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Form **990-P**F

2017 EXTENDED TO NOVEMBER 15, Return of Private Foundation

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

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

OMB No 1545-0052

Department of the Treasury

▶ Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf. Internal Revenue Service For calendar year 2016 or tax year beginning and ending Name of foundation A Employer identification number ANZ FAMILY FOUNDATION 63-1018303 Number and street (or P O box number if mail is not delivered to street address) Room/suite B Telephone number 3 BUCKHEAD LANE 334-749-1486 City or town, state or province, country, and ZIP or foreign postal code C If exemption application is pending, check here 36801 OPELIKA, AL G Check all that apply: Initial return Initial return of a former public charity D 1. Foreign organizations, check here Final return Amended return 2. Foreign organizations meeting the 85% test, check here and attach computation Address change Name change H Check type of organization: Section 501(c)(3) exempt private foundation E If private foundation status was terminated Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation under section 507(b)(1)(A), check here 1 Fair market value of all assets at end of year | J Accounting method: X Cash F If the foundation is in a 60-month termination. Other (specify) (from Part II, col. (c), line 16) under section 507(b)(1)(B), check here 102,913. (Part I, column (d) must be on cash basis) ▶\$ Part I Analysis of Revenue and Expenses (d) Disbursements for charitable purposes (cash basis only) (c) Adjusted net (a) Revenue and (b) Net investment (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a)) expenses per books income income Contributions, gifts, grants, etc., received 2 Check X If the foundation is not required to attach Sch B Interest on savings and temporary cash investments 222 222 STATEMENT Dividends and interest from securities 5a Gross rents b Net rental income or (loss) RECEIVED 6a Net gain or (loss) from sale of assets not on line 10 b Gross sales price for all assets on line 6a 0. 7 Capital gain net income (from Part IV, line 2) SEP 1 2 2017 8 Net short-term capital gain Income modifications OGDEN 10a Gross sales less returns and allowances b Less Cost of goods sold c Gross profit or (loss) 11 Other income 222 222 0. Total. Add lines 1 through 11 12 0. 0. 0. 0 Compensation of officers, directors, trustees, etc 14 Other employee salaries and wages 15 Pension plans, employee benefits 16a Legal fees **b** Accounting fees c Other professional fees 17 Interest 18 Taxes 19 Depreciation and depletion 20 Occupancy 21 Travel, conferences, and meetings 22 Printing and publications 23 Other expenses 24 Total operating and administrative 0 expenses. Add lines 13 through 23 0 0 38,200 38,200. Contributions, gifts, grants paid Total expenses and disbursements. 38,200 0 0 38,200. Add lines 24 and 25 27 Subtract line 26 from line 12: -37,978 2 Excess of revenue over expenses and disbursements

0

b Net investment income (if negative, enter -0-)

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

222

Fo	rm 99	90-PF (2016) ANZ FAMILY FOUNDATION			1018303 Page 2
F	art	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	End o	
_			(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing	4.0		
		Savings and temporary cash investments	140,791.	102,813.	102,813.
	3	Accounts receivable ►			
		Less: allowance for doubtful accounts			
	4	Pledges receivable >			
	_	Less: allowance for doubtful accounts			
	1]	Grants receivable	<u></u>		
	6	Receivables due from officers, directors, trustees, and other	100	100	100
		disqualified persons	100.	100.	100.
	7	Other notes and loans receivable			
		Less: allowance for doubtful accounts			
ets	8	Inventories for sale or use			
Assets	9	Prepaid expenses and deferred charges			
1	1	Investments - U.S. and state government obligations			
		Investments - corporate stock			
	1 -	Investments - corporate bonds			
	11	Investments - land, buildings, and equipment basis			
	}	Less accumulated depreciation			
	12	Investments - mortgage loans			
	13	Investments - other			
	14	Land, buildings, and equipment: basis ▶	Ì		
	ł	Less accumulated depreciation			
	i .	Other assets (describe ►)			
	16	Total assets (to be completed by all filers - see the	440.004	400 040	100.010
	<u> </u>	instructions. Also, see page 1, item I)	140,891.	102,913.	102,913.
	17	Accounts payable and accrued expenses			
	18	Grants payable			
es	19	Deferred revenue			
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons			
iat	21	Mortgages and other notes payable			
-	22	Other liabilities (describe)			
	ļ	j.			
	23	Total liabilities (add lines 17 through 22)	0.	0.	
		Foundations that follow SFAS 117, check here	Ì		
S		and complete lines 24 through 26 and lines 30 and 31.			
ည	24	Unrestricted			
aga	25	Temporarily restricted			
Net Assets or Fund Balances	26	Permanently restricted			
Ē		Foundations that do not follow SFAS 117, check here		1	
卢		and complete lines 27 through 31.			
ţ	27	Capital stock, trust principal, or current funds	0.	0.	
SSe	28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
Ϋ́	29	Retained earnings, accumulated income, endowment, or other funds	140,891.	102,913.	
ž	30	Total net assets or fund balances	140,891.	102,913.	
	١		140 001	102 012	
_	31	Total liabilities and net assets/fund balances	140,891.	102,913.	
P	art	Analysis of Changes in Net Assets or Fund Ba	alances		
<u> </u>	Total	net assets or fund balances at beginning of year - Part II, column (a), line	30		
		t agree with end-of-year figure reported on prior year's return)		11	140,891.
	•	amount from Part I, line 27a		2	-37,978.
		r increases not included in line 2 (itemize)		3	0.
		ines 1, 2, and 3		4	102,913.
		eases not included in line 2 (itemize)		5	0.
		net assets or fund balances at end of year (line 4 minus line 5) - Part II, co	lumn (b), line 30	6	102,913.
		· · · · · · · · · · · · · · · · · · ·			Form 990-PF (2016)

38,200.

8 Enter qualifying distributions from Part XII, line 4

See the Part VI instructions.

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.

Forn	n 990-PF (2016) ANZ FAMILY FOUNDATION		<u>-1018</u>			Page 4
Pε	art VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or	4948	- see i	nstru	ctio	ns)
1a	Exempt operating foundations described in section 4940(d)(2), check here 🕨 🔲 and enter "N/A" on line 1.	}				
	Date of ruling or determination letter: (attach copy of letter if necessary-see instructions)	1	1			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here 🕨 🛣 and enter 1%	1	L			2.
	of Part I, line 27b					
C	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).					
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	<u></u>			0.
3	Add lines 1 and 2	3				2.
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.
6	Credits/Payments:					
а	2016 estimated tax payments and 2015 overpayment credited to 2016 6a	_				
b	Exempt foreign organizations - tax withheld at source 6b	}				
	Tax paid with application for extension of time to file (Form 8868) 6c	7	i			
	Backup withholding erroneously withheld 6d 6d	7	ľ			
	Total credits and payments. Add lines 6a through 6d	7				0.
	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached	8				
	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9				2.
	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10				
	Enter the amount of line 10 to be: Credited to 2017 estimated tax	11				
	nt VII-A Statements Regarding Activities					
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or interven	e in			Yes	No
	any political campaign?			1a		X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition	1)?		1b		X
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials publis					
	distributed by the foundation in connection with the activities.					
c	Did the foundation file Form 1120-POL for this year?			1c		x
	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:					
Ī	(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	-		 		1
٠	managers. > \$ 0.					1
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?			2		х
_	If "Yes," attach a detailed description of the activities.					
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation,	or		ł	ı	1
•	bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes			3		X
42	Did the foundation have unrelated business gross income of \$1,000 or more during the year?			4a		X
	If "Yes," has it filed a tax return on Form 990-T for this year?	N	/A	4b		
	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	•	•	5		Х
•	If "Yes," attach the statement required by General Instruction T.					
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:					ĺ
•	By language in the governing instrument, or					
	 By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state 	e law		} }		ĺ
	remain in the governing instrument?			6	Х	1
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 X	/		7	X	
•	big the foundation have at least popular in according the search state of the highest transfer and the highest		1			$\overline{}$
8a	Enter the states to which the foundation reports or with which it is registered (see instructions)		1			
-	AL,				[l
h	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate)					
J	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 call	endar			_=	
•	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
			For	m 99 0	-PF	

Yes No	P	art VII-A Statements Regarding Activities (continued)			
section 512(b) (137) **I*** a milent specified (see metricularies) If Yes, "attack statement (see instructions) If Yes, "attack statement (see instructions) If Yes, "attack statement (see instructions) If Yes books are in care of ▶ DR. BERTRAND ANZ, II Telephone no. ▶ (334) 749 − 7261 Located at № 3.3 BUCKHEAD LANE, OPELIKA, AL If the books are in care of ▶ DR. BERTRAND ANZ, III Telephone no. ▶ (334) 749 − 7261 Located at № 3.3 BUCKHEAD LANE, OPELIKA, AL If Yes books are in care of ▶ DR. BERTRAND ANZ, III Telephone no. ▶ (334) 749 − 7261 Located at № 3.3 BUCKHEAD LANE, OPELIKA, AL If Yes and enter the manuron of tax-exempt interest received or accrued during the year If A ray since during calcidar year 28 ft, did the foundation have an interest in or a signature or other authority over a bank, securities, or other hancoid account in a foreign country? Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required FIFE Form 4720 if any item is checked in the "Yes" column, unless an exception applies. If a fundamental interest is the foundation have an interest in or a signature or other authority over a bank, securities, or other hancoid account in a foreign country? Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required FIFE Form 4720 if any item is checked in the "Yes" column, unless an exception applies. If a fundamental is the foundation in adequalited person? If yes ∑ No If yes Z No If				Yes	No
12 Did the foundation make a dischalution to a dinor advised fund over which the foundation or a disqualified person had advisory grivleges? 17 % 3 miles better for the surrounding of the foundation comply with the public inspection requirements for its annual returns and exemption application? 12 X 13 X 13 X 14 15 15 15 15 15 15 15	11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of	ł		ł
12 Did the foundation make a dishribution to adnore advised fund over which the foundation or a disqualified person had edvisory privileges? 12 X		section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		Х
13 Mark the foundation comply with the public inspection requirements for its annual returns and exemption application? 13 X	12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges?			
Webster address N/A		If "Yes," attach statement (see instructions)	12		_X_
14 The books are nate of ▶ DR. BERTRAND ANZ, IT Telephone no. ▶ (334)749-7261 Located at № 3 BUCKHRAD LANE, OPELTKA, AI. 15 Section 4847(3)(1) nonexampt charitable trusts filing Form 99D-PF in lieu of Form 1041-Check here and enter the amount of lax-exempt interest received or accurate during the year A tray from dearing calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the neintruchens for exceptions and filing requirements for FindEN Form 114, II "yes," enter the name of the foreign country. Perry 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. 1 Degree of the foundation (either directly or indirectly): (1) Engage in this sale or exchange, or issaing of property with a dayualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reminibuse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any or other wasted for the benefit or use of a disqualified person? (6) Agree to pay money or property to a government official? (Exception, Chick "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government strokers, at termination with my of other wasted to second a disqualified person? (8) Agree to pay money or propretly to a government official? (Exception, Chick "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government strokers, at termination with the grant of government strokers, atterminating within 90 days; (8) Agree to pay money or propropry or propry propry propry propry propry propry propry propry	13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
Located at N 3 BUCKHRAD LANE, OPPLIKA, AL Section 4947(a)(1) nonexempt charable trusts fitting Form 990-PF in level of Form 1041 - Check here and either the amount of lax-exempt interest received or accrued during the year 16 Atary time during calendar year 2016, did the foundation have an interest nor a signature or other authors yover a bank, securities, or other financial account in a foreign counting? See the instructions for exceptions and flang requirements for FinCEN Form 114. If Yes,* entar the name of the foreign counting. Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any item its checked in the "Yes" column, unless an exception applies. 1a During the year did the foundation (either directly or indirectly); (1) Engage in the sake or exchapic, or leasing of property with a disqualified person? (2) Borrow money from, lean formough for, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or remibures the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person? or make any of either available to the benefit or use of a disqualified person? (6) Agree to pay money or property to a government official? (Exception. Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) b if any answer is Yes's to 1s(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.444(6)-30 in an autrent notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? 1a At the end of tax year 2016, did the foundation have any undistributed mome (here 6d and 6e,		Website address ► N/A			
15 Section 4947(a)(1) nonexempt charizable trusts filing Form 990;PF in less of Form 1041 - Check here and enter the amount of lax-exempt interest received or accrued during the year 16 At any time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If Yes, either the name of the foreign country. Pert 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. 18 Uning the year did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, servese, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assists to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? (6) Agree to pay money or property to a government official? (Exception, Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) 10 It any assews in "Yes" to 14(1)-(6), did any of the stack late foundation. Check "No" if the foundation engage in pair year in any of the acid secreted in 1s, other than excepted acis, that were not corrected before the first day of the tax year beginning in 2016? 2 Teases on faulties to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(a)(2) are being applied to any of the years listed an exe, list the years here. 2 Tease of a finitize to dist	14				1
and other the amount of fax-exempt interest received or accused during the year 6 At any time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and fining requirements for FinCRH Form 114. If Yes, and the time and of the foreign country. Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1 a During the year did the foundation (either directly or indirectly); (1) Engage in the sale or exchange, or leasing of property with a disqualited person? (2) Borrow money from, lend money for, or otherwise extend credit to (or accept if from) a disqualited person? (3) Furnish goods, services, or facilities to expenses of, a disqualited person? (4) Pay compensation to, or pay or remburse the expenses of, a disqualited person? (5) Transfer any uncome or assets to a disqualited person of or make any of either available for the benefit or use of a disqualited person (or make any of either available for the benefit or use of a disqualited person (or make any of either available for the benefit or use of a disqualited person (or make any of either available for the benefit or use of a disqualited person (or make any of either available for the benefit or use of a disqualited person (or make any of either available for the foreit or use of a disqualited person (or make any of either available for the principle of			<u>6801</u>		,
No securities, or other financial account in a loreign country	15			, . >	· []
Securities, or other financial account in a foreign country? See the instructions for exceptions and filting requirements for FinCEN Form 114. If 'Yes,' enter the name of the foreign country! > Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies. 1 During the year did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of properly with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburs the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? (6) Agrice to pay money or property to a government official? (Exception. Check 'No' if the foundation agreed to make a great to or to employ the official for a period after termination of government service, if terminating within 90 disps.) 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 53.494 (10)-3 or in a current notice regarding dissets assistance (see instructions)? 7 Organizations relying on a current notice regarding dissets assistance (see instructions)? 8 Organizations relying on a current notice regarding dissets assistance (see instructions)? 9 Taxes on failure to distribute mocine (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(3)(3) or 4942(3)(5)): a Aft the and of ax year 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016? If 'Yes,' list the years beginning a 2016 as a result of (1) any purchase by the foundation or disqualified perso			N		NIA
See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country. Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1a During the year did the foundation (either directly or indirectly); (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, land money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? (6) Agree to pay money or property to a government official? (Exception, Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) b If any answer is "Yes" to 12(1)(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(7).3 or in a current notice regarding disaster assistance check here c Did the foundation engage in a prior year in any of the acts fail to qualify under the exceptions described in Regulations section 54.9421(3) or 4942(3)(3) or 4942(3)(5): a At the end of tax year 2016, did the foundation have any undistributed uncome (lines 6d and 6e, Part XIII) for tax year(s) beginning before 20 16? If "Yes," list the years I are instructions.) of If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years listed, answer "No" and attach statement - see instructions.) In the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? In the specific of the seed of the 5	16			res	l
Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required			16	L	
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1 During the year dut the foundation (either diexed for or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person)? (6) Agree to pay money or property to a government official? (Exception, Check 'No' if the foundation available of the foundation of the exception and the termination of government service, if terminating within 90 days.) b) It any answer is 'Yes' to 121/(-16), did any of the acts fail to quality under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaste			- [
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1a During the year did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furmish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a givant to or to employ the official for a period after termination of government service, if terminating within 90 days.) b) If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(4)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here 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? 1a At the end of fax year 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016? 1 Tyes, Tist the years b b) Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) a lil year sisted, answer "No" and attach statement - see instructions). 1b If "Yes," Ext. No 1c If the provisions of section 4942(a)(2)	Pa				
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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) N/A Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 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? X	00		1	ļ	
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) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4b 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? X	ь	- ·	1 1	Ì	
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) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4a X b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2016? 4b X	•			ļ	
Form 4720, to determine if the foundation had excess business holdings in 2016) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 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? N/A 4a X X					
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2016? 4b X			3b		
had not been removed from jeopardy before the first day of the tax year beginning in 2016?			4a		_X_
	b			Ì	

Part VII-B Statements Regarding Activities for Which	Form 4720 May Re I	Required (contro	<u>63-10183</u>	.03	Page 6
5a During the year did the foundation pay or incur any amount to:	i omi 4/20 May be	rtequired (contin	, dea)		
(1) 'Carry on propaganda, or otherwise attempt to influence legislation (section	n 4945(e)\?	v	es X No		
(2) Influence the outcome of any specific public election (see section 4955); (• • •		30 223	- 1	1
any voter registration drive?	or to carry on, an oddy or man		es X No		
(3) Provide a grant to an individual for travel, study, or other similar purposes	3?		es X No	1	
(4) Provide a grant to an organization other than a charitable, etc., organization					
4945(d)(4)(A)? (see instructions)	40001.000 III 0001.011		es X No	ľ	ĺ
(5) Provide for any purpose other than religious, charitable, scientific, literary,	or educational purposes, or				- [
the prevention of cruelty to children or animals?	, •. · · · · · , · · · · · · · · · · · · ·		es X No		
b if any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify uni	der the exceptions described				1
section 53.4945 or in a current notice regarding disaster assistance (see instru		_		5b	x
Organizations relying on a current notice regarding disaster assistance check h	nere		▶□ [
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption f	rom the tax because it mainta	ined		ļ	
expenditure responsibility for the grant?	N	J/A □ Ye	es 🔲 No	-	
If "Yes," attach the statement required by Regulations section 53.494.	5-5(d).		1		1
6a Did the foundation, during the year, receive any funds, directly or indirectly, to	pay premiums on		1	ł	
a personal benefit contract?		Y6	es X No	1	
b Did the foundation, during the year, pay premiums, directly or indirectly, on a p	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 s	shelter transaction?	Ye	es 🗓 No		
b If "Yes," did the foundation receive any proceeds or have any net income attribu				7b	<u></u>
Part VIII Information About Officers, Directors, Trust	ees, Foundation Ma	inagers, Highly	У		
Paid Employees, and Contractors					
1 List all officers, directors, trustees, foundation managers and their		(c) Compensation	(d) Contributions to	(-) F	
(a) Name and address	(b) Title, and average hours per week devoted to position	(If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	accou allov	xpense nt, other vances
DR. BERTRAND ANZ, II	PRES/TREAS				
3 BUCKHEAD LANE					
OPELIKA, AL 36801	0.10	0.	0.	L	0.
DR. LINDA ANZ	VP/SEC				
3 BUCKHEAD LANE		1			
OPELIKA, AL 36801	0.10	0.	0.		0.
		!			
		1			
					
		}			
2 Compensation of five highest-paid employees (other than those inc	Judad on line 1) If name	enter "MONE "	<u> </u>	L	
2 Compensation of five highest-paid employees (other than those inc	(b) Title, and average	enter NONE.	(d) Contributions to	(e) F	xpense
(a) Name and address of each employee paid more than \$50,000	hours per week devoted to position	(c) Compensation	employee benefit plans and deferred	accoui	xpense nt, other vances
NONE	devoted to position		compensation	allow	Valles
NOINE					
			-		
				Ì	
		1			
] .			
·					
		1	l		
Fotal number of other employees paid over \$50,000					0
			Form	990-PI	F (2016)

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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		
	-	
	1	
		
	1	
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 SUPPORTING PROGRAMS OF THE OWEN CENTER		·
IDOFFORTING FROGRAMS OF THE OWEN CENTER	-	
	<u> </u>	3,200.
2 SUPPORTING PROGRAMS OF SOUTHERN LEADERSHIP EXPERIENCE		
	-	20 000
3 SUPPORTING THE WORK OF COVENTANT PRESBYTERIAN CHURCH		20,000.
S DOLLOWILL WORK OF COVERTENT INDUITEMENT CHOKON	7	
		15,000.
4	_	
	\dashv	
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 NONE	4	
	_	0.
2	+	<u>0.</u>
,	<u> </u>	· · · · · · · · · · · · · · · · · · ·
All other program-related investments. See instructions.	-	
3	-	
	┪	
	<u> </u>	
	_	
Total Add lines 1 through 3		
Total. Add lines 1 through 3		0 · n 990-PF (2016)
		\= - 1 - /

P	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign fou	ndations,	see instructions)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a		1a	0.
b		1b	
c	Fair market value of all other assets	1c	
d		1d	0.
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	0.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	0.
6	Minimum investment return. Enter 5% of line 5	6	0.
P	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations ar	d certain	
L	foreign organizations check here and do not complete this part.)		
1	Minimum investment return from Part X, line 6	1	0.
2a	Tax on investment income for 2016 from Part VI, line 5		
b	Income tax for 2016. (This does not include the tax from Part VI.)		
C	Add lines 2a and 2b	2c	2.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	0.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	0.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	0.
P	art XII Qualifying Distributions (see instructions)		
<u>-</u>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
` a	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1a	38,200.
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:		
а	Suitability test (prior IRS approval required)	3a	
ь	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	38,200.
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	2.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	38,198.
•	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation of		
	40.40(a) and unition of they in those years		

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2015	(c) 2015	(d) 2016
1 Distributable amount for 2016 from Part XI,				
line 7				0.
2 Undistributed income, if any, as of the end of 2016				<u></u>
a Enter amount for 2015 only			0.	
b Total for prior years:				
· · · · ·		0.		
3 Excess distributions carryover, if any, to 2016:			****	
a From 2011				
b From 2012				
c From 2013				
d From 2014				
e From 2015				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2016 from				
Part XII, line 4: ►\$ 38,200.				
a Applied to 2015, but not more than line 2a	,		0.	
b Applied to undistributed income of prior				
years (Election required - see instructions)		0.		
c Treated as distributions out of corpus				
(Election required - see instructions)	0.			
d Applied to 2016 distributable amount				0.
e Remaining amount distributed out of corpus	38,200.			
5 Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:			1	
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	38,200.			
b Prior years' undistributed income. Subtract				
line 4b from line 2b		0.		
c Enter the amount of prior years'				
undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable				
amount - see instructions		0.		
e Undistributed income for 2015. Subtract line				
4a from line 2a. Taxable amount - see instr.		,	0.	
f Undistributed income for 2016. Subtract				
lines 4d and 5 from line 1. This amount must				
be distributed in 2017		İ		0.
7 Amounts treated as distributions out of				
corpus to satisfy requirements imposed by				
section 170(b)(1)(F) or 4942(g)(3) (Election				
may be required - see instructions)	0.			
8 Excess distributions carryover from 2011				
not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2017.				
Subtract lines 7 and 8 from line 6a	38,200.			
0 Analysis of line 9:				
a Excess from 2012				
b Excess from 2013				
c Excess from 2014				
d Excess from 2015				
e Excess from 2016 38,200.				
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Part XV Supplementa	ry Information	(continued)			
3 Grants and Contributions	Paid During the Y	ear or Approved for Future	Payment		
Recipient		If recipient is an individual, show any relationship to	Foundation	Purpose of grant or contribution	Amount
Name and address (home of	or business)	show any relationship to any foundation manager or substantial contributor	status of recipient	Contribution	, unount
a Paid during the year					
COVENANT PRESBYTERIAN CHU	JRCH, PCA	N/A		SUPPORT CHURCH	
445 SHELTON MILL ROAD AUBURN, AL 36830				PROGRAMS	15,000.
noboldi, na sooso					33,000.
SOUTHERN LEADERSHIP EXCH	ANGE	N/A	1	SUPPORT PROGRAMS	
PO BOX 3557	4100				
LANTANA, FL 53465					20,000.
THE OWEN CENTER		N/A		SUPPORT PROGRAMS	
670 NORTH COLLEGE STREET, AUBURN, AL 36830	, STE A				3,200.
Noboldi, No 30030					
		}			
		•			
Total			· · · · · · · · · · · · · · · · · · ·	▶ 3a	38,200.
b Approved for future payme	nt		}		
			,		
NONE					
				,	
Total			·	▶ 3b	0.
				Fo	orm 990-PF (2016)

Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.		ousiness income		ided by section 512, 513, or 514	(e)
	(a) Business	(b)	(C) Exclu- sion	(d)	Related or exempt
1 Program service revenue:	code	Amount	code	Amount	function income
a	-				
b	-		ļ		
C	-		ļ		
d					
е					
f	-		<u> </u>		
g Fees and contracts from government agencies			<u> </u>		
2 Membership dues and assessments					
3 Interest on savings and temporary cash					
investments			ļ <u>.</u>		222.
4 Dividends and interest from securities					
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property			 		
6 Net rental income or (loss) from personal	-				
property					
7 Other investment income					·
8 Gain or (loss) from sales of assets other					
than inventory					
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a	1 1				
b					
<u> </u>	1 1				
d	·				
e	·				222
12 Subtotal. Add columns (b), (d), and (e)	<u> </u>	0.		0.1	
13 Total. Add line 12, columns (b), (d), and (e)				13	
(See worksheet in line 13 instructions to verify calculations.)					
Part XVI-B Relationship of Activities	to the Accom	plishment of Ex	empt	t Purposes	
Line No. Explain below how each activity for which inco	ome is reported in co	olumn (e) of Part XVI-A	contrib	uted importantly to the accom	plishment of
the foundation's exempt purposes (other than					
3 INTEREST EARNED ON INV					
AVAILABLE FOR DISTRIBU			ADI	DITIONAL SUPPO	ORT FOR
THE FOUNDATION'S CHARI	TABLE CAU	SE.			
				 _	
					
					·····
					
					

Part AVII	Information Re Exempt Organ		nsters to	and Iransactions	and Relations	inips With Nonc	naritable	€	
1 Did the c	rganization directly or indi		of the following	an with any other organizat	ion described in sec	tion 501(c) of		Yes	No
	(other than section 501(c					1011 00 1(0) 01			
	s from the reporting found				inizations:			1 1	ſ
(1) Casi		ation to a monomana	abio oxompt or	gameation of.			1a(1)		Х
(2) Othe							1a(2)		X
b Other tra							1.0(2)		
	s of assets to a noncharital	hle exempt organiza	ation				1b(1)		X
, -	chases of assets from a no						1b(2)		X
	al of facilities, equipment,	· ·	g				1b(3)		X
• •	nbursement arrangements						1b(4)		Х
• •	ns or loan guarantees						1b(5)		X
(6) Perf	ormance of services or me	mbership or fundra	ising solicitatio	ons			1b(6)		X
c Sharing	of facilities, equipment, ma	iling lists, other ass	ets, or paid em	ployees			1c		X
d if the ans	wer to any of the above is	"Yes," complete the	following sche	edule. Column (b) should a	lways show the fair r	narket value of the goo	ds, other ass	ets,	
or servic	es given by the reporting fo	oundation. If the for	ındatıon receiv	ed less than fair market val	lue in any transaction	n or sharing arrangeme	nt, show in		
column (d) the value of the goods,								
(a) Line no	(b) Amount involved	(c) Name o		e exempt organization	(d) Description	of transfers, transactions,	and sharing ari	angeme	nts
		Ĺ	N/A_						
									
									
									
									
									
									
		L							
	indation directly or indirect	•			iizations described			77	1
	1 501(c) of the Code (other	-	(3)) or in sect	tion 52/?			Yes	X	1 1/10
b it yes, c	omplete the following sche (a) Name of org			(b) Type of organization		(c) Description of relation	nehin		
	N/A	amzanon		(b) Type of organization		(v) Description of relation	onomp		
	1V/ A				 				
									
طامحما	r penalties of perjury, I declare telefi, it is mus, correct, and com						May the IRS d	liscuss th	าเร
Sign	eller, it is inde, correct, and com	ipiete Declaration of the	parer (other than	(taxpayer) is based on an inion			return with the shown below		
Here	1 XXX aus	CHGY	und	9-1-17	PRESII	DENT	X Yes	L	No
Sig	nature of officer or trustee		Tr	Date	Title	Chook DT	INI		
	Print/Type preparer's na	me	Preparer's si	ignature •	Date	Check I If PT self- employed	III		
Paid	ANTATE M MASS		(, '	V) V)	08/17/17		00014	025	
Preparer	ANNE M MAY Firm's name ► MAC		CONFV	LLP	400/11/11	Firm's EIN ► 63-			
Use Only	I IIII S HAILE FIAC.	HEN MCCILE	17111111)	THIN SEIN P US	30340	<i>-</i>	
٠, *	Firm's address ▶ 18	20 E. UNI	VERSIT	Y DRIVE	· · · · · · · · · · · · · · · · · · ·	 			
			36830			Phone no. 334-	<u>887</u> -7	022	
							Form 990		2016)

FORM 990-PF	INTEREST	ON	SAVINGS	AND TEMPORA	RY CASH	INVESTMENTS	STATEMENT	1
SOURCE				(A) REVENUE PER BOOKS	NET	(B) INVESTMENT INCOME	(C) ADJUSTED NET INCOME	G.
INTEREST INC	OME		-	22	2.	222.	22	22.
TOTAL TO PART I, LINE 3		3	=	222.		222.	222	
FORM 990-PF		I		r XV - LINE FOUNDATION M			STATEMENT	2

NAME OF MANAGER

DR. BERTRAND ANZ, II

DR. LINDA ANZ