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## 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 separate instructions is at [www.irs.gov/form990pf](http://www.irs.gov/form990pf).

2016

Open to Public Inspection

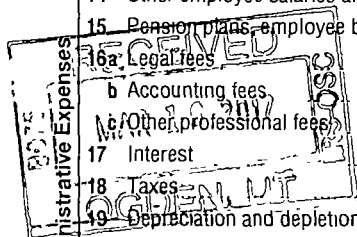
For calendar year 2016 or tax year beginning

, and ending

|                                                                                                                                                                                                                                                                                                                 |                                                                                                                                                  |                                                                                                                                                                            |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name of foundation<br><b>NORMAN &amp; ELAINE POLSKY FAMILY CHARITABLE FOUNDATION</b>                                                                                                                                                                                                                            |                                                                                                                                                  | A Employer identification number<br><b>48-1232337</b>                                                                                                                      |
| Number and street (or P.O. box number if mail is not delivered to street address)<br><b>4801 WEST 110TH STREET</b>                                                                                                                                                                                              | Room/suite<br><b>#150</b>                                                                                                                        | B Telephone number<br><b>913-341-8500</b>                                                                                                                                  |
| City or town, state or province, country, and ZIP or foreign postal code<br><b>OVERLAND PARK, KS 66211</b>                                                                                                                                                                                                      |                                                                                                                                                  | C If exemption application is pending, check here <input type="checkbox"/>                                                                                                 |
| G Check all that apply:<br><input type="checkbox"/> Initial return<br><input type="checkbox"/> Final return<br><input type="checkbox"/> Address change<br><input type="checkbox"/> Initial return of a former public charity<br><input type="checkbox"/> Amended return<br><input type="checkbox"/> Name change |                                                                                                                                                  | D 1 Foreign organizations, check here <input type="checkbox"/><br>2 Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/> |
| H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation<br><input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation                                                               |                                                                                                                                                  | E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>                                                              |
| I Fair market value of all assets at end of year (from Part II, col (c), line 16)<br><b>\$ 3,216,674.</b> (Part I, column (d) must be on cash basis)                                                                                                                                                            | J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual<br><input type="checkbox"/> Other (specify) _____ | F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>                                                           |

| Part I Analysis of Revenue and Expenses<br>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).) |  | (a) Revenue and expenses per books | (b) Net investment income | (c) Adjusted net income | (d) Disbursements for charitable purposes (cash basis only) |
|-----------------------------------------------------------------------------------------------------------------------------------------------------|--|------------------------------------|---------------------------|-------------------------|-------------------------------------------------------------|
| 1 Contributions, gifts, grants, etc., received                                                                                                      |  | 937,501.                           |                           | N/A                     |                                                             |
| 2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B                                                                 |  |                                    |                           |                         |                                                             |
| 3 Interest on savings and temporary cash investments                                                                                                |  |                                    |                           |                         |                                                             |
| 4 Dividends and interest from securities                                                                                                            |  | 53,864.                            | 53,864.                   |                         | STATEMENT 1                                                 |
| 5a Gross rents                                                                                                                                      |  |                                    |                           |                         |                                                             |
| b Net rental income or (loss)                                                                                                                       |  |                                    |                           |                         |                                                             |
| 6a Net gain or (loss) from sale of assets not on line 10                                                                                            |  | 98,313.                            |                           |                         |                                                             |
| b Gross sales price for all assets on line 6a <b>1,504,489.</b>                                                                                     |  |                                    |                           |                         |                                                             |
| 7 Capital gain net income (from Part IV, line 2)                                                                                                    |  |                                    | 98,313.                   |                         |                                                             |
| 8 Net short-term capital gain                                                                                                                       |  |                                    |                           |                         |                                                             |
| 9 Income modifications<br>Gross sales less returns and allowances                                                                                   |  |                                    |                           |                         |                                                             |
| 10a Less: Cost of goods sold                                                                                                                        |  |                                    |                           |                         |                                                             |
| c Gross profit or (loss)                                                                                                                            |  |                                    |                           |                         |                                                             |
| 11 Other income                                                                                                                                     |  | 108.                               | 108.                      |                         | STATEMENT 2                                                 |
| 12 Total. Add lines 1 through 11                                                                                                                    |  | 1,089,786.                         | 152,285.                  |                         |                                                             |
| 13 Compensation of officers, directors, trustees, etc.                                                                                              |  | 0.                                 | 0.                        |                         | 0.                                                          |
| 14 Other employee salaries and wages                                                                                                                |  |                                    |                           |                         |                                                             |
| 15 Pension plans, employee benefits                                                                                                                 |  |                                    |                           |                         |                                                             |
| 16a Legal fees STMT 3                                                                                                                               |  | 1,457.                             | 1,457.                    |                         | 0.                                                          |
| b Accounting fees STMT 4                                                                                                                            |  | 3,310.                             | 3,310.                    |                         | 0.                                                          |
| c Other professional fees STMT 5                                                                                                                    |  | 14,173.                            | 14,173.                   |                         | 0.                                                          |
| 17 Interest                                                                                                                                         |  |                                    |                           |                         |                                                             |
| 18 Taxes STMT 6                                                                                                                                     |  | 2,195.                             | 1,304.                    |                         | 0.                                                          |
| 19 Depreciation and depletion                                                                                                                       |  |                                    |                           |                         |                                                             |
| 20 Occupancy                                                                                                                                        |  |                                    |                           |                         |                                                             |
| 21 Travel, conferences, and meetings                                                                                                                |  | 2,665.                             | 2,665.                    |                         | 0.                                                          |
| 22 Printing and publications                                                                                                                        |  |                                    |                           |                         |                                                             |
| 23 Other expenses STMT 7                                                                                                                            |  | 40.                                | 40.                       |                         | 0.                                                          |
| 24 Total operating and administrative expenses. Add lines 13 through 23                                                                             |  | 23,840.                            | 22,949.                   |                         | 0.                                                          |
| 25 Contributions, gifts, grants paid                                                                                                                |  | 129,000.                           |                           |                         | 129,000.                                                    |
| 26 Total expenses and disbursements. Add lines 24 and 25                                                                                            |  | 152,840.                           | 22,949.                   |                         | 129,000.                                                    |
| 27 Subtract line 26 from line 12:                                                                                                                   |  |                                    |                           |                         |                                                             |
| a Excess of revenue over expenses and disbursements                                                                                                 |  | 936,946.                           |                           |                         |                                                             |
| b Net investment income (if negative, enter -0-)                                                                                                    |  |                                    | 129,336.                  |                         |                                                             |
| c Adjusted net income (if negative, enter -0-)                                                                                                      |  |                                    |                           | N/A                     |                                                             |

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**NORMAN & ELAINE POLSKY FAMILY**

Form 990-PF (2016)

**CHARITABLE FOUNDATION**

48-1232337

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| Part II Balance Sheets                                                                           |                                                                                           | Beginning of year                                       |                | End of year           |  |
|--------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------|---------------------------------------------------------|----------------|-----------------------|--|
|                                                                                                  |                                                                                           | (a) Book Value                                          | (b) Book Value | (c) Fair Market Value |  |
| Assets                                                                                           | 1 Cash - non-interest-bearing                                                             | 8,457.                                                  | 6,093.         | 6,093.                |  |
|                                                                                                  | 2 Savings and temporary cash investments                                                  | 34,018.                                                 | 816,776.       | 816,776.              |  |
|                                                                                                  | 3 Accounts receivable ▶                                                                   |                                                         |                |                       |  |
|                                                                                                  | Less: allowance for doubtful accounts ▶                                                   |                                                         |                |                       |  |
|                                                                                                  | 4 Pledges receivable ▶                                                                    |                                                         |                |                       |  |
|                                                                                                  | 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 ▶                                                   |                                                         |                |                       |  |
|                                                                                                  | 8 Inventories for sale or use                                                             |                                                         |                |                       |  |
|                                                                                                  | 9 Prepaid expenses and deferred charges                                                   |                                                         |                |                       |  |
|                                                                                                  | 10a Investments - U.S. and state government obligations                                   |                                                         |                |                       |  |
|                                                                                                  | b Investments - corporate stock STMT 8                                                    | 0.                                                      | 164,711.       | 150,882.              |  |
|                                                                                                  | c Investments - corporate bonds                                                           |                                                         |                |                       |  |
|                                                                                                  | Liabilities                                                                               | 11 Investments - land, buildings, and equipment basis ▶ |                |                       |  |
| Less: accumulated depreciation ▶                                                                 |                                                                                           |                                                         |                |                       |  |
| 12 Investments - mortgage loans                                                                  |                                                                                           |                                                         |                |                       |  |
| 13 Investments - other STMT 9                                                                    |                                                                                           | 1,051,282.                                              | 2,093,768.     | 2,241,066.            |  |
| 14 Land, buildings, and equipment basis ▶                                                        |                                                                                           |                                                         |                |                       |  |
| Less: accumulated depreciation ▶                                                                 |                                                                                           | 1,051,974.                                              | 0.             | 0.                    |  |
| 15 Other assets (describe STATEMENT 10)                                                          |                                                                                           | 528.                                                    | 1,857.         | 1,857.                |  |
| 16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item i) |                                                                                           | 2,146,259.                                              | 3,083,205.     | 3,216,674.            |  |
| 17 Accounts payable and accrued expenses                                                         |                                                                                           |                                                         |                |                       |  |
| 18 Grants payable                                                                                |                                                                                           |                                                         |                |                       |  |
| Net Assets or Fund Balances                                                                      | 19 Deferred revenue                                                                       |                                                         |                |                       |  |
|                                                                                                  | 20 Loans from officers, directors, trustees, and other disqualified persons               |                                                         |                |                       |  |
|                                                                                                  | 21 Mortgages and other notes payable                                                      |                                                         |                |                       |  |
|                                                                                                  | 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"/>                   |                                                         |                |                       |  |
|                                                                                                  | 24 Unrestricted                                                                           |                                                         |                |                       |  |
|                                                                                                  | 25 Temporarily restricted                                                                 |                                                         |                |                       |  |
|                                                                                                  | 26 Permanently restricted                                                                 |                                                         |                |                       |  |
|                                                                                                  | Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> |                                                         |                |                       |  |
|                                                                                                  | 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                       | 2,146,259.                                              | 3,083,205.     |                       |  |
| 30 Total net assets or fund balances                                                             | 2,146,259.                                                                                | 3,083,205.                                              |                |                       |  |
| 31 Total liabilities and net assets/fund balances                                                | 2,146,259.                                                                                | 3,083,205.                                              |                |                       |  |

**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<br>(must agree with end-of-year figure reported on prior year's return) | 1 | 2,146,259. |
| 2 Enter amount from Part I, line 27a                                                                                                                            | 2 | 936,946.   |
| 3 Other increases not included in line 2 (itemize) ▶                                                                                                            | 3 | 0.         |
| 4 Add lines 1, 2, and 3                                                                                                                                         | 4 | 3,083,205. |
| 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 | 3,083,205. |

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**NORMAN & ELAINE POLSKY FAMILY**

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**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<br>P - Purchase<br>D - Donation | (c) Date acquired<br>(mo., day, yr.) | (d) Date sold<br>(mo., day, yr.) |
|------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------|--------------------------------------|----------------------------------|
| 1a                                                                                                                                 |                                                  |                                      |                                  |
| b <b>SEE ATTACHED STATEMENTS</b>                                                                                                   |                                                  |                                      |                                  |
| c                                                                                                                                  |                                                  |                                      |                                  |
| d                                                                                                                                  |                                                  |                                      |                                  |
| e                                                                                                                                  |                                                  |                                      |                                  |

| (e) Gross sales price | (f) Depreciation allowed<br>(or allowable) | (g) Cost or other basis<br>plus expense of sale | (h) Gain or (loss)<br>(e) plus (f) minus (g) |
|-----------------------|--------------------------------------------|-------------------------------------------------|----------------------------------------------|
| a                     |                                            |                                                 |                                              |
| b                     |                                            |                                                 |                                              |
| c                     |                                            |                                                 |                                              |
| d                     |                                            |                                                 |                                              |
| e <b>1,504,489.</b>   |                                            | <b>1,406,176.</b>                               | <b>98,313.</b>                               |

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

| (i) F.M.V. as of 12/31/69 | (j) Adjusted basis<br>as of 12/31/69 | (k) Excess of col. (i)<br>over col. (j), if any | (l) Gains (Col. (h) gain minus<br>col. (k), but not less than -0-) or<br>Losses (from col. (h)) |
|---------------------------|--------------------------------------|-------------------------------------------------|-------------------------------------------------------------------------------------------------|
| a                         |                                      |                                                 |                                                                                                 |
| b                         |                                      |                                                 |                                                                                                 |
| c                         |                                      |                                                 |                                                                                                 |
| d                         |                                      |                                                 |                                                                                                 |
| e                         |                                      |                                                 | <b>98,313.</b>                                                                                  |

|                                                                                                                                                                                 |                                                                                     |   |                |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|---|----------------|
| 2 Capital gain net income or (net capital loss)                                                                                                                                 | { If gain, also enter in Part I, line 7<br>If (loss), enter -0- in Part I, line 7 } | 2 | <b>98,313.</b> |
| 3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):<br>If gain, also enter in Part I, line 8, column (c).<br>If (loss), enter -0- in Part I, line 8 | }                                                                                   | 3 | <b>N/A</b>     |

**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 the instructions before making any entries.

| (a) Base period years<br>Calendar year (or tax year beginning in) | (b) Adjusted qualifying distributions | (c) Net value of noncharitable-use assets | (d) Distribution ratio<br>(col. (b) divided by col. (c)) |
|-------------------------------------------------------------------|---------------------------------------|-------------------------------------------|----------------------------------------------------------|
| 2015                                                              |                                       |                                           |                                                          |
| 2014                                                              |                                       |                                           |                                                          |
| 2013                                                              |                                       |                                           |                                                          |
| 2012                                                              |                                       |                                           |                                                          |
| 2011                                                              |                                       |                                           |                                                          |

|                                                                                                                                                                                                                         |   |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|
| 2 Total of line 1, column (d)                                                                                                                                                                                           | 2 |
| 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 |
| 4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5                                                                                                                                          | 4 |
| 5 Multiply line 4 by line 3                                                                                                                                                                                             | 5 |
| 6 Enter 1% of net investment income (1% of Part I, line 27b)                                                                                                                                                            | 6 |
| 7 Add lines 5 and 6                                                                                                                                                                                                     | 7 |
| 8 Enter qualifying distributions from Part XII, line 4<br>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.<br>See the Part VI instructions. | 8 |

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

|                                                                                                                                                                                                                                        |    |        |        |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|--------|--------|
| 1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1.<br>Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions) |    |        |        |
| b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b                                                                                      |    | 1      | 2,587. |
| c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b).                                                                                                              |    |        |        |
| 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)                                                                                                                            |    | 2      | 0.     |
| 3 Add lines 1 and 2                                                                                                                                                                                                                    |    | 3      | 2,587. |
| 4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)                                                                                                                          |    | 4      | 0.     |
| 5 Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0-                                                                                                                                               |    | 5      | 2,587. |
| 6 Credits/Payments:                                                                                                                                                                                                                    |    |        |        |
| a 2016 estimated tax payments and 2015 overpayment credited to 2016                                                                                                                                                                    | 6a | 805.   |        |
| b Exempt foreign organizations - tax withheld at source                                                                                                                                                                                | 6b |        |        |
| c Tax paid with application for extension of time to file (Form 8868)                                                                                                                                                                  | 6c |        |        |
| d Backup withholding erroneously withheld                                                                                                                                                                                              | 6d |        |        |
| 7 Total credits and payments. Add lines 6a through 6d                                                                                                                                                                                  | 7  | 805.   |        |
| 8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached                                                                                                                    | 8  |        |        |
| 9 Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed                                                                                                                                                         | 9  | 1,782. |        |
| 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid                                                                                                                                           | 10 |        |        |
| 11 Enter the amount of line 10 to be. Credited to 2017 estimated tax                                                                                                                                                                   | 11 |        |        |

**Part VII-A Statements Regarding Activities**

|                                                                                                                                                                                                                                                                                                                                                | Yes | No |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?                                                                                                                                                                        |     | X  |
| 1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)?<br>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. |     | X  |
| c Did the foundation file Form 1120-POL for this year?                                                                                                                                                                                                                                                                                         |     | X  |
| d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:<br>(1) On the foundation. \$ 0. (2) On foundation managers. \$ 0.                                                                                                                                                                         |     |    |
| e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0.                                                                                                                                                                                                  |     |    |
| 2 Has the foundation engaged in any activities that have not previously been reported to the IRS?<br>If "Yes," attach a detailed description of the activities.                                                                                                                                                                                | 2   | X  |
| 3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes                                                                                                                   | 3   | X  |
| 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?                                                                                                                                                                                                                                                 | 4a  | X  |
| b If "Yes," has it filed a tax return on Form 990-T for this year?                                                                                                                                                                                                                                                                             | 4b  |    |
| 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?<br>If "Yes," attach the statement required by General Instruction T                                                                                                                                                                           | 5   | X  |
| 6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:<br>• By language in the governing instrument, or<br>• 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   | X  |
| 8a Enter the states to which the foundation reports or with which it is registered (see instructions) KS                                                                                                                                                                                                                                       |     |    |
| 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 "Yes," complete Part XIV                                                                                         | 9   | X  |
| 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses                                                                                                                                                                                                          | 10  | X  |

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**CHARITABLE FOUNDATION**

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**Part VII-A Statements Regarding Activities** (continued)

|                                                                                                                                                                                                                                                                                                                                    | Yes      | No       |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|----------|
| 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)                                                                                                                                         |          | <b>X</b> |
| 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)                                                                                                                                        |          | <b>X</b> |
| 13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?<br>Website address ► <u>N/A</u>                                                                                                                                                                             | <b>X</b> |          |
| 14 The books are in care of ► <u>THE FOUNDATION</u> Telephone no. ► <u>913-341-8500</u><br>Located at ► <u>4801 WEST 110TH STREET, OVERLAND PARK, KS</u> ZIP+4 ► <u>66211</u>                                                                                                                                                      |          |          |
| 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<br>► <u>15</u> <u>N/A</u>                                                                                                                   |          |          |
| 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?<br>See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ► |          | <b>X</b> |

**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.

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No                                                                                                                                                                                                                                                                                                                                                   |           |          |
| (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No                                                                                                                                                                                                                                                                                                                           |           |          |
| (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No                                                                                                                                                                                                                                                                                                                                               |           |          |
| (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <b>STATEMENT IS</b> <input checked="" type="checkbox"/> Yes <input type="checkbox"/> 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)?<br>Organizations relying on a current notice regarding disaster assistance check here ► <input type="checkbox"/>                                                                                                                                                                      | <b>1b</b> | <b>X</b> |
| 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?                                                                                                                                                                                                                                                                                                                    | <b>1c</b> | <b>X</b> |
| 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(i)(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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No<br>If "Yes," list the years ► _____                                                                                                                                                                                                                                                  |           |          |
| b Are there any years listed in 2a for which the foundation is <b>not</b> 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 <b>all</b> years listed, answer "No" and attach statement - see instructions.) <u>N/A</u>                                                                                                                                                                         | <b>2b</b> |          |
| c If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here.<br>► _____                                                                                                                                                                                                                                                                                                                                                                         |           |          |
| 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.) <u>N/A</u> | <b>3b</b> |          |
| 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?                                                                                                                                                                                                                                                                                                                                                                                           | <b>4a</b> | <b>X</b> |
| 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?                                                                                                                                                                                                                                                                          | <b>4b</b> | <b>X</b> |

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**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)?

N/A

5b

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?

N/A

☐ 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?

6b

X

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?

N/A

7b

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

1 List all officers, directors, trustees, foundation managers and their compensation.

| (a) Name and address | (b) Title, and average hours per week devoted to position | (c) Compensation (If not paid, enter -0-) | (d) Contributions to employee benefit plans and deferred compensation | (e) Expense account, other allowances |
|----------------------|-----------------------------------------------------------|-------------------------------------------|-----------------------------------------------------------------------|---------------------------------------|
| SEE STATEMENT 12     |                                                           | 0.                                        | 0.                                                                    | 0.                                    |
|                      |                                                           |                                           |                                                                       |                                       |
|                      |                                                           |                                           |                                                                       |                                       |
|                      |                                                           |                                           |                                                                       |                                       |
|                      |                                                           |                                           |                                                                       |                                       |
|                      |                                                           |                                           |                                                                       |                                       |
|                      |                                                           |                                           |                                                                       |                                       |
|                      |                                                           |                                           |                                                                       |                                       |
|                      |                                                           |                                           |                                                                       |                                       |

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

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

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

0

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

**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 statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

|                                                                                                             | Expenses |
|-------------------------------------------------------------------------------------------------------------|----------|
| 1 N/A -- ALL CHARITABLE CONTRIBUTIONS WERE CASH CONTRIBUTIONS PAID DIRECTLY TO THE CHARITABLE ORGANIZATION. | 0.       |
| 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 lines 1 and 2.

|                                                            | Amount |
|------------------------------------------------------------|--------|
| 1 N/A                                                      |        |
| 2                                                          |        |
| 3 All other program-related investments. See instructions. |        |

Total. Add lines 1 through 3

0.

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

|                                                                                                               |    |            |
|---------------------------------------------------------------------------------------------------------------|----|------------|
| 1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: |    |            |
| a Average monthly fair market value of securities                                                             | 1a | 2,122,763. |
| b Average of monthly cash balances                                                                            | 1b | 905,415.   |
| c Fair market value of all other assets                                                                       | 1c | 101,165.   |
| d Total (add lines 1a, b, and c)                                                                              | 1d | 3,129,343. |
| 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  | 3,129,343. |
| 4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)   | 4  | 46,940.    |
| 5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4        | 5  | 3,082,403. |
| 6 Minimum investment return. Enter 5% of line 5                                                               | 6  | 154,120.   |

**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  | 154,120. |
| 2a Tax on investment income for 2016 from Part VI, line 5                                            | 2a | 2,587.   |
| b Income tax for 2016. (This does not include the tax from Part VI.)                                 | 2b |          |
| c Add lines 2a and 2b                                                                                | 2c | 2,587.   |
| 3 Distributable amount before adjustments. Subtract line 2c from line 1                              | 3  | 151,533. |
| 4 Recoveries of amounts treated as qualifying distributions                                          | 4  | 0.       |
| 5 Add lines 3 and 4                                                                                  | 5  | 151,533. |
| 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  | 151,533. |

**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 | 129,000. |
| 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  | 129,000. |
| 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  | 129,000. |

**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.

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**Part XIII Undistributed Income** (see instructions)

|                                                                                                                                                                                   | (a)<br>Corpus | (b)<br>Years prior to 2015 | (c)<br>2015 | (d)<br>2016 |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|----------------------------|-------------|-------------|
| <b>1</b> Distributable amount for 2016 from Part XI, line 7                                                                                                                       |               |                            |             | 151,533.    |
| <b>2</b> Undistributed income, if any, as of the end of 2016                                                                                                                      |               |                            |             |             |
| <b>a</b> Enter amount for 2015 only                                                                                                                                               |               |                            | 121,724.    |             |
| <b>b</b> Total for prior years:<br>2014 , _____ , _____                                                                                                                           |               | 1,304.                     |             |             |
| <b>3</b> Excess distributions carryover, if any, to 2016:                                                                                                                         |               |                            |             |             |
| <b>a</b> From 2011                                                                                                                                                                |               |                            |             |             |
| <b>b</b> From 2012                                                                                                                                                                |               |                            |             |             |
| <b>c</b> From 2013                                                                                                                                                                |               |                            |             |             |
| <b>d</b> From 2014                                                                                                                                                                |               |                            |             |             |
| <b>e</b> From 2015                                                                                                                                                                |               |                            |             |             |
| <b>f</b> Total of lines 3a through e                                                                                                                                              | 0.            |                            |             |             |
| <b>4</b> Qualifying distributions for 2016 from Part XII, line 4: ▶ \$ 129,000.                                                                                                   |               |                            |             |             |
| <b>a</b> Applied to 2015, but not more than line 2a                                                                                                                               |               |                            | 121,724.    |             |
| <b>b</b> Applied to undistributed income of prior years (Election required - see instructions) *                                                                                  |               | 1,304.                     |             |             |
| <b>c</b> Treated as distributions out of corpus (Election required - see instructions)                                                                                            | 0.            |                            |             |             |
| <b>d</b> Applied to 2016 distributable amount                                                                                                                                     |               |                            |             | 5,972.      |
| <b>e</b> Remaining amount distributed out of corpus                                                                                                                               | 0.            |                            |             |             |
| <b>5</b> Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a) )                                        | 0.            |                            |             | 0.          |
| <b>6</b> Enter the net total of each column as indicated below:                                                                                                                   |               |                            |             |             |
| <b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5                                                                                                                          | 0.            |                            |             |             |
| <b>b</b> Prior years' undistributed income Subtract line 4b from line 2b                                                                                                          |               | 0.                         |             |             |
| <b>c</b> 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.                         |             |             |
| <b>d</b> Subtract line 6c from line 6b. Taxable amount - see instructions                                                                                                         |               | 0.                         |             |             |
| <b>e</b> Undistributed income for 2015. Subtract line 4a from line 2a. Taxable amount - see instr.                                                                                |               |                            | 0.          |             |
| <b>f</b> Undistributed income for 2016. Subtract lines 4d and 5 from line 1 This amount must be distributed in 2017                                                               |               |                            |             | 145,561.    |
| <b>7</b> 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.            |                            |             |             |
| <b>8</b> Excess distributions carryover from 2011 not applied on line 5 or line 7                                                                                                 | 0.            |                            |             |             |
| <b>9</b> Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a                                                                                              | 0.            |                            |             |             |
| <b>10</b> Analysis of line 9.                                                                                                                                                     |               |                            |             |             |
| <b>a</b> Excess from 2012                                                                                                                                                         |               |                            |             |             |
| <b>b</b> Excess from 2013                                                                                                                                                         |               |                            |             |             |
| <b>c</b> Excess from 2014                                                                                                                                                         |               |                            |             |             |
| <b>d</b> Excess from 2015                                                                                                                                                         |               |                            |             |             |
| <b>e</b> Excess from 2016                                                                                                                                                         |               |                            |             |             |

N/A

- ☐ 4942(1)(3) or ☐ 4942(1)(5)

- (4) Gross investment income

[illegible]

## STATEMENT 14

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**Part XV** Supplementary Information (continued)

**3** Grants and Contributions Paid During the Year or Approved for Future Payment

| Recipient<br>Name and address (home or business)                                                       | If recipient is an individual,<br>show any relationship to<br>any foundation manager<br>or substantial contributor | Foundation<br>status of<br>recipient | Purpose of grant or<br>contribution<br>* *                                                                       | Amount             |
|--------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|--------------------------------------|------------------------------------------------------------------------------------------------------------------|--------------------|
| <b>a</b> Paid during the year                                                                          |                                                                                                                    |                                      |                                                                                                                  |                    |
| VILLAGE SHALOM<br>5501 WEST 123RD STREET<br>OVERLAND PARK, KS 66209                                    | N/A                                                                                                                | TAX EXEMPT                           | RELIGIOUS, EDUCATIONAL<br>AND CHARITABLE PURPOSE<br>OF TAX EXEMPT<br>ORGANIZATION                                | 25,000.            |
| JEWISH FAMILY & CHILDREN'S SERVICES<br>OF SAN FRANCISCO<br>P. O. BOX 159004<br>SAN FRANCISCO, CA 94115 | N/A                                                                                                                | TAX EXEMPT                           | LIFELINE FOR CHILDREN,<br>ADULTS, AND FAMILIES<br>FACING PERSONAL CRISES<br>OR CHALLENGES                        | 1,000.             |
| HORIZONS FOUNDATION<br>550 MONTGOMERY STREET, SUITE 700<br>SAN FRANCISCO, CA 94111                     | N/A                                                                                                                | TAX EXEMPT                           | HELP IMPROVE LIVES OF<br>LGBT COMMUNITY<br>RELIGIOUS, EDUCATIONAL<br>AND CHARITABLE PURPOSE<br>OF TAX EXEMPT ORG | 2,000.             |
| SOUTHERN POVERTY LAW CENTER<br>400 WASHINGTON AVENUE<br>MONTGOMERY, AL 36104                           | N/A                                                                                                                | TAX EXEMPT                           | HELP SEEK JUSTICE FOR<br>MOST VULNERABLE<br>MEMBERS OF SOCIETY                                                   | 1,000.             |
| CONGREGATION SHA'AR ZAHAV-THE RAINBOW<br>FUND<br>290 DOLORES STREET<br>SAN FRANCISCO, CA 94103         | N/A                                                                                                                | TAX EXEMPT                           | RELIGIOUS, EDUCATIONAL<br>AND CHARITABLE PURPOSE<br>OF TAX EXEMPT<br>ORGANIZATION                                | 3,500.             |
| <b>Total</b>                                                                                           | SEE CONTINUATION SHEET(S)                                                                                          |                                      |                                                                                                                  | <b>3a</b> 129,000. |
| <b>b</b> Approved for future payment                                                                   |                                                                                                                    |                                      |                                                                                                                  |                    |
| NONE                                                                                                   |                                                                                                                    |                                      |                                                                                                                  |                    |
|                                                                                                        |                                                                                                                    |                                      |                                                                                                                  |                    |
|                                                                                                        |                                                                                                                    |                                      |                                                                                                                  |                    |
|                                                                                                        |                                                                                                                    |                                      |                                                                                                                  |                    |
| <b>Total</b>                                                                                           |                                                                                                                    |                                      |                                                                                                                  | <b>3b</b> 0.       |

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## Part XVI-A

| Unrelated business income |               | Excluded by section 512, 513, or 514 |               | (e)<br>Related or exempt<br>function income |
|---------------------------|---------------|--------------------------------------|---------------|---------------------------------------------|
| (a)<br>Business<br>code   | (b)<br>Amount | (c)<br>Exclu-<br>sion<br>code        | (d)<br>Amount |                                             |
|                           |               |                                      |               |                                             |
|                           |               |                                      |               |                                             |
|                           |               |                                      |               |                                             |
|                           |               |                                      |               |                                             |
|                           |               |                                      |               |                                             |
|                           |               |                                      |               |                                             |
|                           |               |                                      |               |                                             |
|                           |               |                                      |               |                                             |
|                           |               |                                      |               |                                             |
|                           |               | 14                                   | 53,864.       |                                             |
|                           |               |                                      |               |                                             |
|                           |               |                                      |               |                                             |
|                           |               |                                      |               |                                             |
|                           |               | 14                                   | 108.          |                                             |
|                           |               | 18                                   | 98,313.       |                                             |
|                           |               |                                      |               |                                             |
|                           |               |                                      |               |                                             |
|                           |               |                                      |               |                                             |
|                           |               |                                      |               |                                             |
|                           |               |                                      |               |                                             |
|                           |               |                                      |               |                                             |
|                           | 0.            |                                      | 152,285.      | 0                                           |
|                           |               |                                      | 13            | 152,285                                     |

## Part XVI-B

[illegible]

**Part XVII. Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations**

| 1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?                                                                                                                                          |       | Yes | No |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|-----|----|
| a Transfers from the reporting foundation to a noncharitable exempt organization of:                                                                                                                                                                                                                                                                                                           |       |     |    |
| (1) Cash                                                                                                                                                                                                                                                                                                                                                                                       | 1a(1) |     | X  |
| (2) Other assets                                                                                                                                                                                                                                                                                                                                                                               | 1a(2) |     | X  |
| b Other transactions:                                                                                                                                                                                                                                                                                                                                                                          |       |     |    |
| (1) Sales of assets to a noncharitable exempt organization                                                                                                                                                                                                                                                                                                                                     | 1b(1) |     | X  |
| (2) Purchases of assets from a noncharitable exempt organization                                                                                                                                                                                                                                                                                                                               | 1b(2) |     | X  |
| (3) Rental of facilities, equipment, or other assets                                                                                                                                                                                                                                                                                                                                           | 1b(3) |     | X  |
| (4) Reimbursement arrangements                                                                                                                                                                                                                                                                                                                                                                 | 1b(4) |     | X  |
| (5) Loans or loan guarantees                                                                                                                                                                                                                                                                                                                                                                   | 1b(5) |     | X  |
| (6) Performance of services or membership or fundraising solicitations                                                                                                                                                                                                                                                                                                                         | 1b(6) |     | X  |
| c Sharing of facilities, equipment, mailing lists, other assets, or paid employees                                                                                                                                                                                                                                                                                                             | 1c    |     | X  |
| d 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, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. |       |     |    |

[illegible]

**2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?

☐ Yes ☒ No

**b** If "Yes," complete the following schedule.

| (a) Name of organization | (b) Type of organization | (c) Description of relationship |
|--------------------------|--------------------------|---------------------------------|
| N/A                      |                          |                                 |
|                          |                          |                                 |
|                          |                          |                                 |
|                          |                          |                                 |
|                          |                          |                                 |

**Sign  
Here**

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

May the IRS discuss this return with the preparer shown below (see instr.)?

☒ Yes ☐ No

Signature of officer or trustee

13-2-17  
Date

**CO-TRUSTEE**  
Title

**Paid  
Preparer  
Use Only**

|                            |
|----------------------------|
| Print/Type preparer's name |
|----------------------------|

ROBERT J.  
O'HALLORAN

Preparer's signature

|                   |          |
|-------------------|----------|
| ROBERT J. O'HALLO | 03/02/17 |
|-------------------|----------|

Date \_\_\_\_\_

03/02/17

Check ☐ self-employed

|      |
|------|
| PTIN |
|------|

P00218447

|             |                                     |
|-------------|-------------------------------------|
| Firm's name | O' HALLORAN SHERMAN ASSOCIATES, LLC |
|-------------|-------------------------------------|

Firm's EIN ► 20-2069908

Firm's address ► 4801 W. 110TH ST., SUITE 150  
OVERLAND PARK, KS 66211

Phone no. (913) 341-8500

Form **990-PF** (2016)

**Schedule B**(Form 990, 990-EZ,  
or 990-PF)Department of the Treasury  
Internal Revenue Service**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](http://www.irs.gov/form990).

OMB No 1545-0047

**2016**

Name of the organization

NORMAN & ELAINE POLSKY FAMILY  
CHARITABLE FOUNDATION

Employer identification number

48-1232337

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☐

527 political organization

Form 990-PF

☒

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 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 33 1/3% 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. 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 that isn't covered by the General Rule and/or the 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).

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2016)

|                                                                                            |                                                     |
|--------------------------------------------------------------------------------------------|-----------------------------------------------------|
| Name of organization<br><b>NORMAN &amp; ELAINE POLSKY FAMILY<br/>CHARITABLE FOUNDATION</b> | Employer identification number<br><b>48-1232337</b> |
|--------------------------------------------------------------------------------------------|-----------------------------------------------------|

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

| (a)<br>No. | (b)<br>Name, address, and ZIP + 4                                                                                         | (c)<br>Total contributions               | (d)<br>Type of contribution                                                                                                                                         |
|------------|---------------------------------------------------------------------------------------------------------------------------|------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <u>1</u>   | <u>POLSKY CHARITABLE REMAINDER UNITRUST</u><br><u>4801 WEST 110TH STREET, SUITE 150</u><br><u>OVERLAND PARK, KS 66211</u> | \$ <u>27,884.</u>                        | Person <input checked="" type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II for noncash contributions.) |
| <u>2</u>   | <u>POLSKY CHARITABLE REMAINDER UNITRUST</u><br><u>4801 WEST 110TH STREET, SUITE 150</u><br><u>OVERLAND PARK, KS 66211</u> | \$ <u>909,406.</u><br><b>(TAX BASIS)</b> | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input checked="" type="checkbox"/><br>(Complete Part II for noncash contributions)  |
| <u>3</u>   | <u>POLSKY CHARITABLE REMAINDER UNITRUST</u><br><u>4801 WEST 110TH STREET, SUITE 150</u><br><u>OVERLAND PARK, KS 66211</u> | \$ <u>211.</u>                           | Person <input checked="" type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II for noncash contributions)  |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4                                                                                         | (c)<br>Total contributions               | (d)<br>Type of contribution                                                                                                                                         |
|            |                                                                                                                           | \$                                       | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II for noncash contributions)             |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4                                                                                         | (c)<br>Total contributions               | (d)<br>Type of contribution                                                                                                                                         |
|            |                                                                                                                           | \$                                       | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II for noncash contributions.)            |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4                                                                                         | (c)<br>Total contributions               | (d)<br>Type of contribution                                                                                                                                         |
|            |                                                                                                                           | \$                                       | Person <input type="checkbox"/><br>Payroll <input type="checkbox"/><br>Noncash <input type="checkbox"/><br>(Complete Part II for noncash contributions)             |

Name of organization

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**Part II Noncash Property** (See instructions) Use duplicate copies of Part II if additional space is needed.

| (a)<br>No.<br>from<br>Part I | (b)<br>Description of noncash property given        | (c)<br>FMV (or estimate)<br>(See instructions) | (d)<br>Date received |
|------------------------------|-----------------------------------------------------|------------------------------------------------|----------------------|
| 2                            | 2113.048 SHS DFA INTERNATIONAL SMALL<br>CAP VALUE I | \$ 35,732.                                     | 02/24/16             |
| 2                            | 2780.701 SHS DFA US LARGE CAP VALUE I               | \$ 79,194.                                     | 02/24/16             |
| 2                            | 1325.538 SHS DFA US SMALL CAP                       | \$ 34,822.                                     | 02/24/16             |
| 2                            | 5109.854 SHS DELAWARE VALUE INSTL                   | \$ 85,437.                                     | 02/24/16             |
| 2                            | 4036.048 SHS DODGE & COX INCOME FUND                | \$ 53,558.                                     | 02/24/16             |
| 2                            | 4994.458 SHS DOUBLELINE TOTAL RETURN<br>BOND        | \$ 54,539.                                     | 02/24/16             |

|                                                                                            |                                                     |
|--------------------------------------------------------------------------------------------|-----------------------------------------------------|
| Name of organization<br><b>NORMAN &amp; ELAINE POLSKY FAMILY<br/>CHARITABLE FOUNDATION</b> | Employer identification number<br><b>48-1232337</b> |
|--------------------------------------------------------------------------------------------|-----------------------------------------------------|

**Part II Noncash Property** (See instructions) Use duplicate copies of Part II if additional space is needed

| (a)<br>No.<br>from<br>Part I | (b)<br>Description of noncash property given                | (c)<br>FMV (or estimate)<br>(See instructions) | (d)<br>Date received |
|------------------------------|-------------------------------------------------------------|------------------------------------------------|----------------------|
| <u>2</u>                     | <u>4780.06 SHS GOLDMAN SACHS HIGH YIELD</u>                 | \$ <u>27,677.</u>                              | <u>02/24/16</u>      |
| <u>2</u>                     | <u>2020.826 SHS PALMER SQUARE INCOME PLUS</u>               | \$ <u>18,147.</u>                              | <u>02/24/16</u>      |
| <u>2</u>                     | <u>8461.763 SHS IVY INTERNATIONAL CORE EQUITY</u>           | \$ <u>127,011.</u>                             | <u>02/24/16</u>      |
| <u>2</u>                     | <u>2467.378 SHS JP MORGAN LARGE CAP GROWTH SELECT</u>       | \$ <u>77,303.</u>                              | <u>02/24/16</u>      |
| <u>2</u>                     | <u>2021.824 SHS GREAT LAKES TORTOISE MLP &amp; PIPELINE</u> | \$ <u>18,762.</u>                              | <u>02/24/16</u>      |
| <u>2</u>                     | <u>1045.717 SHS OPPENHEIMER DEVELOPING MARKETS Y</u>        | \$ <u>29,134.</u>                              | <u>02/24/16</u>      |

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**Part II Noncash Property** (See instructions) Use duplicate copies of Part II if additional space is needed.

| (a)<br>No.<br>from<br>Part I | (b)<br>Description of noncash property given              | (c)<br>FMV (or estimate)<br>(See instructions) | (d)<br>Date received |
|------------------------------|-----------------------------------------------------------|------------------------------------------------|----------------------|
| 2                            | 3015.816 SHS PRINCIPAL PREFERRED<br>SECURITIES            | \$ 29,766.                                     | 02/24/16             |
| 2                            | 632.257 SHS T ROWE PRICE MID-CAP<br>GROWTH TRADE          | \$ 42,519.                                     | 02/24/16             |
| 2                            | 279.329 SHS VANGUARD REIT INDEX ADM                       | \$ 30,056.                                     | 02/24/16             |
| 2                            | 4751.223 SHS VANGUARD INTERM TERM BOND<br>INDEX ADM TRADE | \$ 54,782.                                     | 02/24/16             |
| 2                            | 1644.478 SHS VANGUARD GROWTH INDEX ADM<br>TRADE           | \$ 83,589.                                     | 02/24/16             |
|                              |                                                           | \$                                             |                      |

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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 info once) ▶ \$

Use duplicate copies of Part III if additional space is needed.

| (a) No.<br>from<br>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 |
|                           |                                         |                 |                                          |
|                           |                                         |                 |                                          |
|                           |                                         |                 |                                          |
|                           | (e) Transfer of gift                    |                 |                                          |
|                           | Transferee's name, address, and ZIP + 4 |                 | Relationship of transferor to transferee |
|                           |                                         |                 |                                          |
|                           |                                         |                 |                                          |
|                           |                                         |                 |                                          |
|                           | (e) Transfer of gift                    |                 |                                          |
|                           | Transferee's name, address, and ZIP + 4 |                 | Relationship of transferor to transferee |
|                           |                                         |                 |                                          |
|                           |                                         |                 |                                          |
|                           |                                         |                 |                                          |
|                           | (e) Transfer of gift                    |                 |                                          |
|                           | Transferee's name, address, and ZIP + 4 |                 | Relationship of transferor to transferee |
|                           |                                         |                 |                                          |
|                           |                                         |                 |                                          |
|                           |                                         |                 |                                          |
|                           | (e) Transfer of gift                    |                 |                                          |
|                           | Transferee's name, address, and ZIP + 4 |                 | Relationship of transferor to transferee |
|                           |                                         |                 |                                          |
|                           |                                         |                 |                                          |
|                           |                                         |                 |                                          |

**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,<br>2-story brick warehouse; or common stock, 200 shs. MLC Co. |                                                  | (b) How acquired<br>P - Purchase<br>D - Donation | (c) Date acquired<br>(mo., day, yr.) | (d) Date sold<br>(mo., day, yr.) |
|--------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------|--------------------------------------------------|--------------------------------------|----------------------------------|
| 1a                                                                                                                                   | 1504.28 SHS GOLDMAN SACHS HIGH YIELD INST        | P                                                | 11/02/11                             | 10/06/16                         |
| b                                                                                                                                    | 3436.328 SHS PRINCIPAL PREFERRED SECURITIES INST | P                                                | 07/27/15                             | 07/18/16                         |
| c                                                                                                                                    | 179.894 SHS PALMER SQUARE INCOME PLUS            | P                                                | 12/01/14                             | 07/18/16                         |
| d                                                                                                                                    | 125 SHS CAPITAL ONE FINANCIAL CORP PREF SHARE    | P                                                | 07/19/16                             | 07/26/16                         |
| e                                                                                                                                    | 110 SHS BANK OF NEW YORK MELLON CORP             | P                                                | 07/19/16                             | 08/03/16                         |
| f                                                                                                                                    | 57 SHS BANK OF NEW YORK MELLON CORP              | P                                                | VARIOUS                              | 08/29/16                         |
| g                                                                                                                                    | 38 SHS BANK OF NEW YORK MELLON CORP              | P                                                | 07/19/16                             | 08/30/16                         |
| h                                                                                                                                    | 55 SHS BANK OF NEW YORK MELLON CORP              | P                                                | 07/19/16                             | 09/06/16                         |
| i                                                                                                                                    | 120 SHS US BANCORP                               | P                                                | VARIOUS                              | 09/14/16                         |
| j                                                                                                                                    | 60 SHS US BANCORP                                | P                                                | 07/19/16                             | 09/14/16                         |
| k                                                                                                                                    | 3473.877 SHS GOLDMAN SACHS HIGH YIELD            | D                                                | 02/24/16                             | 10/06/16                         |
| l                                                                                                                                    | 135 SHS DISCOVER FINANCIAL SERVICES              | P                                                | VARIOUS                              | 11/03/16                         |
| m                                                                                                                                    | 70 SHS BANK OF AMERICA CORP PFD                  | P                                                | VARIOUS                              | 11/04/16                         |
| n                                                                                                                                    | 170 SHS SCE TR PFD                               | P                                                | 07/19/16                             | 08/04/16                         |
| o                                                                                                                                    | 95 SHS SCE TR PFD                                | P                                                | VARIOUS                              | 08/10/16                         |

| (e) Gross sales price | (f) Depreciation allowed<br>(or allowable) | (g) Cost or other basis<br>plus expense of sale | (h) Gain or (loss)<br>(e) plus (f) minus (g) |
|-----------------------|--------------------------------------------|-------------------------------------------------|----------------------------------------------|
| a 9,763.              |                                            | 10,103.                                         | <340.>                                       |
| b 35,051.             |                                            | 35,291.                                         | <240.>                                       |
| c 1,700.              |                                            | 1,785.                                          | <85.>                                        |
| d 3,257.              |                                            | 3,322.                                          | <65.>                                        |
| e 2,898.              |                                            | 2,924.                                          | <26.>                                        |
| f 1,511.              |                                            | 1,525.                                          | <14.>                                        |
| g 1,009.              |                                            | 1,010.                                          | <1.>                                         |
| h 1,439.              |                                            | 1,462.                                          | <23.>                                        |
| i 3,198.              |                                            | 3,275.                                          | <77.>                                        |
| j 1,598.              |                                            | 1,631.                                          | <33.>                                        |
| k 22,545.             |                                            | 24,393.                                         | <1,848.>                                     |
| l 3,504.              |                                            | 3,618.                                          | <114.>                                       |
| m 1,864.              |                                            | 1,951.                                          | <87.>                                        |
| n 4,435.              |                                            | 4,497.                                          | <62.>                                        |
| o 2,485.              |                                            | 2,513.                                          | <28.>                                        |

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

| (i) F.M.V. as of 12/31/69 | (j) Adjusted basis<br>as of 12/31/69 | (k) Excess of col. (i)<br>over col. (j), if any | (l) Losses (from col. (h))<br>Gains (excess of col. (h) gain over col. (k),<br>but not less than "-0-") |
|---------------------------|--------------------------------------|-------------------------------------------------|---------------------------------------------------------------------------------------------------------|
| a                         |                                      |                                                 | <340.>                                                                                                  |
| b                         |                                      |                                                 | <240.>                                                                                                  |
| c                         |                                      |                                                 | <85.>                                                                                                   |
| d                         |                                      |                                                 | <65.>                                                                                                   |
| e                         |                                      |                                                 | <26.>                                                                                                   |
| f                         |                                      |                                                 | <14.>                                                                                                   |
| g                         |                                      |                                                 | <1.>                                                                                                    |
| h                         |                                      |                                                 | <23.>                                                                                                   |
| i                         |                                      |                                                 | <77.>                                                                                                   |
| j                         |                                      |                                                 | <33.>                                                                                                   |
| k                         |                                      |                                                 | <1,848.>                                                                                                |
| l                         |                                      |                                                 | <114.>                                                                                                  |
| m                         |                                      |                                                 | <87.>                                                                                                   |
| n                         |                                      |                                                 | <62.>                                                                                                   |
| o                         |                                      |                                                 | <28.>                                                                                                   |

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7  
If (loss), enter "-0-" in Part I, line 7 }

2

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):  
If gain, also enter in Part I, line 8, column (c).  
If (loss), enter "-0-" in Part I, line 8

3

**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,<br>2-story brick warehouse; or common stock, 200 shs. MLC Co. |                                                    | (b) How acquired<br>P - Purchase<br>D - Donation | (c) Date acquired<br>(mo., day, yr.) | (d) Date sold<br>(mo., day, yr.) |
|--------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------|--------------------------------------------------|--------------------------------------|----------------------------------|
| 1a                                                                                                                                   | 90 SHS GOLDMAN SACHS GROUP INC                     | P                                                | VARIOUS                              | 08/17/16                         |
| b                                                                                                                                    | 13.8 ACRES VACANT GROUND-119TH ST OLATHE, KS       | D                                                | 10/05/11                             | 02/03/16                         |
| c                                                                                                                                    | 1574.803 SHS GOLDMAN SACHS HIGH YIELD              | P                                                | 08/04/16                             | 10/06/16                         |
| d                                                                                                                                    | 3015.816 SHS PRINCIPAL PREFERRED SECURITIES INC    | D                                                | 02/24/16                             | 07/18/16                         |
| e                                                                                                                                    | 1306.183 SHS GOLDMAN SACHS HIGH YIELD              | D                                                | 02/24/16                             | 10/06/16                         |
| f                                                                                                                                    | 3730.408 SHS GOLDMAN SACHS HIGH YIELD              | P                                                | VARIOUS                              | 07/18/16                         |
| g                                                                                                                                    | ADDITIONAL GAIN-BASIS ADJ GOLDMAN SACHS HIGH YIELD | P                                                | VARIOUS                              | 10/06/16                         |
| h                                                                                                                                    | 632.257 SHS T ROWE PRICE MID-CAP GROWTH            | D                                                | 02/24/16                             | 04/05/16                         |
| i                                                                                                                                    | 702.959 SHS T ROWE PRICE MID-CAP GROWTH            | P                                                | 01/22/15                             | 04/05/16                         |
| j                                                                                                                                    | CAPITAL GAINS DIVIDENDS                            |                                                  |                                      |                                  |
| k                                                                                                                                    |                                                    |                                                  |                                      |                                  |
| l                                                                                                                                    |                                                    |                                                  |                                      |                                  |
| m                                                                                                                                    |                                                    |                                                  |                                      |                                  |
| n                                                                                                                                    |                                                    |                                                  |                                      |                                  |
| o                                                                                                                                    |                                                    |                                                  |                                      |                                  |

| (e) Gross sales price | (f) Depreciation allowed<br>(or allowable) | (g) Cost or other basis<br>plus expense of sale | (h) Gain or (loss)<br>(e) plus (f) minus (g) |
|-----------------------|--------------------------------------------|-------------------------------------------------|----------------------------------------------|
| a 2,327.              |                                            | 2,387.                                          | <60.>                                        |
| b 1,200,000.          |                                            | 1,126,997.                                      | 73,003.                                      |
| c 10,220.             |                                            | 10,000.                                         | 220.                                         |
| d 30,761.             |                                            | 30,972.                                         | <211.>                                       |
| e 8,477.              |                                            | 9,172.                                          | <695.>                                       |
| f 23,800.             |                                            | 26,445.                                         | <2,645.>                                     |
| g 158.                |                                            |                                                 | 158.                                         |
| h 47,780.             |                                            | 47,780.                                         | 0.                                           |
| i 53,123.             |                                            | 53,123.                                         | 0.                                           |
| j 31,586.             |                                            |                                                 | 31,586.                                      |
| k                     |                                            |                                                 |                                              |
| l                     |                                            |                                                 |                                              |
| m                     |                                            |                                                 |                                              |
| n                     |                                            |                                                 |                                              |
| o                     |                                            |                                                 |                                              |

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

| (i) F.M.V. as of 12/31/69 | (j) Adjusted basis<br>as of 12/31/69 | (k) Excess of col. (i)<br>over col. (j), if any | (l) Losses (from col. (h))<br>Gains (excess of col. (h) gain over col. (k),<br>but not less than "-0-") |
|---------------------------|--------------------------------------|-------------------------------------------------|---------------------------------------------------------------------------------------------------------|
| a                         |                                      |                                                 | <60.>                                                                                                   |
| b                         |                                      |                                                 | 73,003.                                                                                                 |
| c                         |                                      |                                                 | 220.                                                                                                    |
| d                         |                                      |                                                 | <211.>                                                                                                  |
| e                         |                                      |                                                 | <695.>                                                                                                  |
| f                         |                                      |                                                 | <2,645.>                                                                                                |
| g                         |                                      |                                                 | 158.                                                                                                    |
| h                         |                                      |                                                 | 0.                                                                                                      |
| i                         |                                      |                                                 | 0.                                                                                                      |
| j                         |                                      |                                                 | 31,586.                                                                                                 |
| k                         |                                      |                                                 |                                                                                                         |
| l                         |                                      |                                                 |                                                                                                         |
| m                         |                                      |                                                 |                                                                                                         |
| n                         |                                      |                                                 |                                                                                                         |
| o                         |                                      |                                                 |                                                                                                         |

|                                                                                                                                                                                     |   |         |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|---------|
| 2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7<br>If (loss), enter "-0-" in Part I, line 7 }                                               | 2 | 98,313. |
| 3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6).<br>If gain, also enter in Part I, line 8, column (c).<br>If (loss), enter "-0-" in Part I, line 8 } | 3 | N/A     |

**NORMAN & ELAINE POLSKY FAMILY  
CHARITABLE FOUNDATION**

48-1232337

**Part XV Supplementary Information**

**3 Grants and Contributions Paid During the Year (Continuation)**

| Recipient<br>Name and address (home or business)                                                                     | If recipient is an individual,<br>show any relationship to<br>any foundation manager<br>or substantial contributor | Foundation<br>status of<br>recipient | Purpose of grant or<br>contribution                                               | Amount         |
|----------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|--------------------------------------|-----------------------------------------------------------------------------------|----------------|
| JEWISH FEDERATION OF GREATER KANSAS<br>CITY<br>5801 WEST 115TH STREET, SUITE 201<br>OVERLAND PARK, KS 66209          | N/A                                                                                                                | TAX EXEMPT                           | RELIGIOUS, EDUCATIONAL<br>AND CHARITABLE PURPOSE<br>OF TAX EXEMPT<br>ORGANIZATION | 10,500.        |
| THE FRESH AIR FUND<br>633 THIRD AVENUE, 14TH FLOOR<br>NEW YORK, NY 10017                                             | N/A                                                                                                                | TAX EXEMPT                           | PROVIDE FREE SUMMER<br>EXPERIENCES FOR LOW<br>INCOME CHILDREN                     | 8,000.         |
| CENTER FOR THE PRACTICE OF ZEN<br>BUDDHIST MEDITATION<br>P O BOX 1756<br>MURPHYS, CA 95247                           | N/A                                                                                                                | TAX EXEMPT                           | ZEN MONASTERY PEACE<br>CENTER<br>CHARITABLE<br>CONTRIBUTION                       | 2,500.         |
| CONGREGATION BETH SHALOM-RACHEL &<br>ISADORE POLSKY FUND<br>14200 LAMAR AVENUE<br>OVERLAND PARK, KS 66223            | N/A                                                                                                                | TAX EXEMPT                           | RELIGIOUS, EDUCATIONAL<br>AND CHARITABLE PURPOSE<br>OF TAX EXEMPT<br>ORGANIZATION | 1,500.         |
| GREATER KANSAS CITY CHAPTER OF<br>HADASSAH<br>3909 WEST 101ST TERRACE<br>OVERLAND PARK, KS 66207                     | N/A                                                                                                                | TAX EXEMPT                           | RELIGIOUS, EDUCATIONAL<br>AND CHARITABLE PURPOSE<br>OF TAX EXEMPT<br>ORGANIZATION | 1,000.         |
| HEALTHIER FOUNDATION<br>1404 LYON STREET<br>SAN FRANCISCO, CA 94115                                                  | N/A                                                                                                                | TAX EXEMPT                           | YOUTH DEVELOPMENT IN<br>SAN FRANCISCO AREA                                        | 2,000.         |
| MIDWEST CENTER FOR HOLOCAUST<br>EDUCATION<br>5801 WEST 115TH STREET, SUITE 106<br>OVERLAND PARK, KS 66211            | N/A                                                                                                                | TAX EXEMPT                           | RELIGIOUS, EDUCATIONAL<br>AND CHARITABLE PURPOSE<br>OF TAX EXEMPT<br>ORGANIZATION | 2,000.         |
| HEARTLAND HONOR FLIGHT<br>P. O. BOX 12047<br>KANSAS CITY, MO 64152                                                   | N/A                                                                                                                | TAX EXEMPT                           | HONOR AMERICAN<br>VETERANS                                                        | 8,000.         |
| JAMPOLSKY OUTREACH FOUNDATION --<br>ATTITUDINAL HEALING INTERNATIONAL<br>3001 BRIDGEWAY, #36B<br>SAUSALITO, CA 94965 | N/A                                                                                                                | TAX EXEMPT                           | CENTER FOR ATTITUDINAL<br>HEALING                                                 | 2,500.         |
| JEWISH COMMUNITY FOUNDATION<br>5801 WEST 115TH STREET, SUITE 103<br>OVERLAND PARK, KS 66211                          | N/A                                                                                                                | TAX EXEMPT                           | RELIGIOUS, EDUCATIONAL<br>AND CHARITABLE PURPOSE<br>OF TAX EXEMPT<br>ORGANIZATION | 15,000.        |
| <b>Total from continuation sheets</b>                                                                                |                                                                                                                    |                                      |                                                                                   | <b>96,500.</b> |

**NORMAN & ELAINE POLSKY FAMILY  
CHARITABLE FOUNDATION**

48-1232337

**Part XV Supplementary Information**

**3 Grants and Contributions Paid During the Year (Continuation)**

| Recipient<br>Name and address (home or business)                                            | If recipient is an individual,<br>show any relationship to<br>any foundation manager<br>or substantial contributor | Foundation<br>status of<br>recipient | Purpose of grant or<br>contribution                                                                              | Amount |
|---------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|--------------------------------------|------------------------------------------------------------------------------------------------------------------|--------|
| ASPEN T.R.E.E.<br>P.O BOX 8064<br>ASPEN, CO 81612                                           | N/A                                                                                                                | TAX EXEMPT                           | SUPPORT STUDENT<br>CENTERED COOPERATIVE<br>FARM                                                                  | 1,500. |
| REBUILDING TOGETHER NEW ORLEANS<br>923 TCHOUPITOUHAS STREET<br>NEW ORLEANS, LA 70130        | N/A                                                                                                                | TAX EXEMPT                           | TOOLS, LUMBER FOR<br>BUILDING HOMES                                                                              | 2,500. |
| BURNS RECOVERED SUPPORT GROUP<br>11710 ADMINISTRATION DRIVE, SUITE 2B<br>ST LOUIS, MO 63146 | N/A                                                                                                                | TAX EXEMPT                           | MISSOURI CHILDREN'S<br>BURN CAMP                                                                                 | 2,500. |
| RIDHWAN FOUNDATION<br>P. O. BOX 10173<br>BERKELEY, CA 94709                                 | N/A                                                                                                                | TAX EXEMPT                           | PROVIDE TEACHER<br>TRAINING SUPPORT                                                                              | 2,500. |
| JEWISH ROCK RADIO<br>14560 WHITE BURCH VALLEY LANE<br>CHESTERFIELD, MO 63017                | N/A                                                                                                                | TAX EXEMPT                           | PUBLIC JEWISH RADIO<br>RELIGIOUS, EDUCATIONAL<br>AND CHARITABLE PURPOSE<br>OF TAX EXEMPT<br>ORGANIZATION         | 5,500. |
| UNIVERSITY OF KANSAS HILLEL<br>722 NEW HAMPSHIRE STREET<br>LAWRENCE, KS 66044               | N/A                                                                                                                | TAX EXEMPT                           | RELIGIOUS, EDUCATIONAL<br>AND CHARITABLE PURPOSE<br>OF TAX EXEMPT<br>ORGANIZATION                                | 3,000. |
| JEWISH FAMILY SERVICES<br>5801 WEST 115TH STREET, SUITE 103<br>OVERLAND PARK, KS 66211      | N/A                                                                                                                | TAX EXEMPT                           | JEWISH CHAPLAINCY<br>PROGRAM                                                                                     | 2,000. |
| URBAN RANGER<br>5908 SWOPE PARKWAY<br>KANSAS CITY, MO 64130                                 | N/A                                                                                                                | TAX EXEMPT                           | PROVIDE OPPORTUNITIES<br>FOR YOUNG MEN IN URBAN<br>CITY                                                          | 1,000. |
| NATIONAL COUNCIL OF JEWISH WOMEN<br>5311 WEST 75TH STEET<br>PRAIRIE VILLAGE, KS 66208       | N/A                                                                                                                | TAX EXEMPT                           | SOCIAL JUSTICE BY<br>IMPROVING THE QUALITY<br>OF LIFE FOR WOMEN,<br>CHILDREN AND FAMILIES<br>AND BY SAFEGUARDING | 4,500. |
| REACHING OUT FROM WITHIN<br>P O BOX 8527<br>PRAIRIE VILLAGE, KS 66208                       | N/A                                                                                                                | TAX EXEMPT                           | PRISON REHABILITATION<br>PROGRAMS FOR INMATES<br>WHO WANT TO MAKE<br>LASTING CHANGES IN<br>THEIR BEHAVIOR        | 1,000. |
| <b>Total from continuation sheets</b>                                                       |                                                                                                                    |                                      |                                                                                                                  |        |

**NORMAN & ELAINE POLSKY FAMILY  
CHARITABLE FOUNDATION**

48-1232337

**Part XV Supplementary Information**

| 3 Grants and Contributions Paid During the Year (Continuation)                                           |                                                                                                           |                                |                                                                                           |        |
|----------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|--------------------------------|-------------------------------------------------------------------------------------------|--------|
| 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)                                                                      |                                                                                                           |                                |                                                                                           |        |
| JEWISH FEDERATION OF GREATER KANSAS CITY<br>5801 WEST 115TH STREET, SUITE 201<br>OVERLAND PARK, KS 66209 | N/A                                                                                                       | TAX EXEMPT                     | LEADERSHIP DEVELOPMENT INITIATIVE                                                         | 3,000. |
| CONGREGATION BETH SHALOM<br>14200 LAMAR AVENUE<br>OVERLAND PARK, KS 66233                                | N/A                                                                                                       | TAX EXEMPT                     | RELIGIOUS, EDUCATIONAL AND CHARITABLE PURPOSE OF TAX EXEMPT ORGANIZATION                  | 4,500. |
| METROPOLITAN ENSEMBLE THEATER<br>3614 MAIN STREET<br>KANSAS CITY, MO 64111                               | N/A                                                                                                       | TAX EXEMPT                     | PERFORMING ARTS THEATER COMMITTED TO THE ART OF THE STORY TO DEEPEN UNDERSTANDING OF EACH | 7,000. |
| JEWISH FEDERATION OF GREATER KANSAS CITY<br>5801 WEST 115TH STREET, SUITE 201<br>OVERLAND PARK, KS 66209 | N/A                                                                                                       | TAX EXEMPT                     | LIBRARY AND RELIGIOUS, EDUCATIONAL AND CHARITABLE PURPOSE OF TAX EXEMPT ORGANIZATION      | 3,000. |
|                                                                                                          |                                                                                                           |                                |                                                                                           |        |
|                                                                                                          |                                                                                                           |                                |                                                                                           |        |
|                                                                                                          |                                                                                                           |                                |                                                                                           |        |
|                                                                                                          |                                                                                                           |                                |                                                                                           |        |
|                                                                                                          |                                                                                                           |                                |                                                                                           |        |
|                                                                                                          |                                                                                                           |                                |                                                                                           |        |
|                                                                                                          |                                                                                                           |                                |                                                                                           |        |
|                                                                                                          |                                                                                                           |                                |                                                                                           |        |
|                                                                                                          |                                                                                                           |                                |                                                                                           |        |
| Total from continuation sheets                                                                           |                                                                                                           |                                |                                                                                           |        |

Part XV Supplementary Information

3a Grants and Contributions Paid During the Year Continuation of Purpose of Grant or Contribution

NAME OF RECIPIENT - JEWISH FAMILY & CHILDREN'S SERVICES OF SAN FRANCISCO

LIFELINE FOR CHILDREN, ADULTS, AND FAMILIES FACING PERSONAL CRISES OR  
CHALLENGES

NAME OF RECIPIENT - HEALTHIER FOUNDATION

YOUTH DEVELOPMENT IN SAN FRANCISCO AREA

NAME OF RECIPIENT - NATIONAL COUNCIL OF JEWISH WOMEN

SOCIAL JUSTICE BY IMPROVING THE QUALITY OF LIFE FOR WOMEN, CHILDREN AND  
FAMILIES AND BY SAFEGUARDING INDIVIDUAL RIGHTS AND FREEDOMS

NAME OF RECIPIENT - METROPOLITAN ENSEMBLE THEATER

PERFORMING ARTS THEATER COMMITTED TO THE ART OF THE STORY TO DEEPEN  
UNDERSTANDING OF EACH OTHER AND OURSELVES

| FORM 990-PF              |                 | DIVIDENDS AND INTEREST FROM SECURITIES |                             |                                   | STATEMENT                     | 1 |
|--------------------------|-----------------|----------------------------------------|-----------------------------|-----------------------------------|-------------------------------|---|
| SOURCE                   | GROSS<br>AMOUNT | CAPITAL<br>GAINS<br>DIVIDENDS          | (A)<br>REVENUE<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME |   |
| MIDWEST TRUST<br>COMPANY | 85,450.         | 31,586.                                | 53,864.                     | 53,864.                           |                               |   |
| TO PART I, LINE 4        | 85,450.         | 31,586.                                | 53,864.                     | 53,864.                           |                               |   |

| FORM 990-PF                                                                    |  | OTHER INCOME                |                                   |                               | STATEMENT | 2 |
|--------------------------------------------------------------------------------|--|-----------------------------|-----------------------------------|-------------------------------|-----------|---|
| DESCRIPTION                                                                    |  | (A)<br>REVENUE<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME |           |   |
| MISCELLANEOUS INCOME-REFUND OF<br>INSURANCE EXP ON LAND HELD FOR<br>INVESTMENT |  | 108.                        | 108.                              |                               |           |   |
| TOTAL TO FORM 990-PF, PART I, LINE 11                                          |  | 108.                        | 108.                              |                               |           |   |

| FORM 990-PF                                                               |  | LEGAL FEES                   |                                   |                               | STATEMENT                     | 3 |
|---------------------------------------------------------------------------|--|------------------------------|-----------------------------------|-------------------------------|-------------------------------|---|
| DESCRIPTION                                                               |  | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |   |
| PROFESSIONAL FEES-LEGAL<br>FEES RELATED TO SALE OF<br>INVESTMENT PROPERTY |  | 1,457.                       | 1,457.                            |                               | 0.                            |   |
| TO FM 990-PF, PG 1, LN 16A                                                |  | 1,457.                       | 1,457.                            |                               | 0.                            |   |

| FORM 990-PF                                                                     | ACCOUNTING FEES              |                                   |                               | STATEMENT 4                   |
|---------------------------------------------------------------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| DESCRIPTION                                                                     | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |
| O'HALLORAN SHERMAN<br>ASSOCIATES, LLC --<br>PREPARATION OF 2015<br>FORM 990-PF. | 3,310.<br>0.                 | 3,310.<br>0.                      |                               | 0.<br>0.                      |
| TO FORM 990-PF, PG 1, LN 16B                                                    | 3,310.                       | 3,310.                            |                               | 0.                            |

| FORM 990-PF                      | OTHER PROFESSIONAL FEES      |                                   |                               | STATEMENT 5                   |
|----------------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| DESCRIPTION                      | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |
| INVESTMENT FEES-MIDWEST<br>TRUST | 14,173.                      | 14,173.                           |                               | 0.                            |
| TO FORM 990-PF, PG 1, LN 16C     | 14,173.                      | 14,173.                           |                               | 0.                            |

| FORM 990-PF                                      | TAXES                        |                                   |                               | STATEMENT 6                   |
|--------------------------------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| DESCRIPTION                                      | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |
| FOREIGN TAXES ON<br>INVESTMENT INCOME            | 844.                         | 844.                              |                               | 0.                            |
| REAL ESTATE TAXES ON LAND<br>HELD FOR INVESTMENT | 460.                         | 460.                              |                               | 0.                            |
| EXCISE TAXES ON NET<br>INVESTMENT INCOME         | 891.                         | 0.                                |                               | 0.                            |
| TO FORM 990-PF, PG 1, LN 18                      | 2,195.                       | 1,304.                            |                               | 0.                            |

| FORM 990-PF                       | OTHER EXPENSES               |                                   |                               | STATEMENT                     | 7 |
|-----------------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|---|
| DESCRIPTION                       | (A)<br>EXPENSES<br>PER BOOKS | (B)<br>NET INVEST-<br>MENT INCOME | (C)<br>ADJUSTED<br>NET INCOME | (D)<br>CHARITABLE<br>PURPOSES |   |
| MISCELLANEOUS<br>EXPENSE-SUPPLIES | 17.                          | 17.                               |                               | 0.                            |   |
| MISCELLANEOUS<br>EXPENSE-POSTAGE  | 23.                          | 23.                               |                               | 0.                            |   |
| TO FORM 990-PF, PG 1, LN 23       | 40.                          | 40.                               |                               | 0.                            |   |

| FORM 990-PF                                          | CORPORATE STOCK |                      | STATEMENT | 8 |
|------------------------------------------------------|-----------------|----------------------|-----------|---|
| DESCRIPTION                                          | BOOK VALUE      | FAIR MARKET<br>VALUE |           |   |
| 65 SHS AEGON NV PERP CAP SECS                        | 1,710.          | 1,628.               |           |   |
| 260 SHS ALLSTATE CORP DEP PFD                        | 7,377.          | 6,726.               |           |   |
| 125 SHS ARES MANAGEMENT LP PREF SHARE                | 3,218.          | 3,131.               |           |   |
| 300 SHS BB & T CORP PFD                              | 7,737.          | 6,828.               |           |   |
| 60 SHS BANC OF CALIFORNIA INC PRD                    | 1,629.          | 1,492.               |           |   |
| 110 SHS BANK OF AMERICA CORP                         | 2,873.          | 2,739.               |           |   |
| 75 SHS BANK OF AMERICA CORP PFD                      | 1,946.          | 1,893.               |           |   |
| 220 SHS CHS INC CLASS B SER 4 PFD                    | 6,435.          | 5,971.               |           |   |
| 165 SHS CAPITAL ONE FINANCIAL CORP DEP SHS PFD       | 4,083.          | 3,577.               |           |   |
| 145 SHS CAPITAL ONE FINANCIAL CORP PFD SER F         | 3,966.          | 3,634.               |           |   |
| 100 SHS CHIMERA INVESTMENT CORP PFD SERIES A         | 2,506.          | 2,502.               |           |   |
| 115 SHS CITIGROUP PFD S                              | 3,162.          | 2,910.               |           |   |
| 120 SHS CITIGROUP INC DEP SHS C                      | 3,169.          | 2,977.               |           |   |
| 140 SHS DISCOVER FINANCIAL SERVICES DEP SHS          | 3,744.          | 3,595.               |           |   |
| 100 SHS FIRST REPUBLIC BANK PREF SHARE               | 2,691.          | 2,275.               |           |   |
| 95 SHS FIRST REPUBLIC BANK SAN FRANCISCO CA DEP      | 2,607.          | 2,252.               |           |   |
| 100 SHS GOLDMAN SACHS GROUP INC SER D PFD            | 2,225.          | 2,182.               |           |   |
| 85 SHS GOLDMAN SACHS GROUP                           | 2,351.          | 2,217.               |           |   |
| 185 SHS HUNTINGTON BANCSHARES                        | 5,046.          | 4,681.               |           |   |
| 60 SHS IBERIABANK CORP PREF SHARE                    | 1,632.          | 1,605.               |           |   |
| 65 ING GROEP NV 6.125% PFD                           | 1,698.          | 1,626.               |           |   |
| 270 SHS JP MORGAN CHASE & CO PREF SHARE              | 7,390.          | 6,909.               |           |   |
| 145 SHS LEGG MASON INC PFD 5.45%                     | 3,578.          | 3,133.               |           |   |
| 290 SHS METLIFE INC FLOATING RATE SERIES A PFD       | 7,481.          | 6,751.               |           |   |
| 70 SHS MONMOUTH REAL ESTATE INVT CORP PFD SER C      | 1,752.          | 1,651.               |           |   |
| 220 SHS MORGAN STANLEY DEP FIX/FLT                   | 6,198.          | 5,661.               |           |   |
| 165 SHS NATIONAL GENERAL HOLDINGS CORP PREF<br>SHARE | 4,295.          | 4,123.               |           |   |
| 270 NORTHERN TRUST CORP DEP SHS PFD                  | 7,534.          | 6,766.               |           |   |
| 285 SHS PNC FINANCIAL SERVICES GROUP INC             | 7,414.          | 6,732.               |           |   |
| 110 SHS PUBLIC STORAGE PREF SHARE                    | 2,771.          | 2,332.               |           |   |

|                                          |          |          |
|------------------------------------------|----------|----------|
| 140 REGIONS FINANCIAL CORP NEW PFD       | 3,800.   | 3,522.   |
| 125 SHS REGIONS FINANCIAL CORP NEW PFD   | 3,660.   | 3,316.   |
| 130 SHS SCHWAB CHARLES CORP PREF SHARE C | 3,601.   | 3,284.   |
| 135 SHS SCHWAB CHARLES CORP              | 3,699.   | 3,374.   |
| 135 SHS STATE STREET CORP DEP PFD        | 3,883.   | 3,492.   |
| 135 SHS STATE STREET CORP PREF SHARE     | 3,746.   | 3,378.   |
| 280 SHS SUNTRUST BANKS INC PFD           | 7,442.   | 6,958.   |
| 90 SHS US BANCORP                        | 2,447.   | 2,183.   |
| 175 SHS VALIDUS HOLDINGS LTD PREF SHARE  | 4,475.   | 3,941.   |
| 155 SHS WELLS FARGO & CO PREF SHARE X CL | 4,020.   | 3,551.   |
| 135 SHS WELLS FARGO & CO PREF SHARE      | 3,720.   | 3,384.   |
| TOTAL TO FORM 990-PF, PART II, LINE 10B  | 164,711. | 150,882. |

|             |                   |           |   |
|-------------|-------------------|-----------|---|
| FORM 990-PF | OTHER INVESTMENTS | STATEMENT | 9 |
|-------------|-------------------|-----------|---|

| DESCRIPTION                                           | VALUATION METHOD | BOOK VALUE | FAIR MARKET VALUE |
|-------------------------------------------------------|------------------|------------|-------------------|
| 4498.101 SHS DFA INTERNATIONAL SMALL CAP VALUE        | COST             | 87,738.    | 85,554.           |
| 5955.280 SHS DFA US LARGE CAP VALUE                   | COST             | 195,512.   | 208,971.          |
| 2883.96 SHS DFA US SMALL CAP                          | COST             | 64,912.    | 97,593.           |
| 10842.784 SHS DELAWARE VALUE INSTL                    | COST             | 196,580.   | 213,386.          |
| 18448.30 SHS IVY INTL CORE EQUITY                     | COST             | 302,441.   | 308,640.          |
| 5364.614 SHS JPMORGAN CAP GROWTH SELECT               | COST             | 122,589.   | 170,434.          |
| 2206.109 SHS OPPENHEIMER DEVELOPING MARKETS           | COST             | 74,600.    | 70,529.           |
| 1334.849 SHS T ROWE PRICE MID-CAP GROWTH 1            | COST             | 100,902.   | 100,594.          |
| 3417.664 SHS SALIENT MLP & ENERGY INFRASTRUCTURE      | COST             | 33,271.    | 31,716.           |
| 585.237 SHS VANGUARD REIT INDEX ADM                   | COST             | 70,404.    | 68,397.           |
| 3529.706 SHS VANGUARD GROWTH INDEX ADM                | COST             | 160,870.   | 202,287.          |
| 11656.732 SHS DODGE & COX INCOME FUND                 | COST             | 157,044.   | 158,415.          |
| 17820.487 SHS DOUBLELINE TOTAL RETURN BOND FD         | COST             | 195,218.   | 189,254.          |
| 5234.688 SHS GOLDMAN SACHS HIGH YIELD INST            | COST             | 0.         | 0.                |
| 4508.666 SHS PALMER SQUARE INCOME PLUS                | COST             | 44,629.    | 43,824.           |
| 3436.328 SHS PRINCIPAL PREFERRED SECURITIES INST      | COST             | 0.         | 0.                |
| 14975.571 SHS VANGUARD INTERM TERM BOND INDEX ADM FD  | COST             | 174,226.   | 168,325.          |
| 2021.824 SHS GREAT LAKES TORTOISE MLP & PIPELINE INST | COST             | 18,905.    | 28,346.           |
| 1675.598 SHS GUGGENHEIM MACRO OPPORTUNITIES           | COST             | 43,000.    | 44,186.           |

|                                        |      |            |            |
|----------------------------------------|------|------------|------------|
| 10393.314 SHS LAZARD US CORP INCOME    | COST |            |            |
| PORTFOLIO INSTITUTIONAL SHARE FUND     |      | 50,927.    | 50,615.    |
| TOTAL TO FORM 990-PF, PART II, LINE 13 |      | 2,093,768. | 2,241,066. |

FORM 990-PF

OTHER ASSETS

STATEMENT 10

| DESCRIPTION                      | BEGINNING OF<br>YR BOOK VALUE | END OF YEAR<br>BOOK VALUE | FAIR MARKET<br>VALUE |
|----------------------------------|-------------------------------|---------------------------|----------------------|
| ACCRUED DIVIDEND RECEIVABLE      | 528.                          | 1,857.                    | 1,857.               |
| TO FORM 990-PF, PART II, LINE 15 | 528.                          | 1,857.                    | 1,857.               |

FORM 990-PF

LIST OF SUBSTANTIAL CONTRIBUTORS  
PART VII-A, LINE 10

STATEMENT 11

| NAME OF CONTRIBUTOR                     | ADDRESS                                                          |
|-----------------------------------------|------------------------------------------------------------------|
| POLSKY CHARITABLE REMAINDER<br>UNITRUST | 4801 WEST 110TH STREET, SUITE 150<br><br>OVERLAND PARK, KS 66211 |

FORM 990-PF PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS STATEMENT 12

| NAME AND ADDRESS                                                       | TITLE AND<br>AVRG HRS/WK | COMPEN-<br>SATION | EMPLOYEE<br>BEN PLAN EXPENSE<br>CONTRIB ACCOUNT |
|------------------------------------------------------------------------|--------------------------|-------------------|-------------------------------------------------|
| JENNIFER SALAZAR<br>12120 ALHAMBRA<br>LEAWOOD, KS 66209                | CO-TRUSTEE<br>0.10       | STMT<br>15 0.     | 0. 0.                                           |
| LAURENCE POLSKY<br>12120 ALHAMBRA<br>LEAWOOD, KS 66209                 | CO-TRUSTEE<br>0.10       | STMT<br>15 0.     | 0. 0.                                           |
| ELLEN GINSBURG POLSKY<br>12120 ALHAMBRA<br>LEAWOOD, KS 66209           | CO-TRUSTEE<br>0.10       | STMT<br>15 0.     | 0. 0.                                           |
| KAREN POLSKY KENT<br>62 CORRAL DRIVE<br>CARBONDALE, CO 81623           | CO-TRUSTEE<br>0.10       | STMT<br>15 0.     | 0. 0.                                           |
| STEVEN POLSKY<br>2616 ELLERHORST AVENUE<br>EL CERRITO, CA 94530        | CO-TRUSTEE<br>0.10       | 0.                | 0. 0.                                           |
| AUTUMN KENT DESIMONE<br>57 CORRAL DRIVE<br>CARBONDALE, CO 81623        | CO-TRUSTEE<br>0.10       | 0.                | 0. 0.                                           |
| RENEE POLSKY SILVER<br>12222 BEVERLY STREET<br>OVERLAND PARK, KS 66209 | CO-TRUSTEE<br>0.10       | STMT 15<br>0.     | 0. 0.                                           |
| JOSEPH POLSKY<br>12120 ALHAMBRA<br>LEAWOOD, KS 66209                   | CO-TRUSTEE<br>0.10       | 0.                | 0. 0.                                           |
| LARRY SILVER<br>12222 BEVERLY STREET<br>OVERLAND PARK, KS 66209        | CO-TRUSTEE<br>0.10       | STMT 15<br>0.     | 0. 0.                                           |
| ADRIAN SALAZAR<br>12120 ALHAMBRA<br>LEAWOOD, KS 66209                  | CO-TRUSTEE<br>0.10       | STMT 15<br>0.     | 0. 0.                                           |
| MARK OLIVER<br>2616 ELLERHORST AVENUE<br>EL CERRITO, CA 94530          | CO-TRUSTEE<br>0.10       | 0.                | 0. 0.                                           |
| TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII                           |                          | 0.                | 0. 0.                                           |

FORM 990-PF

ELECTION UNDER REGULATIONS SECTION  
53.4942(A)-3(D)(2) TO APPLY  
EXCESS QUALIFYING DISTRIBUTIONS  
TO PRIOR YEAR'S UNDISTRIBUTED INCOME

STATEMENT 13

THE NORMAN & ELAINE POLSKY FAMILY CHARITABLE FOUNDATION, ID#  
48-1232337, HEREBY ELECTS UNDER REGS SEC 53.4942(A)-3(D)(2) TO  
DESIGNATE THE QUALIFYING DISTRIBUTIONS OF 129,000 MADE DURING THE YEAR  
ENDED DECEMBER 31, 2015. THE TAXPAYER ELECTS THAT THE DISTRIBUTIONS  
BE ALLOCATED IN THE FOLLOWING MANNER: (1) 121,724 TO THE TAXABLE YEAR  
ENDED DECEMBER 31, 2015; (2) 1,304 TO THE TAXABLE YEAR ENDED DECEMBER  
31, 2014 AND (3) 5,972 TO THE TAXABLE YEAR ENDED DECEMBER 31, 2016.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION  
PART XV, LINES 2A THROUGH 2D

STATEMENT 14

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

ROBERT J. O'HALLORAN  
4801 WEST 110TH STREET, SUITE 150  
OVERLAND PARK, KS 66211

TELEPHONE NUMBER

913-341-8500

FORM AND CONTENT OF APPLICATIONS

BRIEF LETTER FORMAT STATING GENERAL NATURE, GOALS AND PURPOSE OF REQUESTING ORGANIZATION.

ANY SUBMISSION DEADLINES

SUBMISSION SHOULD BE MADE BY DECEMBER 31ST FOR REQUEST FOR FUNDS FOR THE NEXT CALENDAR YEAR.

RESTRICTIONS AND LIMITATIONS ON AWARDS

NO RESTRICTIONS EXCEPT THAT THE ORGANIZATION IS TAX-EXEMPT UNDER IRS 501(C)(3).