private foundation status was terminated under section 507(b)(1)(A), check here Accounting method Fair market value of all assets at Cash X Accrual F If the foundation is in a 60-month termination end of year (from Part II, col (c), Other (specify) under section 507(b)(1)(B), check here line 16) ▶ \$ 6,383,732 (Part I, column (d) must be on cash basis) Part Analysis of Revenue and Expenses (The total of (d) Disbursements (a) Revenue and (b) Net investment (c) Adjusted net for charitable amounts in columns (b), (c), and (d) may not necessarily expenses per ıncome purposes books equal the amounts in column (a) (see instructions))=7 (cash basis only) 1 Contributions, gifts, grants, etc. received (attach schedule) 1.071.920 2 Check ▶ ☐ If the foundation is not required to attach Sch. B 3 Interest on savings and tempogary cashingvestments 4 Dividends and interest from securities 23.943 23.943 5a Gross rents Net rental income of (loss)) GDEN. UT Net gain or (loss) from sale of assets not on line 10 212,396 6a Gross sales price for all assets on line 6a 4,535,565 Capital gain net income (from Part IV, line 2) 212,396 7 8 Net short-term capital gain 9 Income modifications 10a Gross sales less returns and allowances b Less Cost of goods sold . Gross profit or (loss) (attach schedule) 11 Other income (attach schedule) -2,979 -2,979 1,305,280 233,360 12 Total. Add lines 1 through 11 13 Compensation of officers, directors, trustees, etc. Operating and Administrative Expenses 14 Other employee salaries and wages 15 Pension plans, employee benefits 16a Legal fees (attach schedule) 19,305 Accounting fees (attach schedule) 19.500 8.794 Other professional fees (attach schedule) 38,794 17 Interest 18 Taxes (attach schedule) (see instructions) 19 Depreciation (attach schedule) and depletion 20 Occupancy . . 21 68.951 Travel, conferences, and meetings 22 <u>5,</u>172 Printing and publications 23 Other expenses (attach schedule) 5,486 Total operating and administrative expenses. 0 157,208 8,794 Add lines 13 through 23 748,900 25 748,900 Contributions, gifts, grants paid 26 Total expenses and disbursements. Add lines 24 and 25 906,108 8.794 0 748,900 Subtract line 26 from line 12 Excess of revenue over expenses and disbursements 399,172 Net investment income (if negative, enter -0-) 224,566

Form 990-PF (2016)

Adjusted net income (if negative, enter -0-)

Form 990-PF (2016)

4-		ne kind(s) of property sold (e.g., real estate, suse, or common stock, 200 shs MLC Co.)		(b) How acquired P—Purchase D—Donation		te acquired , day, yr)	(d) Date sold (mo , day, yr)
<u> 1a</u>	Various Stock Sales			Р		1/1/2016	12/31/2016
b							
<u> </u>							
<u>d</u>				· · · · · · · · · · · · · · · · · · ·			<u> </u>
е				L			
	(e) Gross sales price	(f) Depreciation allowed (or allowable)		other basis nse of sale		(h) Gain (e) plus (f)	
<u>a</u>	4,535,565			4,323,169			212,39
<u>b</u>							
c d							
e					-		
	Complete only for assets sh	nowing gain in column (h) and owned by t	he foundation	on 12/31/69			
		(j) Adjusted basis		s of col (ı)		(I) Gains (Col col (k), but not l	(h) gain minus less than -0-) or
	(i) F M V as of 12/31/69	as of 12/31/69		(j), if any			om col (h))
а							212,39
b			•				· ·
С							
d						· •	
_ е							
2	Capital gain net income or	Ther canital loss)	enter in Pai er -0- in Pai	,	2		212,39
3	Net short-term capital gain	or (loss) as defined in sections 1222		·			
		line 8, column (c) (see instructions)		er -0- in \			
	Part I, line 8			ſ	3		(
Part	V Qualification Und	ler Section 4940(e) for Reduce	i Tax on N	let Investment	Incom	e	
		vate foundations subject to the section	1 4940(a) tax	on net investme	nt incom	ne)	
f sec Vas 1	ion 4940(d)(2) applies, leav	re this part blank section 4942 tax on the distributable a	mount of an	ly year in the base		ŕ	☐ Yes Ⅸ No
f sec Vas 1	nion 4940(d)(2) applies, leav the foundation liable for the s s," the foundation does not c	e this part blank section 4942 tax on the distributable a qualify under section 4940(e) Do not	mount of an	ly year in the base s part	e period	?	☐ Yes ☒ No
f sec Vas f	tion 4940(d)(2) applies, leave the foundation liable for the s s," the foundation does not on Enter the appropriate amo	re this part blank section 4942 tax on the distributable a qualify under section 4940(e) Do not unt in each column for each year, see	mount of an	ly year in the base s part lons before makir	e period	? Intries	(d)
f sec Was f f "Ye 1	tion 4940(d)(2) applies, leave the foundation liable for the start the foundation does not contact the appropriate amo (a) Base period years	section 4942 tax on the distributable a qualify under section 4940(e). Do not ount in each column for each year, see	mount of an complete thi	ly year in the base s part	e period'	? Intries	(d)
f sec Was f f "Ye 1	tion 4940(d)(2) applies, leave the foundation liable for the s s," the foundation does not on Enter the appropriate amo	re this part blank section 4942 tax on the distributable a qualify under section 4940(e) Do not o unt in each column for each year, see (b) Adjusted qualifying distributions	mount of an complete this the instruct	y year in the base s part ions before makir (c) of noncharitable-use as	e period' ng any e	? Intries	(d) nbution ratio livided by col (c))
f sec Vas f f "Ye 1	tion 4940(d)(2) applies, leave the foundation liable for the s s," the foundation does not on Enter the appropriate amo (a) Base penod years endar year (or tax year beginning in)	section 4942 tax on the distributable a qualify under section 4940(e). Do not ount in each column for each year, see	mount of an complete the instruct	y year in the base s part ions before makin (c) of noncharitable-use as 2,216	e period'	? Intries	(d) nbution ratio livided by col (c)) 1 07460/
f sec Was f f "Ye 1	tion 4940(d)(2) applies, leave the foundation liable for the start of the foundation does not contain the foundation of the foundation does not contain the foundation of the foundation does not contain the foundation does	re this part blank section 4942 tax on the distributable a qualify under section 4940(e) Do not o unt in each column for each year, see (b) Adjusted qualifying distributions 2,381,47	mount of an complete this the instruct Net value of the complete this the instruct of the complete the compl	y year in the bases part ions before makin (c) of noncharitable-use as 2,216 312	e period' ng any e ssets 3,152	? Intries	(d) inbution ratio livided by col. (c)) 1.07460
f sec Vas f f "Ye 1	tion 4940(d)(2) applies, leave the foundation liable for the section of the foundation does not control to the foundation of the foundation o	re this part blank section 4942 tax on the distributable a qualify under section 4940(e) Do not o unt in each column for each year, see (b) Adjusted qualifying distributions 2,381,470 3,838,96	mount of an complete this the instruct Net value of 6	y year in the bases part ions before makin (c) of noncharitable-use as 2,216 312	e period'ng any e	? Intries	(d) inbution ratio livided by col. (c)) 1 07460i 12 26701 10 79779i
f sec Was f f "Ye 1	tion 4940(d)(2) applies, leave the foundation liable for the start the foundation does not of Enter the appropriate amo (a) Base penod years endar year (or tax year beginning in) 2015 2014 2013	re this part blank section 4942 tax on the distributable a qualify under section 4940(e) Do not o unt in each column for each year, see (b) Adjusted qualifying distributions 2,381,470 3,838,96 1,088,62	mount of an complete this the instruct Net value of 6	y year in the bases part ions before makin (c) of noncharitable-use as 2,216 312	e period' ng any e ssets 6,152 2,950 0,819	? Intries	(d) nbuton ratio livided by col (c)) 1 07460 12 26701 10 79779 8 84939
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Was f f "Ye 1 Cal	he foundation liable for the start the foundation does not does no	section 4942 tax on the distributable a qualify under section 4940(e). Do not ount in each column for each year, see (b). Adjusted qualifying distributions. 2,381,47 3,838,96 1,088,62 501,20 for the 5-year base period—divide the lation has been in existence if less that	Net value of 33 3 3 3 3 3 4 total on line in 5 years	y year in the bases part ions before makin (c) of noncharitable-use as 2,216 312 100	e period ng any e ssets 6,152 2,950 0,819 6,637	ntries Distriction (col (b) d	(d) nbutton ratio livided by col (c)) 1 07460i 12 26701 10 79779 8 84939 0 000000 32 98880 8 24720 2,627,88 21,672,66
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If sec Was to If "Ye 1 Cal 2 3	tion 4940(d)(2) applies, leave the foundation liable for the start the foundation does not of Enter the appropriate amore (a) Base penod years endar year (or tax year beginning in) 2015 2014 2013 2012 2011 Total of line 1, column (d) Average distribution ratio for number of years the found Enter the net value of none Multiply line 4 by line 3 Enter 1% of net investment	re this part blank section 4942 tax on the distributable a qualify under section 4940(e). Do not ount in each column for each year, see (b) Adjusted qualifying distributions 2,381,47 3,838,96 1,088,62 501,20 For the 5-year base period—divide the lation has been in existence if less that charitable-use assets for 2016 from Point income (1% of Part I, line 27b).	Net value of 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3 3	y year in the bases part ions before makin (c) of noncharitable-use as 2,216 312 100 56	e period' ng any e ssets 6,152 2,950 0,819 6,637	2 3 4 5	(d) nbution ratio livided by col. (c)) 1 07460 12 26701 10 79779 8 84939 0 00000 32 98880 8 24720 2,627,88 21,672,66

Part \	Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see instruct	tions	s)					
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		4	,491				
	here ▶ ☐ and enter 1% of Part I, line 27b							
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	<u> </u>		1,491				
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-) .							
5	Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-	<u>i</u>		,491				
6	Credits/Payments							
a	2016 estimated tax payments and 2015 overpayment credited to 2016 6a							
b	Exempt foreign organizations—tax withheld at source 6b							
C	Tax paid with application for extension of time to file (Form 8868) 6c							
d -	Backup withholding erroneously withheld	_ -						
7	Total credits and payments Add lines 6a through 6d	${}^{-}$		0				
8 9	Enter any penalty for underpayment of estimated tax. Check here	-		19 1,510				
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.	_		۱,۵۱۱) 0				
11	Enter the amount of line 10 to be Credited to 2017 estimated tax Refunded 11		•	0				
Part \								
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it			Yes	No			
	participate or intervene in any political campaign?		1a		X			
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see							
	Instructions for the definition)?		1b		x			
	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							
C	c Did the foundation file Form 1120-POL for this year?							
d								
	(1) On the foundation ►\$ (2) On foundation managers ►\$		_					
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed	i						
_	on foundation managers ►\$				·			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?		2		X			
•	If "Yes," attach a detailed description of the activities							
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles		- -					
4a	of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes Did the foundation have unrelated business gross income of \$1,000 or more during the year?		3 4a	_	X			
b	If "Yes," has it filed a tax return on Form 990-T for this year?		4b	N/A	 ^			
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?		5	10,7 (Х			
•	If "Yes," attach the statement required by General Instruction T				<u> </u>			
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		X			
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV		7	Х				
8a	Enter the states to which the foundation reports or with which it is registered (see instructions)							
	NJ							
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		X			
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3)							
	or 4942(j)(5) for calendar year 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? If							
40	"Yes," complete Part XIV		9	<u> </u>	X			
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses .	r	. 10					
	maines and addresses .	<u> </u>	· 1 10	- 	Ь			

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		Yes	No
•	meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		<u> </u>
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		¥
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	X
13	Website address	13		
14	The books are in care of ► Luis Tellez Telephone no ► (732) 600	0-373	3	
	Located at ► 16 Stockton Street Princeton NJ ZIP+4 ► 08540			
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	,		
16	At any time during calendar year 2016, did the foundation have an interest in or a signature or other authority		Yes	No
	over a bank, securities, or other financial account in a foreign country?	16		<u> </u>
	See the instructions for exceptions and filing requirements for FinCEN Form 114 If			
Do-d	"Yes," enter the name of the foreign country			
Part	VII-B Statements Regarding Activities for Which Form 4720 May Be Required		Vaa	N ₂
4-	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		Yes	No
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? Yes X No. (2) Parsey many from land many to as otherwise system and the (as assent to form) a			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? Yes X No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes X 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)?			
	(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)			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in	<u> </u>		
	Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	1b	N/A	L
	Organizations relying on a current notice regarding disaster assistance check here			
С	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that	ا ا		
_	were not corrected before the first day of the tax year beginning in 2016?	1c		<u> </u>
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))	ĺ		
а	At the end of tax year 2016, did the foundation have any undistributed income (lines 6d and	 		<u> </u>
-	6e, Part XIII) for tax year(s) beginning before 2016? Yes X No			
	If "Yes," list the years 20 , 20 , 20 , 20	1		1
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2)	l	[ļ
	(relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to			ĺ
	all years listed, answer "No" and attach statement—see instructions)	2b	N/A	<u> </u>
C	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here	1		
•	► 20, 20, 20]	1]
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Yes X No	l		1
				!
ь	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	l		
	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	N/A	1
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		Х
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its			<u> </u>
	charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2016?	4b		<u> x</u>

Part	VII-B	Statements Regarding Activities	for Wh	ich Form 4	1720 N	lay Be Re	quirec	l (contin	ued)			
5a		e year did the foundation pay or incur any on propaganda, or otherwise attempt to in			section	4945(e))?		Yes	X No			
		nce the outcome of any specific public ele ly or indirectly, any voter registration drive		ee section 49	955), or	to carry on	•	Yes	X No		:	
	(3) Provid	de a grant to an individual for travel, study,	, or othe	r sımılar purp	oses?			Yes	X No			;
		de a grant to an organization other than a on 4945(d)(4)(A)? (see instructions)	charıtab	ole, etc , orga	nızatıor	n described	ın	☐ Yes	X No			1
		de for any purpose other than religious, ch ises, or for the prevention of cruelty to chil			егагу, с	or education	nal	Yes	X No			,
b	-	swer is "Yes" to 5a(1)–(5), did any of the trons section 53 4945 or in a current notice i		-	-		-		d in	5b	N/A	
С	Organiza	tions relying on a current notice regarding wer is "Yes" to question 5a(4), does the fo it maintained expenditure responsibility fo	disaste oundatio	r assistance n claim exen	check h	nere .		Yes	► □ □ No			
6a	Did the fo	attach the statement required by Regulation bundation, during the year, receive any fur sonal benefit contract?	ons section 53.4945–5(d) nds, directly or indirectly, to pay premiums			⊠ No						
b		oundation, during the year, pay premiums, o 6b, file Form 8870	directly	or indirectly,	on a p	ersonal ben	efit con	tract?		6b		X
7a		e during the tax year, was the foundation a pa						Yes	X No			
b		did the foundation receive any proceeds of							- 1 d	7b	N/A	
Part		Information About Officers, Directors and Contractors	ors, iri	ustees, ro	undati	on Manag	jers, n	lignly P	aid Em	ipioye	es,	
1		fficers, directors, trustees, foundation r	manage	rs and their	compe	nsation (s	ee instr	ructions)				
- :		(a) Name and address	(b) Title hours	, and average s per week ed to position	(c) Co (if r	mpensation not paid, iter -0-)	(d) emplo	Contribution byee benefit erred compe	s to plans		nse acc allowan	
See A	ttached St	atement				ĺ						
		· · · · · · · · · · · · · · · · · · ·		00		0					· · · · · ·	
				00		0						
·				00		0						
				00		0						
2	Compen	sation of five highest-paid employees (other th		cluded	on line 1—	see ins	struction	s). If no	ne, en	er	
	(a) Name a	(a) Name and address of each employee paid more than \$50,000		(b) Title, and a hours per w devoted to po	eek	(c) Comper	isation	(d) Contrib employee plans and compen	benefit deferred		ense acc allowan	
NONE												
						· ·						
						· - ··· · · · ·					· · · <u>-</u> ·	
		•••••										
Total	number of	other employees paid over \$50,000				l			•	-	_	0

Form 990-PF (2016)

Par	t VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid En and Contractors (continued)	nployees,
٠ 3	Five highest-paid independent contractors for professional services (see instructions). If none, enter "NON	IE."
	(a) Name and address of each person paid more than \$50,000 (b) Type of service	(c) Compensation
NON	E	
-		
		
		ļ
Total	number of others receiving over \$50,000 for professional services	
		L
Pa	t IX-A Summary of Direct Charitable Activities	
List	the foundation's four largest direct chantable activities during the tax year. Include relevant statistical information such as the number of	5
org	anizations and other beneficianes served, conferences convened, research papers produced, etc	Expenses
	Grants for projects that educate young men and woman in the Western intellectual tradition. Total amount	
	of grants awarded to 14 receipients	
		748,900
2		į
3		
Э.		
•		
4		
Pa	rt IX-B Summary of Program-Related Investments (see instructions)	·
	scribe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	Total program expenses for the creation of various Centers of Excellence near or within elite Universities.	ļ
,		4.000
•		4,690
2		
All	other program-related investments. See instructions	
3		
		}
Tota	I. Add lines 1 through 3	4,690

Form **990-PF** (2016)

Form 990-PF (2016)

Part		n founda	tions,
	see instructions.)	,	
٠ 1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc.,		
	purposes		
а	Average monthly fair market value of securities	1a	1,155,053
b	Average of monthly cash balances	1b	1,512,847
С	Fair market value of all other assets (see instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	2,667,900
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation)		
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	2,667,900
4	Cash deemed held for charitable activities Enter 1½ % of line 3 (for greater amount, see		
	instructions)	4	40,019
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	2,627,881
6	Minimum investment return. Enter 5% of line 5	6	131,394
Part			
	foundations and certain foreign organizations check here and do not complete this part)		
1	Minimum investment return from Part X, line 6	1	131,394
2a	Tax on investment income for 2016 from Part VI, line 5 2a 4,491	<u>u</u> (
b	Income tax for 2016 (This does not include the tax from Part VI) . 2b	<u>_</u>	
C	Add lines 2a and 2b .	2c	4,491
3	Distributable amount before adjustments Subtract line 2c from line 1	3	126,903
4	Recoveries of amounts treated as qualifying distributions .	4	
5	Add lines 3 and 4	5	126,903
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_	126,903
Dart	XII Qualifying Distributions (see instructions)		
r all t	All Qualitying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
а	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26	1a	748,900
b	Program-related investments—total from Part IX-B	1b	4,690
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		
а	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	753,590
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	
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	753,590
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whe	ther the fo	
	qualifies for the section 4940(e) reduction of tax in those years		

a Excess from 2012		All Chaistibatea moonie (see maaacie		(L)	7.	
Ime 7 Im	4	Distributable amount for 2016 from Part VI				
2 Undistributed income, if any, as of the end of 2016 a Enter amount for 2015 only b Total for proxy years 20 20 20 5 Excess distributions carryover, if any, to 2016 a From 2011 b From 2013 c From 2013 c From 2015 f Total of lines 3a through e	•			, p.,	 -	
a Enter amount for 2015 only b Total for prory years 20 20 20 5 Excess distributions carryover, if any, to 2016 a From 2011 b From 2012 c From 2013 f From 2014 b From 2014 c From 2014 c From 2014 c From 2015 a Papiled to 2016, but not more than line 2a b Appiled to undistributed mome of prory years (Election required—see instructions) d Appiled to 2016, but not more than line 2a b Appiled to distributions or 2016 from Part XIII, tine 4 b S 753,590 a Appiled to 2016, but not more than line 2a b Appiled to distributions or common of prory years (Election required—see instructions) d Appiled to 2016 distributable amount on Remaining amount distributed out of corpus Excess distributions carryover appiled to 2016 (If an amount appears in column (a)) e Enter the nat total of each column as indicated below. C Corpus Add lines 3f, 4c, and 4e Subtract line 5 b Prory years' undistributed mome Subtract line 4b from line 2b c Enter the amount of prory years undistributed momen 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 Undistributed momen for 2016 Subtract line 4 from line 2a Taxable amount—see instructions Undistributed momen for 2015 Subtract line 4 from line 1 This amount must be distributed momen for his amount must be distributed momen for the section 4942(a) tax has been previously assessed d Subtract line 6c from line 6b Taxable amount—see instructions Undistributed momen for 2016 Subtract line 4 from line 1 This amount must be distributed momen for the section 4942(a) tax has been several as distributions carryover from 2011 not applied on line 5 or line 7 (see instructions) Excess fishablions carryover from 2011 not applied on line 5 or line 7 (see instructions) Excess from 2015	•					126,903
b Total for pror years 20 _ 20 _ 20						
3. Excess distributions carryover, if any, to 2016 a From 2012 c From 2013 c From 2014 e From 2014 e From 2014 e From 2015 o Total of lines 3a through e Qualifying distributions for 2016 from Part XII, line 4 P S 753,590 a Applied to 2015, but not more than line 2a b Applied to 2015, but not more than line 2a 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 experiment anyone in a column (a), the same amount must be shown in column (b), the same amount must be shown in column (a). Einter 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 from line 2b c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or or which the section 4942(a) tax has been previously assessed d Subtract line 6c from line 6b Taxable amount—see instructions undistributed income for 2015. Subtract line 4a from line 2a Taxable amount—see instructions Undistributed income for 2016. Subtract line 4a from line 2a Taxable amount—see instructions Undistributed income for 2016. Subtract line 4a from line 2a Taxable amount—see instructions Undistributed income for 2016. Subtract line 4a from line 2a Taxable amount—see instructions Undistributed income for 2016. Subtract line 4a from line 2a Taxable amount—see instructions Excess distributions carryover from 2011. Subtract line 8c from line 6b Taxable amount—see instructions Excess from 2016. Subtract line 4a from line 5a Taxable amount—see instructions Excess from 2015. Excess from 2016. Excess from 2	-		 		<u> </u>	
a From 2011 b From 2012 c From 2013 d From 2015 f Total of lines 3a through e Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ 753,590 a Applied to 2015, but not more than line 2a b Applied to undistributed income of prior years (Election required—see instructions) d Applied to 2016 distributable amount e Remaining amount distributed out of corpus 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 Pror years' undistributed income Subtract line 4 brom 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 3 Subtract line 6 trom line 6b Taxable amount—see instructions Undistributed income for 2015 Subtract line 4 from line 2a Taxable amount—see instructions Undistributed income for 2015 Subtract line 4 from line 2a Taxable amount—see instructions Undistributed income for 2015 Subtract line 4 from line 2a Taxable amount—see instructions Excess distributions carryover from 2011 not applied on line 5 or line 7 (see instructions) Excess distribution carryover from 2017. Subtract lines 7 and 8 from line 6a Excess from 2012 Excess from 2014 Excess from 2015 Excess from 2016		· · · — — —	. 			
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c From 2014 d From 2014 f From 2015 f Total of lines 3a through e Qualifying distributions for 2016 from Part XII, line 4	_		_			
d From 2015 Total of lines 3a through e Qualifying distributions for 2016 from Part XII, line 4 * * \$ 755,580 a Applied to 2015, but not more than line 2a b Applied to 2015, but not more than line 2a Clection required—see instructions) I reated as distributions out of corpus (Election required—see instructions) d Applied to 2016 distributable amount Remaining amount distributed out of corpus Excess distributions carryover applied to 2016 (If an amount appears in column (a), the same amount must be shown in column (a)) Enter the net total of each column as indicated below: a Corpus Add lines 3f, 40, and 4e Subtract line 5 b Prior years' undistributed income Subtract line 4 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 Undistributed income for 2015 Subtract line 4 from line 2a Taxable amount—see instructions Undistributed income for 2016. Subtract line 4 from line 2a Taxable amount—see instructions Undistributed income for 2016. Subtract line 4 from line 2a Taxable amount—see instructions Excess distributions carryover from 2011 not applied on line 5 or line 7 (see instructions) Excess distributions carryover from 2011. Subtract lines 4 from line 1 This amount must be distributions carryover from 2011 not applied on line 5 or line 7 (see instructions) Excess distributions carryover from 2011. Subtract lines 4 from line 5 or line 7 (see instructions) Excess distributions carryover from 2017. Subtract lines 7 Analysis of line 9 Excess from 2016. Excess	b					
e From 2015	С					
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4. Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ 753,590 a Applied to 2015, but not more than line 2a 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 e Remaining amount distributed out of corpus Excess distributions carryover applied to 2016. (If an amount appears in column (d), the same amount must be shown in column (a)) Enter the net total of each column as indicated below: a Corpus Add lines 31, 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 9492(a) tax has been previously assessed d Subtract line 6c from line 6b Taxable amount—see instructions Undistributed income for 2015. Subtract line 4a from line 2a Taxable amount—see instructions Undistributed income for 2016. Subtract line 4a from line 2a Taxable amount—see instructions Add and 5 from line 1 This amount must be distributed in notice for 2016. Subtract line 4a from line 2a Taxable amount—see instructions Excess distributions carryover from 2011 not applied on line 5 or line 7 (see instructions) Excess from 2017. 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) Excess from 2016. Excess from 2013. Excess from 2014. Excess from 2015.	е	From 2015				
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e Excess from 2016 . 626,687		5	7)		
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Part:	XIV Private Operating Foundati	ions (see instru	ctions and Part \	/II-A, question 9)		N/A
1a	If the foundation has received a ruling o	r determination let	ter that it is a priva	te operating		
•	foundation, and the ruling is effective for	2016, enter the d	ate of the ruling	•		
b	Check box to indicate whether the foundation	n is a private opera	ting foundation desci	ribed in section	4942(j)(3) or 4942(j)(5)
2a	Enter the lesser of the adjusted net	Tax year		Prior 3 years		
	income from Part I or the minimum	(a) 2016	(b) 2015	(c) 2014	(d) 2013	(e) Total
	investment return from Part X for each year listed		- (3, - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 	,,,, =================================		0
ь	85% of line 2a		 			0
c	Qualifying distributions from Part XII,		 			
·	line 4 for each year listed					0
d	Amounts included in line 2c not used directly			-		
u	for active conduct of exempt activities .					0
е	Qualifying distributions made directly					
C	for active conduct of exempt activities			j		
	Subtract line 2d from line 2c					0
3	Complete 3a, b, or c for the					
3	alternative test relied upon					
а	"Assets" alternative test—enter		į			
a	(1) Value of all assets					0
	(2) Value of assets qualifying under			<u> </u>		
	section 4942(j)(3)(B)(i)					o
b	"Endowment" alternative test—enter 2/3		 	 		
_	of minimum investment return shown in					0
_	Part X, line 6 for each year listed .		 	 		
С	"Support" alternative test—enter					
	(1) Total support other than gross investment income (interest,		-			
	dividends, rents, payments on					
	securities loans (section			1		
	512(a)(5)), or royalties) (2) Support from general public		 			0
	and 5 or more exempt					
	organizations as provided in					
	section 4942(j)(3)(B)(III)		 	 		0
	(3) Largest amount of support from					
	an exempt organization		 -			0
Part	(4) Gross investment income XV Supplementary Information	n /Complete thi	io nort only if th	a foundation be	d 65 000 as ma	0
rart	any time during the year—			e roundation na	a \$5,000 or mo	re in assets at
1	Information Regarding Foundation M		3./			
' ء	List any managers of the foundation wh		d more than 2% of	the total contribution	ns received by the	foundation
a	before the close of any tax year (but on					Touridation
	Belefo the close of any tax your (but on	, ii (110) 11010 0011		40,000) (000 000	0,, 00, (0,(=, ,	
	List any managers of the foundation wh	0 0W0 10% or mo	re of the stock of a	corporation (or an	agually large portio	on of the
J	ownership of a partnership or other enti					in or the
	ownership of a paranetering of earler erra	()) 01 11/11011 (10 10	andalion nas a 107	o or greater interes	•	
2	Information Regarding Contribution,	Grant Gift Loan	Scholarshin etc	Programs:		
-	Check here ► 🖾 if the foundation or				ations and does n	nt accent
	unsolicited requests for funds. If the four	ndation makes oif	ts. grants, etc. (see	e instructions) to inc	ividuals or organiz	ations
	under other conditions, complete items	-	, 3	· · · · · · · · · · · · · · · · · · ·	· · · · · · · · · · · · · · · · · · ·	
	The name, address, and telephone nun	her or e-mail add	ress of the nerson	to whom application	s should be addre	essed
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	The form in which applications should b	e submitted and ii	oformation and ma	terials they should i	nclude	
U	The form in which applications should be	e subilitted and ii	normation and ma	terials triey should i	IIGIGGE	
	Any submission deadlines					
	Any submission deadlines.					
d	Any restrictions or limitations on awards	s, such as by geog	raphical areas, cha	aritable fields, kinds	of institutions, or	other
	factors					

Part XV Supplementary Information (continued)

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a Paid during the year Margarita Mooney Margarita Mooney None I Research 11, 12 Edgehill Street Princeton, NJ 08540 American Public Philosophy Institute 1845 E Northgate Drive Balfas, TX 75235 University of Pennsylvania 3451 Walnut Street Philadelphia, PA 19104 Hyde Park Institute 5500 S Woodlawn Avenue Chicago, IL 60637 ISPPR 20 Derby Street Cambridge CB3 9JE United Kingdom (England, Northe Houston Institute PO Box 53687 Houston, TX 77052 Houston, TX 77052 Austin Institute for the Study of Family & Culture Austin, TX 78701 The Elm Institute 129 Church Street New Haven, CT 06510 The Abigal Adams Institute 85 Brattle Street Cambridge, MA 02138 Zephyr Institute PC Research 131, 560 College Avenue Palo Alto, CA 94306 Collegium Institute PC Research 150, Research 1		any foundation manager			Amount
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129 Church Street New Haven, CT 06510 The Abigail Adams Institute 85 Brattle Street Cambridge, MA 02138 Zephyr Institute PC Research 131, 560 College Avenue Palo Alto, CA 94306 Collegium Institute PC Research 50, Total . See Attached Statement PC Research 140, PC Research 50, 151, 152, 153, 154, 155, 165, 175, 185, 185, 196, 197, 198	Austin, TX 78701				
New Haven, CT 06510 PC Research 100, 85 Brattle Street Cambridge, MA 02138 PC Research 131, Zephyr Institute PC Research 131, 560 College Avenue Palo Alto, CA 94306 PC Research 50, Collegium Institute PC Research 50, 264 Montgomery Avenue PA 19401 PA 19401 PA 748,			PC	Research	75,000
The Abigail Adams Institute 85 Brattle Street Cambridge, MA 02138 Zephyr Institute PC Research 100, 85 Brattle Street Cambridge, MA 02138 Zephyr Institute PC Research 131, 660 College Avenue Palo Alto, CA 94306 Collegium Institute PC Research 50, 85 Brattle Street PC Research 50, 86 Brattle Street See Attached Statement PC Research 50, 87 Brattle Street See Attached Statement PC Research 50, 86 Brattle Street See Attached Statement PC Research 100, 100, 100, 100, 100, 100, 100, 100				}	
85 Brattle Street Cambridge, MA 02138 Zephyr Institute PC Research 131, 560 College Avenue Palo Alto, CA 94306 Collegium Institute PC Research 50, 264 Montgomery Avenue Haverford, PA 19401 Total See Attached Statement > 3a 748,					
Cambridge, MA 02138 Zephyr Institute FC Research 131, 560 College Avenue Palo Alto, CA 94306 Collegium Institute PC Research 50, Collegium Institute PC Research 50, Total . See Attached Statement			PC	Research	100,000
Zephyr Institute FC Research 131, 560 College Avenue Palo Alto, CA 94306 Collegium Institute PC Research 50, 40, 41, 50, 50, 50, 50, Total . See Attached Statement See Attached Statement PC Research 50, 41, 50, 50, 50, 50, 50, 50, 50, 5			ľ		
560 College Avenue Palo Alto, CA 94306 Collegium Institute PC Research 50. 264 Montgomery Avenue Haverford, PA 19401 Total See Attached Statement **Total** See Attached Statement	=			Bassast	404.000
Palo Alto, CA 94306 Collegium Institute 264 Montgomery Avenue Haverford, PA 19401 Total . See Attached Statement PC Research 50,			PC	Research	131,000
Collegium Institute PC Research 50. 264 Montgomery Avenue Haverford, PA 19401 Total . See Attached Statement • 3a 748,			1		1
264 Montgomery Avenue Haverford, PA 19401 Total . See Attached Statement ▶ 3a 748,			DC	Basasah	50,000
Haverford, PA 19401 Name Name<			PC	Research	50,000
Total . See Attached Statement ▶ 3a 748,					
		<u> </u>	<u> </u>	▶ 3a	748,900
			· · · · ·		740,900
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Total	Total		L	D 2h	

Pa	rť XV	I-A Analysis of Income-Producing Ac	tivities				
		ss amounts unless otherwise indicated		isiness income	Excluded by sect	on 512, 513, or 514	
•	-		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	(e) Related or exempt function income (See instructions)
1	_	ram service revenue	ļ				
	a _			<u> </u>			
					-		
				<u> </u>		.	
	u_				-		
	f -				 		
	g F	Fees and contracts from government agencies					
2	_	bership dues and assessments	•				
3		est on savings and temporary cash investments					
4		dends and interest from securities			14	23,943	
5	Net	rental income or (loss) from real estate					
	a l	Debt-financed property					
	b I	Not debt-financed property					
6		rental income or (loss) from personal property					
7		er investment income					
8		or (loss) from sales of assets other than inventory			18	212,396	
9		income or (loss) from special events					
10		ss profit or (loss) from sales of inventory			10	0.070	
11		er revenue a <u>Unrealized Loss on Investment</u>	<u> </u>		18	-2,979	
	b _						
	c _ d						
	e -						
12	_	total Add columns (b), (d), and (e)		0		233,360	0
13		il. Add line 12, columns (b), (d), and (e)	L			13	233,360
(Se		sheet in line 13 instructions to verify calculations	;)			.	
Pa	rt XV	I-B Relationship of Activities to the A	ccomplishm	ent of Exemp	t Purposes		
Lin	e No. ▼	Explain below how each activity for which incom accomplishment of the foundation's exempt purp	poses (other than				
	4	Interest and dividend income used for grants av					
	8	Capital gains increase amounts available for gr					
	11	Capital Losses decrease the amount available	for grant award	<u>s</u>		·	
				<u> </u>			
			•	•			
				<u>-</u>			
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_				<u>. </u>			
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Part	XVII	Information Exempt Org	Regarding T	ransfers	To and Trans	action	s and Re	lationship	s Wit	h Noi	ncharita	ble		,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,
•1	ın sed	ne organization di ction 501(c) of the cal organizations	rectly or indirect of the code (other the		•	_	•	_			d		Yes	No
а	•	sfers from the rep		n to a nond	charitable exem	pt organ	ization of				. 1	a(1)		X
b	(2) 0	ther assets .									. [1	a(2)	~	X
	(2) P	ales of assets to a urchases of asse	ts from a nonch	aritable ex	empt organizati	on .					1	b(1) b(2)		X
	(4) R	ental of facilities, eimbursement ar	rangements	other assets	8						1	b(3) b(4)		X X
С	(6) P	oans or loan guar erformance of se ng of facilities, ed	rvices or memb	•	-		vees				1	b(5) b(6) 1c		X
d	If the value	answer to any of the of the goods, other in any transaction	he above is "Yes er assets, or servi	" complete to ces given b	the following sch y the reporting fo	edule. Co undation	olumn (b) sl	dation receiv	ed less	than fa	market air market			
(a) Line		(b) Amount involved		·	e exempt organization			emption of transf					gemen	ts
	\dashv													
	4													
							 							
	_						 							
				 			 							
			<u> </u>				 							
							 							
			 				 						_	
	-+					 -	 							
2a b	desc	e foundation direction 5 s," complete the	01(c) of the Cod	de (other th	th, or related to an section 501(, one or c)(3)) or	more tax-e in section	xempt orga 527?	nızatıo	ns		es [X N	 IO
		(a) Name of organ	ization		(b) Type of or	ganization			(c) De	scription	of relations	ıp		
														
														
	Linda	- analyse of name. I doe	land that I have a compar	d this estimation in the	udun nasamana ad	adulas and		to the best of my l	-naudodao	and bala	Lutus taus			
Sian		r penalties of perjury, I dec ct, and complete Declarati							arowieuge		May the IRS o		bio roti	_
Sign Here	Sign	nature of officer or trus	E Tella		3-111- / 7 Date	Tru	ustee			- 1	with the prepa	rer sh <u>ov</u>	vn bela	<u>~</u>
Paid	ror	Print/Type preparer's Douglas Ziegler		PA	eparens signature	_	>	Date 2/25/20	017		X if	IN 00035	054	
Prepa Use C		Firm's name	Douglas Ziegle						Firm's	EIN 🕨	45-3985			
		Firm's address	1 Airport Place	, Ste 3, Pri	nceton, NJ 085	40			Phone	no	(732) 60 Forr			(2016)

Schedule B

(Form 990, 990-EZ, or 990-PF)

Department of the Treasury Internal Revenue Service

Name of the organization

Schedule of Contributors

► Attach to Form 990, Form 990-EZ, or Form 990-PF.

Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990.

OMB No 1545-0047

2016

Employer identification number

The Foundation for Excellent	e in Higher Education Inc		46-1439784				
Organization type (check or	e)						
Filers of:	Section:						
Form 990 or 990-EZ	501(c)() (enter number) org	ganization					
	4947(a)(1) nonexempt charitable to	rust not treated as a private foundation					
	527 political organization						
Form 990-PF	X 501(c)(3) exempt private foundation	n					
	4947(a)(1) nonexempt charitable to	rust treated as a private foundation					
	501(c)(3) taxable private foundation	n					
							
	covered by the General Rule or a Special I), (8), or (10) organization can check boxes		Rule See				
General Rule							
	ling Form 990, 990-EZ, or 990-PF that rece property) from any one contributor Comple tributions						
Special Rules							
regulations under se 13, 16a, or 16b, and	escribed in section 501(c)(3) filing Form 99 ctions 509(a)(1) and 170(b)(1)(A)(vi), that clithat received from any one contributor, durine amount on (i) Form 990, Part VIII, line 18	hecked Schedule A (Form 990 or 990-EZ ng the year, total contributions of the grea), Part II, line ater of (1)				
contributor, during th	lescribed in section 501(c)(7), (8), or (10) file year, total contributions of more than \$1,0 all purposes, or for the prevention of cruelty	000 exclusively for religious, charitable, so	cientific,				
contributor, during th contributions totaled during the year for a General Rule applie	For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions exclusively for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an exclusively religious, charitable, etc., purpose. Don't complete any of the parts unless the General Rule applies to this organization because it received nonexclusively religious, charitable, etc., contributions totaling \$5,000 or more during the year.						
Caution: An organization tha	t isn't covered by the General Rule and/or t	he Special Rules doesn't file Schedule B	(Form 990				

990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Name of organization
The Foundation for Excellence in Higher Education Inc.

Employer identification number

46-1439784 Part I Contributors (See instructions). Use duplicate copies of Part I if additional space is needed. (b) (a) (c) (d) No. Name, address, and ZIP + 4 **Total contributions** Type of contribution Peter Brinckerhoft Person __1__ 291 Sabal Palm Lane **Payroll** Vero Beach FL 32963 Noncash Foreign State or Province (Complete Part II for Foreign Country noncash contributions) (b) (a) (c) (d) No. Name, address, and ZIP + 4 **Total contributions** Type of contribution Charles Johnson 2 Person 703 Island Drive **Payroll** Noncash Palm Beach FL 33480 \$ 1,011,920 Foreign State or Province (Complete Part II for Foreign Country noncash contributions) (b) (a) (c) (d) No. Name, address, and ZIP + 4 **Total contributions** Type of contribution Person **Payroll** Noncash Foreign State or Province (Complete Part II for Foreign Country noncash contributions) (a) (b) (c) (d) No. Name, address, and ZIP + 4 **Total contributions** Type of contribution Person Payroll Noncash Foreign State or Province (Complete Part II for Foreign Country noncash contributions) (b) (a) (c) (d) Name, address, and ZIP + 4 **Total contributions** No. Type of contribution Person Payroll Noncash Foreign State or Province (Complete Part I) for Foreign Country noncash contributions) (a) (b) (c) (d) No. Name, address, and ZIP + 4 **Total contributions** Type of contribution Person **Payroll** Noncash Foreign State or Province (Complete Part II for Foreign Country noncash contributions)

Name of organization
The Foundation for Excellence in Higher Education Inc
Employer identification number
46-1439784

Part II	Noncash Property (See instructions). Use duplicate c	opies of Part II if additional spa	ice is needed
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
2	26000 shares of Franklin Resources Inc	\$1,011,920	11/28/2016
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		\$	

	ganization			Employer identification number			
ne Founda art III	ation for Excellence in Higher Educate Exclusively religious, charitable,		organizations does	46-1439784			
art III	• •		_				
	(10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc.,						
	contributions of \$1,000 or less for						
	Use duplicate copies of Part III if a	•					
a) No.			-				
from Part I	(b) Purpose of gift	(с) Use of gift	(d) Description of how gift is held			
-art i	· · · · · · · · · · · · · · · · · · ·						
		i					
		(e) T	ransfer of gift				
	Transferee's name, addres	s, and ZIP + 4	Relatio	nship of transferor to transferee			
	For Prov Cou	ntrv					
a) No.			<u> </u>				
from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held			
<u> </u>							
	-						
	(e) Transfer of gift						
			D.1.0				
	Transferee's name, addres	s, and ZIP + 4	Relatio	nship of transferor to transferee			
i	For Prov Cou	ntry					
a) No.			\				
from Part I	(b) Purpose of gift	(0) Use of gift	(d) Description of how gift is held			
		(0)	Transfer of wife				
		(e)	ransfer of gift				
	Transferee's name, addres	ss. and ZIP + 4	Relatio	onship of transferor to transferee			
		· · · · · · · · · · · · · · · · · · ·					
-\ NI-	For Prov Cou	ntry					
a) No. from	(b) Purpose of gift	(6	c) Use of gift	(d) Description of how gift is held			
Part I	(5) (5) (5)	``		(-,			
		. (م)	Transfer of gift				
		(6)	or you				
	Transferee's name, addres	ss, and ZIP + 4	Relatio	onship of transferor to transferee			
		·					
	L For Broy	nto.	1				

Part I, Line 6 (990-PF) - Gain/Loss from Sale of Assets Other Than Inventory

The Foundation for Excellence in Higher Education Inc

	•	212,396	0			. <u>.</u> .⊑	S	212.396
Net Gam	or Loss	7				Net Gain	or Loss	2
Š	o						Adjustments	
sis, Expenses,	d Adjustments	4,323,169	0				Depreciation	
Cost or Other Basis, Expenses,	Depreciation and Adjustments				Expense of Sale	and Cost of	Improvements	
- S	Si	4,535,565	0			Valuation	Method	
Gross	Sales					Cost or	Other Basis	4.323.169
Totals		Capital Gains/Losses	Other sales			Gross Sales	Price	4.535.565
		ී				Date	Sold	12/31/2016
						Date	Acquired	1/1/2016
						Acquisition	Method	a
				Check "X" if	Purchaser	ısa	Business	
							Purchaser	
					Check X	to include	in Part IV	×
	Amount	0	0		_		CUSIP#	
		Long Term CG Distributions	Short Term CG Distributions				Description	Various Stock Sales
				ı				ι 🕶

Part I, Line 11 (990-PF) - Other Income

	-2,979	-2,979	0
	Revenue		
	and Expenses	Net Investment	Adjusted
Description	per Books	Income	Net Income
Unrealized Losses on Investments	-2,979	-2,979	

Part I, Line 16a (990-PF) - Legal Fees

	19,305	0		0
Description	Revenue and Expenses per Books	Net Investment	Adjusted Net	Disbursements for Charitable Purposes (Cash Basis Only)
		Income	Income	(Casil Basis Only)
1 Legal Fees	19,305			<u> </u>

Part I, Line 16b (990-PF) - Accounting Fees

	19,500	0		0 0
				Disbursements
	Revenue and]	for Charitable
	Expenses per	Net Investment	Adjusted Net	Purposes
Description	Books	Income	Income	(Cash Basis Only)
1 Accounting Fees	19,500			0

Part I, Line 16c (990-PF) - Other Professional Fees

		38,794	8,794	0	0
	Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes (Cash Basis Only)
1	Investment Fees	8,794	8,794		0
2	Consulting	30,000			0

Part I, Line 23 (990-PF) - Other Expenses

		<u>5,4</u> 86	0		0
		Revenue and			Disbursements
		Expenses	Net Investment	Adjusted Net	for Charitable
	Description	per Books	Income	Income	Purposes
1_	Office Expenses & Supplies	236	0		
2	insurance	560	0		
3	Program Expenses	4,690	0		
4		0	0		

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Part II, Line 10b (990-PF)

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		1,281,026	1,029,080	1,281,026	1,029,080
	Num Shares/	Book Value	Book Value	FMV	FMV
Description	Face Value	Beg. of Year	End of Year	Beg. of Year	End of Year
1 Vanous Investments		1,281,026	1,029,080	1,281,026	1,029,080

Part VII-A, Line 8b (990-PF) - Copy of Form 990-PF to Attorney General				
Copy is file with State of New Jersey Charities Registration Department in lieu of Attorney General				
•				
				

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Part VII-A, Line 10 (990-PF) - Substantial Contributors

ine roundation for excellence in Higher Education Inc.

_		•	
		Foreign Country	
		Zip Code	
		State	
		City	
		Street	
	Check "X"	if Business	
		Name	See Schedule B

Managers
1 Foundation
Trustees and
s, Directors,
of Officers
npensation
-PF) - Cor
Line 1 (990
Part VIII,

The Foundation for Excellence in Higher Education Inc

Expense	Account •									_	_		
	Benefits					_			· -				
	Compensation	0		0		0		0		0			0
Avg Hrs	Per Week	1 00		1.00		1 00	-	2 00		1 00			100
	Title	Chairman		Secretary		President		Asst Treasure	-	Director	_		Nice Vice
	Foreign Country												
	Zıp Code	08540		08540		08540		08540		08540			08540
	State	2		2		2		3		3			3
	City	Princeton		Princeton		Princeton		Princeton		Princeton			Princeton
	Street	16 Stockton Street		16 Stockton Street		16 Stockton Street		16 Stockton Street		16 Stockton Street			16 Stockton Street
Check "X"	if Business												
	Nаme	Joseph J Frank		John M. Metzger	2	Luz E Tellez	· ·	John Doherty	4	Patnck Hough	_	-	William P Mumma
L			_	1	~	l	(**)	l	4	ı		٠.	۱,۰۰

Elections

Treatment of Qualifying Distributions Election

Pursuant to IRC Section 4942(h)(2) and Reg 53 4942(a)-3(d)(2), the Foundation elects to treat qualifying distributions not treated as made out of the undistributed income of the immediately preceding tax year, as made out of Corpus

Officer Signature

President Title