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# Form 990-PF Department of the Treasury Internal Revenue Service

**Return of Private Foundation** 

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

▶ 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.

OMB No 1545-0052

2016

Open to Public Inspection

For calendar year 2016 or tax year beginning	. <u></u>	, and ending		
Name of foundation			A Employer identification	number
CHARLES AND MITCH OTA FOU			46-3255584	
Number and street (or P O box number if mail is not delivered to stre	et address)	Room/suite	B Telephone number	
368 LEHUAKONA STREET			808-871-54	59
City or town, state or province, country, and ZIP or foreign	postal code		C If exemption application is per	nding check here
KAHULUI, HI 96732		<del></del>	-\	
G Check all that apply: Initial return	Initial return of a fo	rmer public charity	<b>D</b> 1. Foreign organizations,	check here
Address change	Amended return  Name change		Foreign organizations mee check here and attach con	ting the 85% test,
	exempt private foundation		7	_
Section 4947(a)(1) nonexempt charitable trust	Other taxable private founda	tion	E If private foundation state under section 507(b)(1)(	
	nting method: X Cash	Accrual	F If the foundation is in a 6	•
\ <del></del>	Other (specify)		under section 507(b)(1)(	
▶\$ (Part I, co	lumn (d) must be on cash b	asis)	<u> </u>	
Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not	(a) Revenue and	(b) Net investment	(c) Adjusted net	(d) Disbursements for charitable purposes
necessarily equal the amounts in column (a) )	expenses per books	ıncome	income	(cash basis only)
1 Contributions, gifts, grants, etc., received			<del>  </del>	_ <del></del>
2 Check \( \sum \sum \sum \sum \sum \sum \sum \sum			<del> </del>	
cash investments			<del> </del>	
4 Dividends and interest from securities		<del>, , , , , , , , , , , , , , , , , , , </del>	<del> </del>	
5a Gross rents		<del></del>	<del> </del>	<del></del>
h Net rental income or (loss)				<del></del>
6a Net gain or (loss) from sale of assets not on line 10 Gross sales price for all			T	<del></del>
Gross sales price for all assets on line 6a  7 Capital gain net income (from Part IV, line 2)		0	•	
8 Net short-term capital gain				
9 Income modifications				
Gross sales less returns 10a and allowances				
<b>b</b> Less Cost of goods sold		·		
c Gross profit or (loss)				
11 Other income				
12 Total Add lines 1 through 11	0.	0	0.	
13 Compensation of officers, directors trustees, etc	0.	0	0.	0
<ul><li>14 Other employee salaries and wages</li><li>15 Pension plans, employee benefits</li></ul>		<del></del>	+	
			+	
b Accounting fees				
c Other professional fees				
b Accounting fees c Other professional fees 17 Interest RECEIVED 18 Taxes 19 Depreciation and depletion 2017				
T 18 Taxes				
b Accounting fees c Other professional fees 17 Interest RECEVED 18 Taxes 19 Deprecation and depletion 20 Occupancy FEB 2017 21 Travel, conferences, and meetings 22 Printing and policial field.				
E 20 Occupated FEB 1 0 2017			<u> </u>	
Y 21 Travel, conferences, and meetings				
			<del></del>	<del>-</del>
23 Other expenses	<del></del>	<del></del>	<del> </del>	
23 Other expenses 24 Total operating and administrative expenses Add lines 13 through 23	0.	0		
expenses Add lines 13 through 23	0.	0	•	0
25 Contributions, gifts, grants paid 26 Total expenses and disbursements	<del>-</del>		<del> </del>	0
26 Total expenses and disbursements Add lines 24 and 25	0.	0	. 0.	0
27 Subtract line 26 from line 12:	<del> </del>		<u>-</u>	<u> </u>
a Excess of revenue over expenses and disbursements	0.			
b Net investment income (if negative enter -0-)		0	•	
c Adjusted net income (if negative enter -0-)			0.	
623501 11-23-16 LHA For Paperwork Reduction Act No	tice, see instructions	aux		Form <b>990-PF</b> (2016

		0-PF(2016) CHARLES AND MITCH OTA F			3255584 Page 2
P	art	Balance Sheets Attached schedules and amounts in the description column should be for end-of year amounts only	Beginning of year (a) Book Value	End o	(c) Fair Market Value
_		Cash - non-interest-bearing	(a) book value	(b) DOOK Value	(c) rail ividi ket value
		Savings and temporary cash investments		<del></del>	
		Accounts receivable		<del></del>	
ĺ		Less: allowance for doubtful accounts			
ĺ	A	Pledges receivable ►		· <del>-</del>	
	Ì	Less: allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other			
		disqualified persons			
	7	Other notes and loans receivable			
		Less: allowance for doubtful accounts ▶			
2	8	Inventories for sale or use			
Assets	9	Prepaid expenses and deferred charges			
Ä	10a	Investments - U.S. and state government obligations			
	Ь	Investments - corporate stock			
	C	Investments - corporate bonds			
	11	Investments land buildings and equipment basis			
		Less accumulated depreciation			
	12	Investments - mortgage loans		- <del></del>	
	13	Investments - other			
	14	Land, buildings, and equipment: basis			
		Less accumulated depreciation			
		Other assets (describe )	<del></del>		
	16	Total assets (to be completed by all filers - see the		•	
_	-	instructions Also, see page 1, item ()	0.	0.	0.
	17		<del></del>		1
	18	Grants payable	<del></del>		
Liabilities	19	Deferred revenue			
Ē	20	Loans from officers directors trustees and other disqualified persons			
Ë	21	Mortgages and other notes payable  Other liabilities (describe		<del></del>	1
	22	Other liabilities (describe			
	23	Total liabilities (add lines 17 through 22)	0.	0.	
_	20	Foundations that follow SFAS 117, check here			
		and complete lines 24 through 26 and lines 30 and 31			
es	24	Unrestricted			
Fund Balances	25	Temporarily restricted			
Bal	26	Permanently restricted			
pu		Foundations that do not follow SFAS 117, check here			]
덒		and complete lines 27 through 31			
sor	27	Capital stock, trust principal, or current funds	0.	0.	
Assets	28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
t As	29	Retained earnings, accumulated income, endowment, or other funds	0.	<u> </u>	<b>-1</b>
Net	30	Total net assets or fund balances	0.	0.	
	}		]	_	
_	31	Total liabilities and net assets/fund balances	0.	0.	<u> </u>
P	art	III Analysis of Changes in Net Assets or Fund E	Balances		
-	Tota	I net assets or fund balances at beginning of year - Part II, column (a), line	30		T
'		st agree with end-of-year figure reported on prior year's return)	, 00	1	0.
2		or amount from Part I, line 27a		1 2	0.
		er increases not included in line 2 (itemize)		3	0.
4		lines 1, 2, and 3			0.
-		reases not included in line 2 (itemize)		5	0.
-		I net assets or fund balances at end of year (line 4 minus line 5) - Part II, o	column (b), line 30	6	0.
<u>-</u>					Form <b>990-PF</b> (2016)

Form 990-PF (2016) CHA Part IV Capital Gains	RLES AND MITCH O and Losses for Tax on In	TA FOU	NDATION		46-3	255584	Page 3
(a) List and desc	cribe the kind(s) of property sold (e.g. arehouse; or common stock, 200 shs	, real estate,	. moonie	(b) How acquired P - Purchase D - Donation	(c) Date acquir (mo., day, yr.		
1a				- Bonation			
b NO	NE						
<u>c</u>							
<u>d</u>							
<u>e</u>	(6) Degradation allowed	(=) C=		<u> </u>	420		
(e) Gross sales price	(f) Depreciation allowed (or allowable)		st or other basis expense of sale		(h) Gain or (e) plus (f) m		
<u>a</u>			<u> </u>			<del></del> _	
<u>b</u>							
d							
<u>e</u>							
	ng gain in column (h) and owned by	the foundation	on 12/31/69		(I) Gains (Col. (h		
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69		cess of col. (1) col. (j), if any	CI	ol. (k), but not les Losses (from		
a	•						
<u>b</u>							
<u>C</u>							
_d			<del></del>				
<u>e</u>							
2 Capital gain net income or (net ca	apıtal loss) $ \begin{cases} & \text{if gain, also enter} \\ & \text{if (loss), enter -0} \end{cases} $	in Part I, line	7	) 2			
, ,	iss) as defined in sections 1222(5) ar		,	/ <del>-</del>			
If gain, also enter in Part I, line 8,	,	iu (0).		\			
If (loss), enter -0- in Part I, line 8	<u> </u>			3			
	Inder Section 4940(e) for				come		
(For optional use by domestic privat	e foundations subject to the section 4	1940(a) tax on	i net investment i	ncome.)			
If section 4940(d)(2) applies, leave t	this part blank.						
Was the foundation liable for the sec	ction 4942 tax on the distributable am	nount of any ve	ear in the hace no	riod2		[ ] Vac	X No
	alify under section 4940(e). Do not co		· · · · · · · · · · · · · · · · · · ·	1104			LZZI NO
	each column for each year; see the in			entries.			
(a) Base period years	(b)			(c)		(d) Distribution ratio	
Calendar year (or tax year beginn	ing in) Adjusted qualifying dis		Net value of ne	oncharitable-use asset	is (col.	b) divided by col	<u>l. (c))</u>
2015		0.			0.		00000
2014		0.			0.		00000
2013		0.	<del> </del>		0.		00000
2012 2011			<del></del>	<del></del>			
			<del>'</del>				
2 Total of line 1, column (d)					2	.0	00000
	5-year base period - divide the total	on line 2 by 5,	or by the numbe	r of years			
the foundation has been in existe	ence if less than 5 years				3	0	00000
4 Enter the net value of noncharita	ble-use assets for 2016 from Part X,	line 5			4		
							•
5 Multiply line 4 by line 3					5		0.
6 Enter 1% of net investment inco	me (1% of Part I line 27h)				6		0.
• Elifel 1/9 Of the fill segment meon	me (170 or 1 art i, line 270)				•		
7 Add lines 5 and 6					7		0.
8 Enter qualifying distributions fro	m Part XII, line 4				8		0.
If line 8 is equal to or greater tha	an line 7, check the box in Part VI, line	tb, and com	plete that part us	ing a 1% tax rate.			
See the Part VI instructions.							<del></del>
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	990-PF (2016) CHARLES AND MITCH OTA FOUNDATION		46-	325558	34	Page 4
	rt VI Excise Tax Based on Investment Income (Section 4940(a),		1948 ·	see ins	tructi	ons)
	Exempt operating foundations described in section 4940(d)(2), check here 🕨 🗔 and enter "t		1	•		-
	Date of ruling or determination letter: (attach copy of letter if necessal		}			
<b>b</b> [	Domestic foundations that meet the section 4940(e) requirements in Part V, check here 🕒 🗀	ight and enter 1%	1			0.
	of Part I, line 27b					
	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Pa	• •				
	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others	enter -0-)	2			0.
	Add lines 1 and 2		3			0.
	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others	enter -0-)	4			0.
	Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0-		5	ļ		0.
	Credits/Payments*	i .				
	2016 estimated tax payments and 2015 overpayment credited to 2016 6a		4			
	Exempt foreign organizations - tax withheld at source	<del></del>	4			
	Tax paid with application for extension of time to file (Form 8868)	<del></del>	4			
	Backup withholding erroneously withheld 60		4			_
	Total credits and payments. Add lines 6a through 6d		7			0.
	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached		_8_			
	Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed	<b>.</b>	9			0.
	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	J	10			
11	Enter the amount of line 10 to be: Credited to 2017 estimated tax	Refunded	11	l		
	rt VII-A Statements Regarding Activities	<del></del>				- N-
	During the tax year, did the foundation attempt to influence any national, state, or local legislation	or did it participate or interven	e in	-		s No
	any political campaign?		٠.		a	<u> X</u>
-	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (s		,		Ь	<u> </u>
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and co	opies of any materials publis	shed or	}		
	distributed by the foundation in connection with the activities			}		
	Did the foundation file Form 1120-POL for this year?			}	lc	<u> </u>
	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year			j		}
	(1) On the foundation. ▶ \$ 0. (2) On foundation managers. ▶		<u>•</u>	İ		
	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure	tax imposed on foundation				
	managers. > \$					
	Has the foundation engaged in any activities that have not previously been reported to the IRS?			<u> </u>	2	X_
	If "Yes," attach a detailed description of the activities					ĺ
	Has the foundation made any changes, not previously reported to the IRS, in its governing instru	ment, articles of incorporation,	or			-
	bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes			_	3	X
	Did the foundation have unrelated business gross income of \$1,000 or more during the year?				la	X
	If "Yes," has it filed a tax return on Form 990-T for this year?		1/		lb .	
	Was there a liquidation, termination, dissolution, or substantial contraction during the year?			-	5	X
	If "Yes," attach the statement required by General Instruction T					
	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:				- 1	
	By language in the governing instrument, or      Such the solution that off at well among the solutions are solved in the solutions.	nations that applicationals the at-	An Inve	į		
	By state legislation that effectively amends the governing instrument so that no mandatory directions as the second restrictions and the second restrictions.	schons that conflict with the sta	ile law	1		.
	remain in the governing instrument?	4- David II and Jak and David N	4.	_	6 X	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," comple	te Part II, coi (c), and Part X	V	-	7	X_
٥.	Table the states to which the foundation reports or with which it is registered (see instructions).			İ	-	1
8a	Enter the states to which the foundation reports or with which it is registered (see instructions)	<u> </u>			1	1
	HI If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorn	ev General (or decionate)				1
	of each state as required by General Instruction G? If "No," attach explanation	cy delicial (or designate)	ĸ	I/A	.	
_	Is the foundation claiming status as a private operating foundation within the meaning of section	1 4042(1)(3) or 4042(1)(5) for on		''^ H	36	-
	year 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? If "Yes," comp	• • • • • • • • • • • • • • • • • • • •	uciidal	}		v
	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule list			<del></del>	9	$\frac{X}{X}$
10	Did any persons decome substantial continuations during the tax year it "Yes," attach a schedule list	ing ineir names and addresses			10   990-E	PF (2016)
				FULLI	JJJ~F	• (ZU10)

823541 11-23-16

Form **990-PF** (2016)

had not been removed from jeopardy before the first day of the tax year beginning in 2016?

orm 990-PF (2016) ' CHARLES AND MITCH OTA FO	UNDATION		<u>46-32555</u>	<b>84</b> Page <b>6</b>
Part VII-B   Statements Regarding Activities for Which I	orm 4720 May Be I	Required (continu	ued)	
5a During the year did the foundation pay or incur any amount to:				
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	1 4945(e))?	Ye	s X No	1 [
(2) Influence the outcome of any specific public election (see section 4955); o	r to carry on, directly or indir	ectly,	į	1 [
any voter registration drive?		Ye	s X No	1 [
(3) Provide a grant to an individual for travel, study, or other similar purposes	,	Ye	s X No	1 [
(4) Provide a grant to an organization other than a charitable, etc., organization	n described in section			
4945(d)(4)(A)? (see instructions)		Ye	s X No	
(5) Provide for any purpose other than religious, charitable, scientific, literary,	or educational purposes, or			
the prevention of cruelty to children or animals?			s X No	
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify und	der the exceptions described		,0 1223 110	1 (
section 53.4945 or in a current notice regarding disaster assistance (see instru	· ·	riogalationo	N/A	5 <b>b</b>
Organizations relying on a current notice regarding disaster assistance check h	•			
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption fi		aned		
expenditure responsibility for the grant?		√	s No	
If "Yes," attach the statement required by Regulations section 53 494			.5 110	, (
6a Did the foundation, during the year, receive any funds, directly or indirectly, to			ļ	
a personal benefit contract?	pay premiums on	□ v.	s X No	[ [
<ul><li>b Did the foundation, during the year, pay premiums, directly or indirectly, on a p</li></ul>	erconal honafit contract?	L T 6		
If "Yes" to 6b. file Form 8870	er sonar benefit contract?			Sb X
7a At any time during the tax year, was the foundation a party to a prohibited tax s	halter transaction?		es X No	( (
•		Y6	<u></u>	
Part VIII Information About Officers, Directors, Trust		anamana Uialah		7b
Paid Employees, and Contractors	ees, roundation wa	anagers, nigniy	y	
List all officers, directors, trustees, foundation managers and their	compensation			
Elst all officers, all esters, a asieces, realization managers and them	(b) Title, and average	(c) Compensation	(d) Contributions to	(a) Evnança
(a) Name and address	hours per week devoted to position	(If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
MITCH H. OTA	CHAIR, VICE I	RESIDENT,	DIR	
368 LEHUAKONA STREET				
KAHULUI, HI 96732	0.00	0.	0.	0.
DOREEN L. MIZUKI	PRESIDENT, SI	CRETAR-TR		
368 LEHUAKONA STREET	•	1		
KAHULUI, HI 96732	0.00	0.	0.	0.
RYAN ODANAKA	VICE PRESIDE	T. DIRECT		
368 LEHUAKONA STREET		,		
KAHULUI, HI 96732	0.00	0.	0.	0.
		<del>-</del>	<del>-</del>	
			]	
2 Compensation of five highest-paid employees (other than those inc	luded on line 1). If none	, enter "NONE."	L	
	(b) Title, and average		(d) Contributions to employee benefit plans and deferred	(e) Expense
(a) Name and address of each employee paid more than \$50,000	hours per week devoted to position	(c) Compensation	and deferred compensation	(e) Expense account, other allowances
NONE	acroica to position		Compensation	anowances
			(	
		<del></del>	<del></del>	
		1	į į	
		<del> </del>	<del>                                     </del>	
	†		] [	
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	1		į į	
	<del> </del>	<del> </del>	<del> </del>	
	1		ļ (	
	L	<del></del>	<del> </del>	
Total number of other employees paid over \$50,000				0
			Form	990-PF (2016)

Form 990-PF (2016) CHARLES AND MITCH OTA FOUNDATION		3255584 Page 7
Part VIII Information About Officers, Directors, Trustees, Foundation Paid Employees, and Contractors (continued)	on Managers, Highly	
3 Five highest-paid independent contractors for professional services. 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 statistic number of organizations and other beneficiaries served, conferences convened, research papers product.	al information such as the ced, etc.	Expenses
1 N/A		
2		
3		
4		
Part IX-B   Summary of Program-Related Investments  Describe the two largest program-related investments made by the foundation during the tax year on lin	nes 1 and 2	Amount
1N/A		, anount
2		
All other program-related investments. See instructions.  3		
Total, Add lines 1 through 3	<b>•</b>	0.

623561 11-23-16

Form **990-PF** (2016)

P	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations	ndations, see ins	structions)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes.		· <del></del>
а	Average monthly fair market value of securities	1a	0.
b	Average of monthly cash balances	1b	
C	Fair market value of all other assets	1c	
đ	Total (add lines 1a, b, and c)	1d	0.
е	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	0.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	
5	Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4	5	0.
6	Minimum investment return Enter 5% of line 5	6	0.
P	<b>art XI</b> Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations are foreign organizations check here and do not complete this part.)	nd certain	
1	Minimum investment return from Part X, line 6	1	0.
2a	Tax on investment income for 2016 from Part VI, line 5		
b	Income tax for 2016. (This does not include the tax from Part VI.)	]	
C	Add lines 2a and 2b	2c	0.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	0.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	0.
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	0.
P	art XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		_
a		1a	0.
b	· · ·	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b		3b	
4	Qualifying distributions Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	0.
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	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	<u>0.</u>
	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation 4940(e) reduction of tax in those years.	qualifies for the se	ection

Form **990-PF** (2016)

Part XIII Undistributed Income (see instructions)

1. Distributibles amount for 2016 from Part XI, late 7 2. Understudies amount for 2015 only 3. Excess distributions carryover, if any, to 2018. 3. Excess distributions carryover, if any, to 2018. 3. Excess distributions carryover, if any, to 2018. 3. From 2012 6. From 2015 6. From 2015 6. From 2015 6. From 2015 6. From 2015 6. From 2016 7. Total of times 5a through e 7. Total of times 6a times 6a total e 7. Total of times 6a times 6a total e 7. Total of times 6a times 6a total e 7. Total of times 6a times 6a total e 7. Total of times 6a times 6a total e 7. Total of times 6a times 6a total e 7. Total of times 6a times 6a total e 7. Total of times 6a times 6a total e 7. Total of times 6a times 6a total e 7. Total of times 6a times 6a times 6a total e 7. Total of times 6a times 6a times 6a total e 7. Total of times 6a times 6a times 6a total e 7. Total of times 6a ti		(a) Corpus	(b) Years prior to 2015	(c) 2015	(d) 2016
2. Unactivated rooms of any size if he end of 2016  A Total of proor years: 3. Excess distributions surryover, if any, to 2016.  From 2017  From 2017  From 2017  From 2018  Fro	1 Distributable amount for 2016 from Part XI,	· · · · · · · · · · · · · · · · · · ·			
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e Undistributed income for 2015. Subtract line 4a from line 2a. Taxable amount - see instr.  f Undistributed income for 2016. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2017  7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)  8 Excess distributions carryover from 2011 not applied on line 5 or line 7  9 Excess distributions carryover to 2017 Subtract lines 7 and 8 from line 6a  10 Analysis of line 9: a Excess from 2012 b Excess from 2013 c Excess from 2014 d Excess from 2015	d Subtract line 6c from line 6b. Taxable				
4a from line 2a. Taxable amount - see instr.  f Undistributed income for 2016. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2017  7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)  8 Excess distributions carryover from 2011 not applied on line 5 or line 7  9 Excess distributions carryover to 2017 Subtract lines 7 and 8 from line 6a  10 Analysis of line 9: a Excess from 2012 b Excess from 2013 c Excess from 2014 d Excess from 2015	F		0.		<u> </u>
f Undistributed income for 2016. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2017  7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)  8 Excess distributions carryover from 2011 not applied on line 5 or line 7  9 Excess distributions carryover to 2017 Subtract lines 7 and 8 from line 6a  10 Analysis of line 9: a Excess from 2012 b Excess from 2013 c Excess from 2014 d Excess from 2015	1		1		
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9 Excess distributions carryover to 2017 Subtract lines 7 and 8 from line 6a  10 Analysis of line 9: a Excess from 2012 b Excess from 2013 c Excess from 2014 d Excess from 2015	-	0.			
Subtract lines 7 and 8 from line 6a  10 Analysis of line 9:  a Excess from 2012 b Excess from 2013 c Excess from 2014 d Excess from 2015	· · · · · · · · · · · · · · · · · · ·			<u> </u>	
10 Analysis of line 9:  a Excess from 2012 b Excess from 2014 c Excess from 2015		0.	Ţ		
a Excess from 2012 b Excess from 2013 c Excess from 2014 d Excess from 2015	F				
b Excess from 2013 c Excess from 2014 d Excess from 2015	· · · · · · · · · · · · · · · · · · ·				
c Excess from 2014 d Excess from 2015	,				
d Excess from 2015					

623581 11-23-16

Form **990-PF** (2016)

ort XIV Private Operating Fo		<del></del>	<del></del>	N/A	
If the foundation has received a ruling or foundation, and the ruling is effective for					
			Vio agetina	1040()(2) 05 1	040(3)(5)
Check box to indicate whether the found		ing roundation described		4942(j)(3) or 4	942(j)(5)
Enter the lesser of the adjusted net	Tax year (a) 2016	(b) 2015	Prior 3 years (c) 2014	(d) 2013	(-) 7-4-1
income from Part I or the minimum	(a) 2010	(0) 2013	(6) 2014	(4) 2013	(e) Total
investment return from Part X for			}		}
each year listed		<del> </del>		<del></del>	<del> </del>
85% of line 2a		<del> </del>	<del></del>	<del></del>	<del> </del>
Qualifying distributions from Part XII,		}	ľ		
line 4 for each year listed		<del> </del>	<del></del>	<del></del>	<del> </del>
Amounts included in line 2c not			į		1
used directly for active conduct of					
exempt activities					<del> </del>
Qualifying distributions made directly		l	Ì		
for active conduct of exempt activities.				•	
Subtract line 2d from line 2c 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(i)(3)(B)(i)					
"Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
"Support" alternative test - enter		<del> </del>	1	<del> </del>	
(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			<del> </del>		ļ
organizations as provided in section 4942(j)(3)(B)(iii) (3) Largest amount of support from					
an exempt organization		<del> </del>	- <del> </del>	+	<del> </del>
(4) Gross investment income art XV   Supplementary Info	rmation (Compl	ete this part only	v if the foundation	n had \$5,000 or m	ore in assets
at any time during t			N/A		
<del></del>			N/F	<u> </u>	
Information Regarding Foundation List any managers of the foundation who		n than 20/ of the total or	ntributions recoved by t	a foundation hafara the all	and of any toy
year (but only if they have contributed in			malibutions received by t	ie foundation before the cit	ose of any tax
List any managers of the foundation who other entity) of which the foundation has	o own 10% or more of t s a 10% or greater inter	the stock of a corporationest.	n (or an equally large po	tion of the ownership of a	partnership or
Information Regarding Contribution Check here ► ☐ If the foundation of	inly makes contributions	s to preselected charitab	le organizations and doe		
the foundation makes gifts, grants, etc.	<del></del>				10 d.
a The name, address, and telephone num	ber or e-mail address o	f the person to whom ap	plications should be add	ressed:	
<b>b</b> The form in which applications should b	e submitted and inform	ation and materials they	should include:		
		·			
Any submission deadlines:					

Grants and Contributions Paid During the	ear or Approved for Future F	ayment		
Recipient	If recipient is an individual, show any relationship to	Foundation	Purpose of grant or	
Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
				1
NONE				
	-			
			i	
			i	
		··	<u></u>	
Total b Approved for future payment			<u>▶ 3a</u>	
a Approved for father payment				
NONE				
NONE				
			•	
	1	ı		I .

#### Part XVI-A **Analysis of Income-Producing Activities**

Inter gross amounts unless otherwise indicated.	Unrelated	Unrelated business income		ded by section 512, 513 or 514	(e)	
1 Program service revenue;	(a) Business code	(b) Amount	Exclu- sion code	(d) Amount	Related or exempt function income	
•	<b></b>					
b						
c	1 1				<del></del>	
d	l i					
e	l l					
f	_					
g Fees and contracts from government agencies	<b> </b>					
2 Membership dues and assessments	<b> </b>					
3 Interest on savings and temporary cash investments						
4 Dividends and interest from securities						
Net rental income or (loss) from real estate:     Debt-financed property						
<ul> <li>Not debt-financed property</li> <li>Net rental income or (loss) from personal property</li> </ul>						
7 Other investment income						
8 Gain or (loss) from sales of assets other than inventory						
9 Net income or (loss) from special events		<del> </del>				
10 Gross profit or (loss) from sales of inventory					· · · · · · · · · · · · · · · · · · ·	
11 Other revenue:						
a						
b	l I		-			
C			<del> </del>			
d	-		<del> </del>			
12 Subtotal. Add columns (b), (d), and (e)		0.		0.	0.	
13 Total Add line 12, columns (b), (d), and (e)	<del></del>	<u></u>		13	 	
(See worksheet in line 13 instructions to verify calculations.	.)				<u>.</u>	

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

▼	the foundation's exempt purposes (other than by providing funds for such purposes).
i	

Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of

Form 990-PF (2016)

623621 11-23-16

### Form 990-PF (2016) Part XVII In 6) CHARLES AND MITCH OTA FOUNDATION 46-325584 Information Regarding Transfers To and Transactions and Relationships With Noncharitable **Exempt Organizations**

Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of							on 501(c) of	1	Yes	No	
the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?											
a Transfers from the reporting foundation to a noncharitable exempt organization of:										122	
(1) Cash								1a(1) 1a(2)		X	
•	(2) Other assets										
b Other transactions: (1) Sales of assets to a noncharitable exempt organization										v	
(1) Sales of assets to a noncharitable exempt organization  (2) Purchases of assets from a noncharitable exempt organization								1b(1) 1b(2)		X	
•	(3) Rental of facilities, equipment, or other assets									X	
	(4) Reimbursement arrangements									X	
	•	or loan guarantees						1b(4) 1b(5)	_	X	
	•	mance of services or me	mbership or fundrai	sing solicitatio	ns			16(6)		X	
c SI	, haring of	facilities, equipment, ma	iling lists, other asse	ts, or paid emp	ployees			10		X	
	If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, o										
01	or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in										
CC	olumn (d)	the value of the goods,	other assets, or serv	ices received.	<del></del>						
a) Line	no (	(b) Amount involved	(c) Name of	noncharitable	exempt organization	(d) Description	(d) Description of transfers transactions, and sharing arrangements				
N/.				N/A							
							<del></del>				
			<del>                                     </del>			<del></del>					
			<del></del>								
			<del> </del>								
						<del></del>	<del></del>				
						+	<del></del>				
			<del></del>			+					
			<del> </del>								
			<del> </del>	<del> </del>							
	-		<del></del>		·						
						<del> </del>					
	_		<del> </del>			<del></del>					
20 10	the foun	idation directly or indirec	tly affiliated with or	related to one	or more tax-exempt organ	zations described					
		501(c) of the Code (other				124110110 400011004	Γ	Yes	X	□ No	
		mplete the following sch		/(-//							
(a) Name of organization					(b) Type of organization		(c) Description of relationship				
N/A											
			<del>_</del>								
					ig accompanying schedules and national information and informa		hae any knowledge Ma	y the IRS	discuss	this	
Sigi	וו	retuing the confect, and complete backward of prepare forms than taxpayer) is based on an important of which prepare has any knowledge							e prepa	rer str )?	
Her	<b> </b>	ecoura / Miss	uei		4/6/17	PRESI	Yes	. [_	] No		
	Sign	ature of officer or the stee	<del></del>	T	Date	Title	<b></b>				
		Print/Type preparer's na	ame	Preparer's s	ignature	Date	Check fright PTIN				
D - 1				V.J.	an Story		self- employed				
Paid Preparer Use Only									875	<u>;                                    </u>	
		Firm's name ► FUKUYA HASEGAWA PA			RTNERS, LLC		Firm's EIN ► <b>45</b> – <b>5</b>	3233	61		
		Frem's address 5 . 5 . 5	20	ļ							
		Firm's address ► 1580 MAKALOA STREET, SUITE 890					/225:				
		HONOLULU, HI 96814 Phone no. (808)									
							F	orm <b>99</b>	U-PF	(2016)	