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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

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 ▶ **Information about Form 990-PF and its instructions is at www.irs.gov/form990pf.**

OMB No 1545-0052
2016
Open to Public Inspection

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

Name of foundation GOLDEN RULE FAMILY FOUNDATION		A Employer identification number 46-3889437	
Number and street (or P O box number if mail is not delivered to street address) 5500 PRESTON ROAD SUITE 250		Room/suite	
City or town, state or province, country, and ZIP or foreign postal code DALLAS, TX 75205		B Telephone number (see instructions) (214) 252-3250	
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		C If exemption application is pending, check here <input type="checkbox"/> D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/> E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation			
I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ 1,241,844		J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis)	

Part I Analysis of Revenue and Expenses <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</i>		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)	392,950			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	35	35		
	4 Dividends and interest from securities	34,376	33,413		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	7,291			
	b Gross sales price for all assets on line 6a 1,043,280				
	7 Capital gain net income (from Part IV, line 2)		7,291		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule)					
12 Total. Add lines 1 through 11	434,652	40,739			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	2,000	2,000		0
	c Other professional fees (attach schedule)	22,299	2,090		20,075
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	822	443		0
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)				
	24 Total operating and administrative expenses. Add lines 13 through 23	25,121	4,533		20,075
	25 Contributions, gifts, grants paid	302,100			302,100
26 Total expenses and disbursements. Add lines 24 and 25	327,221	4,533		322,175	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	107,431				
b Net investment income (if negative, enter -0-)		36,206			
c Adjusted net income (if negative, enter -0-)					

Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing	57	17	17
	2 Savings and temporary cash investments	13,431	120,427	120,427
	3 Accounts receivable ▶ <u>1,008</u>			
	Less allowance for doubtful accounts ▶ _____	792	1,008	1,008
	4 Pledges receivable ▶ _____			
	Less allowance for doubtful accounts ▶ _____			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ _____			
	Less allowance for doubtful accounts ▶ _____			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments—U S and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)	1,127,280	1,127,539	1,120,392
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment basis ▶ _____			
Less accumulated depreciation (attach schedule) ▶ _____				
12 Investments—mortgage loans				
13 Investments—other (attach schedule)				
14 Land, buildings, and equipment basis ▶ _____				
Less accumulated depreciation (attach schedule) ▶ _____				
15 Other assets (describe ▶ _____)				
16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	1,141,560	1,248,991	1,241,844	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶ _____)			
	23 Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	0	0	
	28 Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
29 Retained earnings, accumulated income, endowment, or other funds	1,141,560	1,248,991		
30 Total net assets or fund balances (see instructions)	1,141,560	1,248,991		
31 Total liabilities and net assets/fund balances (see instructions) .	1,141,560	1,248,991		

Part III Analysis of Changes in Net Assets or Fund Balances			
1 Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)		1	1,141,560
2 Enter amount from Part I, line 27a		2	107,431
3 Other increases not included in line 2 (itemize) ▶ _____		3	0
4 Add lines 1, 2, and 3		4	1,248,991
5 Decreases not included in line 2 (itemize) ▶ _____		5	0
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .		6	1,248,991

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)		
1a See Additional Data Table						
b						
c						
d						
e						
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)			
a See Additional Data Table						
b						
c						
d						
e						
(i) F M V as of 12/31/69			(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))	
a See Additional Data Table						
b						
c						
d						
e						
2 Capital gain net income or (net capital loss)					2	7,291
{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }						
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)					3	
If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8						

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? Yes No
 If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2015	265,901	1,111,963	0.239128
2014	50,294	352,703	0.142596
2013	0	32,833	0.000000
2012			
2011			
2 Total of line 1, column (d)			2 0.381724
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years			3 0.127241
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5			4 1,149,211
5 Multiply line 4 by line 3			5 146,227
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 362
7 Add lines 5 and 6			7 146,589
8 Enter qualifying distributions from Part XII, line 4			8 322,175
If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions			

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see instructions)

Table with 11 rows for excise tax calculation. Includes fields for exempt foundations, domestic foundations, tax under section 511, subtitle A tax, tax based on investment income, credits/payments, and tax due/overpayment. Total amount owed is 362.

Part VII-A Statements Regarding Activities

Table with 10 rows for statements regarding activities. Includes questions about political campaign influence, political expenditures, unrelated business income, and substantial contributors. Includes Yes/No columns.

Part VII-A Statements Regarding Activities (continued)

11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions). 11 No
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions) 12 No
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A 13 Yes
14 The books are in care of TOLLESON PRIVATE WEALTH MANAGEMENT Telephone no (214) 252-3250
Located at 5500 PRESTON ROAD SUITE 250 DALLAS TX ZIP+4 75205
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 -Check here 15
16 At any time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes," enter the name of the foreign country 16 Yes No

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.
1a During the year did the foundation (either directly or indirectly)
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? Yes No
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? Yes No
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes No
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes No
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? Yes No
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). Yes No
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here. 1b
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2016? 1c No
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))
a At the end of tax year 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016? If "Yes," list the years 20, 20, 20, 20 Yes No
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement-see instructions). 2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20, 20, 20, 20
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Yes No
b If "Yes," did it have excess business holdings in 2016 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period?(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2016). 3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4a No
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2016? 4b No

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

5a During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? Yes No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? Yes No

(3) Provide a grant to an individual for travel, study, or other similar purposes? Yes No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions). Yes No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? Yes No

b If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? Yes No
 Organizations relying on a current notice regarding disaster assistance check here.

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? Yes No
 If "Yes," attach the statement required by Regulations section 53.4945–5(d)

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? Yes No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? Yes No
 If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? Yes No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? Yes No

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

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
See Additional Data Table				

2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	Title, and average hours per week (b) devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
NONE				

Total number of other employees paid over \$50,000. 0

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

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

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

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2

	Amount
1	
2	
All other program-related investments. See instructions	
3	

Total. Add lines 1 through 3 ▶ 0

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities.	1a	1,085,016
b	Average of monthly cash balances.	1b	81,696
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	1,166,712
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	1,166,712
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	17,501
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	1,149,211
6	Minimum investment return. Enter 5% of line 5.	6	57,461

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here and do not complete this part.)

1	Minimum investment return from Part X, line 6.	1	57,461
2a	Tax on investment income for 2016 from Part VI, line 5.	2a	362
b	Income tax for 2016 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	362
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	57,099
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	57,099
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	57,099

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26.	1a	322,175
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	4	322,175
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	362
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	321,813

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2015	(c) 2015	(d) 2016
1 Distributable amount for 2016 from Part XI, line 7				57,099
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only.			0	
b Total for prior years 20___, 20___, 20___		0		
3 Excess distributions carryover, if any, to 2016				
a From 2011.				
b From 2012.				
c From 2013.				
d From 2014.			31,017	
e From 2015.			211,061	
f Total of lines 3a through e.	242,078			
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ <u>322,175</u>				
a Applied to 2015, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2016 distributable amount.				57,099
e Remaining amount distributed out of corpus	265,076			
5 Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a))				0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	507,154			
b Prior years' undistributed income Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2015 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2017				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2011 not applied on line 5 or line 7 (see instructions).	0			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	507,154			
10 Analysis of line 9				
a Excess from 2012.				
b Excess from 2013.				
c Excess from 2014.			31,017	
d Excess from 2015.			211,061	
e Excess from 2016.			265,076	

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2016, enter the date of the ruling. ▶

b Check box to indicate whether the organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

	Tax year	Prior 3 years			(e) Total
	(a) 2016	(b) 2015	(c) 2014	(d) 2013	
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c "Support" alternative test—enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see instructions.)

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))
See Additional Data Table

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

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

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

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

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

c Any submission deadlines

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

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> See Additional Data Table				
Total ▶ 3a				302,100
b <i>Approved for future payment</i>				
Total ▶ 3b				0

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

List and describe the kind(s) of property sold (e.g., real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)
AMG YACKTMAN FUND		2015-11-27	2016-06-29
ANGEL OAK MULTI-STRATEGY INCOME FUND		2015-11-27	2016-03-22
ANGEL OAK MULTI-STRATEGY INCOME FUND		2015-11-27	2016-06-29
ANGEL OAK MULTI-STRATEGY INCOME FUND		2015-11-27	2016-10-11
ANGEL OAK MULTI-STRATEGY INCOME FUND		2015-12-31	2016-10-11
EAGLE MLP STRATEGY FUND		2015-11-27	2016-03-22
EAGLE MLP STRATEGY FUND		2015-11-27	2016-06-29
EAGLE MLP STRATEGY FUND		2015-11-27	2016-10-11
INVESCO FLOATING RATE FUND Y		2015-11-27	2016-06-29
INVESCO FLOATING RATE FUND Y		2015-11-27	2016-10-11

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
21,800		24,022	-2,222
36,900		39,435	-2,535
23,500		25,143	-1,643
143,925		151,137	-7,212
5,060		5,215	-155
14,900		18,717	-3,817
20,600		21,329	-729
19,200		18,060	1,140
17,900		17,942	-42
92,435		89,973	2,462

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-2,222
			-2,535
			-1,643
			-7,212
			-155
			-3,817
			-729
			1,140
			-42
			2,462

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

List and describe the kind(s) of property sold (e.g., real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)
INVESCO FLOATING RATE FUND Y		2015-12-31	2016-10-11
INVESCO FLOATING RATE FUND Y		2016-03-22	2016-10-11
MATTHEWS ASIA DIVIDEND FUND		2015-11-27	2016-06-29
MFS INTERNATIONAL VALUE		2015-11-27	2016-03-22
MFS INTERNATIONAL VALUE		2015-11-27	2016-06-29
VANGUARD LIMITED-TERM TAX EXEMPT ADM		2015-11-27	2016-02-09
VANGUARD LIMITED-TERM TAX EXEMPT ADM		2016-03-22	2016-04-13
VANGUARD LIMITED-TERM TAX EXEMPT ADM		2015-11-27	2016-04-13
VANGUARD SHORT-TERM FEDERAL BOND ADM		2016-04-13	2016-06-29
VANGUARD SHORT-TERM FEDERAL BOND ADM		2016-04-13	2016-10-11

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
3,143		3,015	128
5,148		4,915	233
10,500		10,345	155
2,000		2,051	-51
12,500		12,578	-78
5,200		5,168	32
15,140		15,115	25
211,473		210,547	926
32,700		32,597	103
194,026		194,218	-192

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			128
			233
			155
			-51
			-78
			32
			25
			926
			103
			-192

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

List and describe the kind(s) of property sold (e.g., real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)
WHG INCOME OPPORTUNITY INSTL		2015-11-27	2016-06-29
WHG INCOME OPPORTUNITY INSTL		2015-11-27	2016-10-11
WHG INCOME OPPORTUNITY INSTL		2015-12-31	2016-10-11
WHG INCOME OPPORTUNITY INSTL		2016-02-09	2016-10-11
WILLIAM BLAIR SMALL-MID CAP GROWTH		2015-11-27	2016-06-29
CAPITAL GAINS DIVIDENDS	P		

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
17,200		16,910	290
103,453		101,705	1,748
3,100		3,015	85
2,386		2,215	171
9,800		10,622	-822
19,291			19,291

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			290
			1,748
			85
			171
			-822
			19,291

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
DAYNA MANNING 5500 PRESTON ROAD SUITE 250 DALLAS, TX 75205	VICE PRES/DIR 1 00	0	0	0
GENA TADEWALD 5500 PRESTON ROAD SUITE 250 DALLAS, TX 75205	PRES/DIR 1 00	0	0	0
JEAN ROGERS 5500 PRESTON ROAD SUITE 250 DALLAS, TX 75205	DIR/SEC 1 00	0	0	0
ANTHONY ROGERS 5500 PRESTON ROAD SUITE 250 DALLAS, TX 75205	DIR/CO-TREAS 1 00	0	0	0
KYRA ROGERS 5500 PRESTON ROAD SUITE 250 DALLAS, TX 75205	DIR/CO-TREAS 1 00	0	0	0

Form 990PF Part XV Line 1a - List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000).

DAYNA MANNING

GENA TADEWALD

JEAN ROGERS

ANTHONY ROGERS

KYRA ROGERS

Form 990FP Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BRAIN & BEHAVIOR RESEARCH FOUNDATION 90 PARK AVENUE 16TH FLOOR NEW YORK, NY 10016		501(C)(3)	MENTAL HEALTH RESEARCH	35,000
CONFERENCE ON CRIMES AGAINST WOMEN 4411 LEMMON AVE STE 201 DALLAS, TX 75219		501(C)(3)	DOMESTIC ABUSE PROTECTION AND PREVENTION	25,000
MY POSSIBILITIES 1631 DORCHESTER DRIVE PLANO, TX 75075		501(C)(3)	EDUCATION FOR ADULTS WITH DISABILITIES	10,000
TREVOR PROJECT INC 8704 SANTA MONICA BLVD STE 200 WEST HOLLYWOOD, CA 90069		501(C)(3)	CRISIS INTERVENTION AND COUNSELING	10,000
CLINICAL DATA INTERCHANGE STANDARDS CONSORTIUM INC PO BOX 2068 ROUND ROCK, TX 78680		501(C)(3)	MENTAL HEALTH	15,000
STORYTELLER CHILDREN'S CENTER 2115 STATE STREET SANTA BARBARA, CA 93105		501(C)(3)	EDUCATION	20,000
CENTER FOR BRAINHEALTH 2200 WEST MOCKINGBIRD LANE DALLAS, TX 75235		501(C)(3)	MENTAL HEALTH	20,000
THE REFUGE FOR DMST PO BOX 90804 AUSTIN, TX 78709		501(C)(3)	VICTIM'S SERVICE	25,000
OPERA SANTA BARBARA 1330 STATE STREET SUITE 209 SANTA BARBARA, CA 93101		501(C)(3)	EDUCATION	20,000
EMILY PROGRAM FOUNDATION 1295 BANDANA BLVD W STE 210 ST PAUL, MN 55108		501(C)(3)	MENTAL HEALTH	10,000
HAVEN FOR HOPE OF BEXAR COUNTY 1 HAVEN FOR HOPE WAY SAN ANTONIO, TX 78207		501(C)(3)	HUMAN SERVICES	15,000
HILL COUNTRY FAMILY SERVICES 118 W ADVOGT ST BOERNE, TX 78006		501(C)(3)	FAMILY SERVICES	10,000
PATRIOT PAWS SERVICE DOGS 254 RANCH TRAIL ROCKWALL, TX 75032		501(C)(3)	VETERAN'S SERVICES	10,000
SOUTHERN METHODIST UNIVERSITY 3315 DANIEL AVENUE STE 30 DALLAS, TX 75205		501(C)(3)	YOUTH SERVICES	30,000
SONGWRITING WITHSOLDIERS BARTON OAKS PLAZA 2 901 S MOPAC EXPRESSWAY SUITE 225 AUSTIN, TX 78746		501(C)(3)	VETERAN'S SERVICES	10,000
Total ▶				302,100
3a				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SPIRIT REINS 2055 COUNTRY RD 284 LIBERTY HILL, TX 78642		501(C)(3)	MENTAL HEALTH	20,000
GIRLS INC OF SANTA FE 301 HILLSIDE AVE SANTA FE, NM 87501		501(C)(3)	YOUTH SERVICES	15,650
PHILANTHROPY SOUTHWEST 8350 N CENTRAL EXPRESSWAY SUITE M-1012 DALLAS, TX 75206		501(C)(3)	COMMUNITY SUPPORT	450
THE MARY KAY FOUNDATION PO BOX 799044 DALLAS, TX 75379		501(C)(3)	WOMEN'S SERVICES	1,000
Total 3a				302,100

TY 2016 Accounting Fees Schedule**Name:** GOLDEN RULE FAMILY FOUNDATION**EIN:** 46-3889437

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREP FEES	2,000	2,000		0

TY 2016 Dissolution Stmt**Name:** GOLDEN RULE FAMILY FOUNDATION**EIN:** 46-3889437

Dissolution Name	Dissolution Address	Explanation	Dissolution Amount
CLINICAL DATA INTERCHANGE STANDARDS CONSORTIUM	PO BOX 2068 ROUND ROCK, TX 78680	CASH	15,000
CONFERENCE ON CRIMES AGAINST WOMEN	4411 LEMMON AVE STE 201 DALLAS, TX 75219	CASH	25,000
STORYTELLER CHILDREN'S CENTER	2115 STATE ST SANTA BARBARA, CA 93105	CASH	20,000
CENTER FOR BRAINHEALTH	2200 WEST MOCKINGBIRD LANE DALLAS, TX 75235	CASH	20,000
THE REFUGE FOR DMST	PO BOX 90804 AUSTIN, TX 78709	CASH	25,000
OPERA SANTA BARBARA	1330 STATE STREET SUITE 209 SANTA BARBARA, CA 93101	CASH	20,000
BRAIN AND BEHAVIOR RESEARCH FOUNDATION	90 PARK AVE 16TH FLOOR NEW YORK, NY 10016	CASH	35,000
EMILY PROGRAM FOUNDATION	1295 BANDANA BLVD W STE 210 ST PAUL, MN 55108	CASH	10,000
HAVEN FOR HOPE OF BEXAR COUNTY	1 HAVEN FOR HOPE WAY SAN ANTONIO, TX 78207	CASH	15,000
HILL COUNTRY FAMILY SERVICES	118 W ADVOGT ST BOERNE, TX 78006	CASH	10,000
MY POSSIBILITIES	1631 DORCHESTER DR PLANO, TX 75075	CASH	10,000
PATRIOT PAWS SERVICE DOGS	3315 DANIEL AVE STE 30 DALLAS, TX 75205	CASH	10,000
SONGWRITING WITHSOLDIERS	BARTON OAKS PLAZA 2 901 S MOPAC EXP AUSTIN, TX 78746	CASH	10,000
SPIRIT REINS	2055 COUNTY RD 284 LIBERTY HILL, TX 78642	CASH	20,000
TREVOR PROJECT	8704 SANTA MONICA BLVD SUITE 200 WEST HOLLYWOOD, CA 90069	CASH	10,000
GIRLS INC OF SANTA FE	301 HILLSIDE AVE SANTA FE, NM 87501	CASH	15,650
PHILANTHROPY SOUTHWEST	8350 N CENTRAL EXPRESSWAY SUITE M-1 DALLAS, TX 75206	CASH	450
THE MARY KAY FOUNDATION	PO BOX 799044 DALLAS, TX 75379	CASH	1,000
SOUTHERN METHODIST UNIVERSITY	3315 DANIEL AVENUE STE 30 DALLAS, TX 75205	CASH	30,000

TY 2016 Investments Corporate Stock Schedule**Name:** GOLDEN RULE FAMILY FOUNDATION**EIN:** 46-3889437

Name of Stock	End of Year Book Value	End of Year Fair Market Value
PERSHING EQUITY ACCOUNT	1,127,539	1,120,392

TY 2016 LiquidationExplanationStmt

Name: GOLDEN RULE FAMILY FOUNDATION

EIN: 46-3889437

Statement: THE FOUNDATION HAD A SUBSTANTIAL CONTRACTION DURING 2016 AS THE RESULT OF CHARITABLE DISTRIBUTIONS MADE TO SEVERAL DIFFERENT ORGANIZATIONS. THE DISTRIBUTIONS WERE MADE OVER THE COURSE OF THE TAX YEAR ON THE FOLLOWING DATES: CLINICAL DATA INTERCHANGE STANDARDS CONSORTIUM, INC. 2/12/16 CONFERENCE ON CRIMES AGAINST WOMEN, INC. 3/21/16 STORYTELLER CHILDREN'S CENTER 7/6/16 CENTER FOR BRAINHEALTH 7/6/16 THE REFUGE FOR DMST 7/6/16 OPERA SANTA BARBARA 7/6/16 BRAIN AND BEHAVIOR RESEARCH FOUNDATION 7/6/16 EMILY PROGRAM FOUNDATION 7/6/16 HAVEN FOR HOPE OF BEXAR COUNTY 7/6/16 HILL COUNTRY FAMILY SERVICES 7/6/16 MY POSSIBILITIES 7/6/16 PATRIOT PAWS SERVICE DOGS 7/6/16 SOUTHERN METHODIST UNIVERSITY 7/6/16 SONGWRITINGWITH:SOLDIERS 7/6/16 SPIRIT REINS 7/6/16 TREVOR PROJECT 7/6/16 GIRLS INC OF SANTA FE 8/3/16 PHILANTHROPY SOUTHWEST 9/8/16 THE MARY KAY FOUNDATION 9/8/16

TY 2016 Other Professional Fees Schedule**Name:** GOLDEN RULE FAMILY FOUNDATION**EIN:** 46-3889437

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PHILANTHROPY ADVISORY FEES	20,000	0		20,000
MANAGEMENT FEES	2,224	2,090		0
REGISTERED AGENT FEE	50	0		50
STATE OR LOCAL FILING FEE	25	0		25

**TY 2016 Substantial Contributors
Schedule****Name:** GOLDEN RULE FAMILY FOUNDATION**EIN:** 46-3889437**Name****Address**

KAREN ROGERS STILL

5500 PRESTON ROAD SUITE 250
DALLAS, TX 75205

TY 2016 Taxes Schedule**Name:** GOLDEN RULE FAMILY FOUNDATION**EIN:** 46-3889437

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES PAID	443	443		0
FEDERAL TAXES	379	0		0

Schedule B
(Form 990, 990-EZ,
or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors
▶ Attach to Form 990, 990-EZ, or 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

Name of the organization
GOLDEN RULE FAMILY FOUNDATION

Employer identification number
46-3889437

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

- 501(c)() (enter number) organization
- 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

Form 990-PF

- 527 political organization
- 501(c)(3) exempt private foundation
- 4947(a)(1) nonexempt charitable trust treated as a private foundation
- 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions

General Rule

- For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other property) from any one contributor Complete Parts I and II See instructions for determining a contributor's total contributions

Special Rules

- For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹ 3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II
- 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, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals Complete Parts I, II, and III
- 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 Do not 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 that is not covered by the General Rule and/or the Special Rules does not 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 990PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Name of organization
GOLDEN RULE FAMILY FOUNDATION

Employer identification number
46-3889437

Part I **Contributors** (see instructions) Use duplicate copies of Part I if additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	ANTHONY ROGERS 5500 PRESTON ROAD SUITE 250 DALLAS, TX 75205	\$ 89,800	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
2	RYAN ROGERS 5500 PRESTON ROAD SUITE 250 DALLAS, TX 75205	\$ 76,000	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
3	JEAN ROGERS LIVING TRUST 5500 PRESTON ROAD SUITE 250 DALLAS, TX 75205	\$ 30,000	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
4	THE TADEWALD REVOCABLE TRUST 5500 PRESTON ROAD SUITE 250 DALLAS, TX 75205	\$ 164,500	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
5	KAREN STILL 5500 PRESTON ROAD SUITE 250 DALLAS, TX 75205	\$ 26,000	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
.		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)

Name of organization GOLDEN RULE FAMILY FOUNDATION	Employer identification number 46-3889437
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Part II **Noncash Property**

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
(see instructions) Use duplicate copies of Part II if additional space is needed			
_____	_____ _____ _____	_____ \$	_____
_____	_____ _____ _____	_____ \$	_____
_____	_____ _____ _____	_____ \$	_____
_____	_____ _____ _____	_____ \$	_____
_____	_____ _____ _____	_____ \$	_____
_____	_____ _____ _____	_____ \$	_____
_____	_____ _____ _____	_____ \$	_____

Name of organization GOLDEN RULE FAMILY FOUNDATION	Employer identification number 46-3889437
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Part III *Exclusively* religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (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 the year. (Enter this information once. See instructions.) ▶ \$ _____
Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____	_____	_____
	_____	_____	_____

(e) Transfer of gift Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
_____	_____
_____	_____

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____	_____	_____
	_____	_____	_____

(e) Transfer of gift Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
_____	_____
_____	_____

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____	_____	_____
	_____	_____	_____

(e) Transfer of gift Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
_____	_____
_____	_____

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____	_____	_____
	_____	_____	_____

(e) Transfer of gift Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
_____	_____
_____	_____