



See a Social Security Number? Say Something!
Report Privacy Problems to <https://public.resource.org/privacy>
Or call the IRS Identity Theft Hotline at 1-800-908-4490



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

Name of foundation THE BEN E FACTOR FOUNDATION		A Employer identification number 72-1086995	
Number and street (or P O box number if mail is not delivered to street address) 106 WILREE STREET		Room/suite	B Telephone number (see instructions) (337) 376-6254
City or town, state or province, country, and ZIP or foreign postal code NEW IBERIA, LA 70563		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 969,554	J Accounting method ☐ Cash ☒ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	190,312			
	2 Check ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	414,427	414,427		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10 	17,926			
	b Gross sales price for all assets on line 6a 307,261				
	7 Capital gain net income (from Part IV, line 2)		17,728		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances _____				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	622,665	432,155		
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule) 	2,013	2,013		
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions) 	4,298			
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule) 	200	200		
	24 Total operating and administrative expenses. Add lines 13 through 23	6,511	2,213		0
	25 Contributions, gifts, grants paid	819,300			819,300
	26 Total expenses and disbursements. Add lines 24 and 25	825,811	2,213		819,300
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-203,146			
	b Net investment income (if negative, enter -0-)		429,942		
c Adjusted net income(if negative, enter -0-)					

Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing			
	2 Savings and temporary cash investments	1,294,739	969,554	969,554
	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 (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments—U S and state government obligations (attach schedule)	1,229,963	1,272,635	
	b Investments—corporate stock (attach schedule)	11,341,942	12,365,163	
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)			
	14 Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15 Other assets (describe ▶ _____)				
16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	13,866,644	14,607,352	969,554	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶ _____)			
	23 Total liabilities (add lines 17 through 22)		0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ☒ and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted	13,866,644	14,607,352	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ☐ and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg , and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 Total net assets or fund balances (see instructions)	13,866,644	14,607,352	
31 Total liabilities and net assets/fund balances (see instructions) .	13,866,644	14,607,352		

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	13,866,644
2 Enter amount from Part I, line 27a	2	-203,146
3 Other increases not included in line 2 (itemize) ▶ _____	3	943,854
4 Add lines 1, 2, and 3	4	14,607,352
5 Decreases not included in line 2 (itemize) ▶ _____	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	14,607,352

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			
b			
c			
d			
e			

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	17,728
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) (see instructions) If (loss), enter -0- in Part I, line 8	If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2015	675,884	13,989,684	0 048313
2014	690,032	13,786,312	0 050052
2013	614,002	13,060,099	0 047014
2012	644,415	12,500,812	0 051550
2011	599,488	12,141,279	0 049376
2 Total of line 1, column (d)			2 0 246305
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years			3 0 049261
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5			4 14,591,971
5 Multiply line 4 by line 3			5 718,815
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 4,299
7 Add lines 5 and 6			7 723,114
8 Enter qualifying distributions from Part XII, line 4			8 819,300

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b	1	4,299
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	
3	Add lines 1 and 2.	3	4,299
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	4,299
6	Credits/Payments		
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a	5,200
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	5,200
8	Enter any penalty for underpayment of estimated tax. Check here ☐ 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	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid . . . ▶	10	901
11	Enter the amount of line 10 to be Credited to 2017 estimated tax ▶ 901 Refunded ▶	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?	1a	No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? <i>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</i>	1b	No
c	Did the foundation file Form 1120-POL for this year?	1c	
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ▶ \$ _____ (2) On foundation managers ▶ \$ _____		
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ _____		
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities</i>	2	No
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? <i>If "Yes," attach a conformed copy of the changes</i>	3	No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	No
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? <i>If "Yes," attach the statement required by General Instruction T</i>	5	No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	7	Yes
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ LA _____		
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? <i>If "No," attach explanation</i> .	8b	
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)? <i>If "Yes," complete Part XIV</i>	9	No
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	10	No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	Yes	
14	The books are in care of ► ROBERT N WHITE Telephone no ► (337) 376-6254			

Located at **►** 106 WILREE 106 WILREE NEW IBERIA LA ZIP+4 **►** 70563

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ☐	15	
16	At any time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes No
See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR). If "Yes," enter the name of the foreign country ►			

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

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

5a During the year did the foundation pay or incur any amount to (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No (4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions). ☐ Yes ☒ No (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No b If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? ☐ Yes ☒ No Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐ c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No If "Yes," attach the statement required by Regulations section 53.4945–5(d)	5b		
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ Yes ☒ No If "Yes" to 6b, file Form 8870	6b		No
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ Yes ☒ No	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 (see instructions).				
(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
ROBERT N WHITE 106 WILREE NEW IBERIA, LA 70563	PRESIDENT 000 00	0	0	0
ANNETTE F WHITE 106 WILREE NEW IBERIA, LA 70563	SECRETARY 000 00	0	0	0
KEITH WHITE 106 WILREE NEW IBERIA, LA 70563	VICE-PRESIDE 000 00	0	0	0
R MARC WHITE 106 WILREE NEW IBERIA, LA 70563	VICE-PRESIDE 000 00	0	0	0
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	Title, and average hours per week (b) devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
NONE				
Total number of other employees paid over \$50,000. ▶				

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

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

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

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 N/A	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3 ▶	

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	13,736,816
b	Average of monthly cash balances.	1b	1,077,368
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	14,814,184
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets.	2	
3	Subtract line 2 from line 1d.	3	14,814,184
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	222,213
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	14,591,971
6	Minimum investment return. Enter 5% of line 5.	6	729,599

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	729,599
2a	Tax on investment income for 2016 from Part VI, line 5.	2a	4,299
b	Income tax for 2016 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	4,299
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	725,300
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	725,300
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	725,300

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	819,300
b	Program-related investments—total from Part IX-B.	1b	
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	819,300
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions).	5	4,299
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	815,001

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2015	(c) 2015	(d) 2016
1 Distributable amount for 2016 from Part XI, line 7				725,300
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only.			556,936	
b Total for prior years 20____, 20____, 20____				
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.				
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ <u>819,300</u>				
a Applied to 2015, but not more than line 2a			556,936	
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2016 distributable amount.				262,364
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b Taxable amount—see instructions				
e Undistributed income for 2015 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2017				462,936
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).				
8 Excess distributions carryover from 2011 not applied on line 5 or line 7 (see instructions).				
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9				
a Excess from 2012.				
b Excess from 2013.				
c Excess from 2014.				
d Excess from 2015.				
e Excess from 2016.				

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

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

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

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

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

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

1 Information Regarding Foundation Managers:

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

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

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

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

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

ANNETTE F WHITE
PO BOX 10555
NEW IBERIA, LA 705620555
(337) 365-3756

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

THE APPLICATION SHOULD BE IN WRITTEN FORM WITH DETAIL EXPLANATIONS OF CHARITABLE ACTIVITIES

c Any submission deadlines

APPLICATIONS ARE ACCEPTED CONTINUOUSLY

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

CONTRIBUTIONS ARE LIMITED TO ORGANIZATIONS OPERATED EXCLUSIVELY FOR CHARITABLE, SCIENTIFIC AND EDUCATIONAL PURPOSES, WITHIN THE MEANING OF SECT 501(C)(3)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> See Additional Data Table				
Total			3a	819,300
b <i>Approved for future payment</i>				
Total			3b	

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments. . . .					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities. . . .			14	414,427	
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			26	17,728	198
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a _____					
b _____					
c _____					
d _____					
e _____					
12 Subtotal Add columns (b), (d), and (e). .				432,155	198
13 Total. Add line 12, columns (b), (d), and (e).			13		432,353

(See worksheet in line 13 instructions to verify calculations)

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

[illegible]

Part XVII

- | | Yes | No |
|-------|-----|----|
| 1a(1) | | No |
| 1a(2) | | No |
| 1b(1) | | No |
| 1b(2) | | No |
| 1b(3) | | No |
| 1b(4) | | No |
| 1b(5) | | No |
| 1b(6) | | No |
| 1c | | No |

[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

May the IRS discuss this return with the preparer shown below (see instr)? ☐ Yes ☐ No

Print/Type preparer's name KRISTIE C BOUDREAUX CPA	Preparer's Signature	Date 2017-05-09	Check if self-employed ☒	PTIN P01285887
Firm's name ▶ BOUDREAUX & HEBERT CPAS LLC				Firm's EIN ▶ 27-3982261
Firm's address ▶ 2020 W PINHOOK RD STE 106 LAFAYETTE, LA 70508				Phone no (337) 236-9992

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ACADIAN BAPTIST CENTER 1202 ACADEMY DRIVE EUNICE, LA 70535	NONE	CHARITABLE	BAPTIST CHURCH	15,000
AIM HIGH FOUNDATION 101 UNIVERSITY BLVD STE DENVER, CO 80206	NONE	CHARITABLE	CHARITABLE OPERATIONS	1,000
AMERICAN CANCER SOCIETY PO BOX 22718 OKLAHOMA CITY, OK 73123	NONE	CHARITABLE	CANCER RESEARCH	1,000
AMERICAN CENTER FOR LAW PO BOX 450349 ATLANTA, GA 31145	NONE	CHARITABLE	RELIGIOUS FREEDOM	2,000
AMERICAN FAMILY ASSOC PO DRAWER 2440 TUPELO, MS 38803	NONE	CHARITABLE	CHARITABLE OPERATIONS	15,000
AMERICAN HEART ASSOC 7272 GREENVILLE AVE DALLAS, TX 75231	NONE	CHARITABLE	EDUCATION OF HEART HEALTH	2,000
AMERICAN LUNG ASSOCIATION 1301 PENNSYLVANIA AVE WASHINGTON, DC 20004	NONE	CHARITABLE	EDUCATION OF LUNG HEALTH	1,000
CROSS TRAINING INTERNATIONAL PO BOX 31 REMOND, WA 980730031	NONE	CHARITABLE	TRAIN CHRISTIAN SOLDIERS	12,000
BAYLOR CLINIC 6620 MAIN STREET HOUSTON, TX 77030	NONE	CHARITABLE	MEDICAL EDUCATION	5,000
BRIDGES FOR PEACE PO BOX 410037 MELBOURNE, FL 32941	NONE	CHARITABLE	CHARITABLE OPERATIONS	4,000
CAPITOL MINISTRIES 1894 HIGHWAY 50E 4-117 CARSON CITY, NV 89701	NONE	CHARITABLE	DELIVERING GOSPEL TO POLITICAL LEADE	8,000
DISABLE AMERICAN VETERANS 3725 ALEXANDRIA PIKE COLD SPRING, KY 41076	NONE	CHARITABLE	ASSIST DISABLE VETERANS	1,000
FOCUS ON THE FAMILY 8605 EXPLORER DRIVE COLORADO SPRINGS, CO 80920	NONE	CHARITABLE	HELPING FAMILIES THRIVE	12,000
GOSPEL FOR ASIA 1800 GOLDEN TRAIL CT CARROLLTON, TX 75010	NONE	CHARITABLE	MINISTRY IN ASIA	12,000
SAMARITAN'S PURSE PO BOX 3000 BOONE, NC 28607	NONE	CHARITABLE	PROVIDE AID TO HURTING PEOPLE	112,000
Total ► 3a				819,300

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
HELP THE HELPERS 607 VICTORY DRIVE NEW IBERIA, LA 70563	NONE	CHARITABLE	CHRISTIAN ASSISTANCE ORGANIZATION	5,000
HIGHLAND BAPTIST SCHOOL 708 ANGERS STREET NEW IBERIA, LA 70563	NONE	CHARITABLE	RELIGIOUS EDUCATION	240,000
IBERIA COUNCIL ON AGING 126 WASHINGTON STREET NEW IBERIA, LA 70560	NONE	CHARITABLE	ASSIST ELDERLY	4,000
IBERIA PREGNANCY RESOURCES CTR 224 NORTH LEWIS ST STEA NEW IBERIA, LA 70563	NONE	CHARITABLE	WOMEN PREGNANCY ASSISTANCE	15,000
LA BAPTIST CHILDREN'S HOM PO BOX 4196 MONROE, LA 71211	NONE	CHARITABLE	ASSIST CHILDREN & FAMILIES IN NEED	8,000
LA EASTER SEALS 1010 COMMON ST STE 200 NEW ORLEANS, LA 70112	NONE	CHARITABLE	CHARITABLE OPERATIONS	1,000
LOUISIANA COLLEGE 1140 COLLEGE DRIVE PINEVILLE, LA 71360	NONE	CHARITABLE	HIGHER EDUCTION	100,000
THE VOICE OF THE MARTYRS PO BOX 443 BARTLESVILLE, OK 740050443	NONE	CHARITABLE	SERVING PERSECUTED CHRISTIANS	10,000
MD ANDERSON CANCER CTR 1515 HOLCOMBE BLVD HOUSTON, TX 77030	NONE	CHARITABLE	CANCER RESEARCH	5,000
MARCH OF DIMES 1275 MAMARONECK AVENUE WHITE PLAINS, NY 10605	NONE	CHARITABLE	BIRTH DEFECTS RESEARCH	500
NORTH AMERICAN MISSION BD 4200 NORTH POINT PARKWAY ALPHARETTA, GA 30022	NONE	CHARITABLE	MISSIONS & TRAINING OF MISSIONARIES	20,000
PROCLAIMING THE GOSPEL PO BOX 940871 PLANO, TX 75023	NONE	CHARITABLE	PROCLAIMING THE GOSPEL	4,000
RADIO BIBLE CLASS PO BOX 2222 GRAND RAPIDS, MI 49501	NONE	CHARITABLE	RADIO BIBLE SHOW	2,000
SOCIAL SERVICE CENTER 607 VICTORY DRIVE NEW IBERIA, LA 70563	NONE	CHARITABLE	CHARITABLE OPERATIONS	12,000
SOLOMON HOUSE 635 ANGIER AVE NE ATLANTA, GA 30308	NONE	CHARITABLE	TRANSITIONAL HOME	8,000
Total ► 3a				819,300

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
ST FRANCIS DINER 1201 S HOPKINS STREET NEW IBERIA, LA 70560	NONE	CHARITABLE	MEALS FOR HOMELESS	8,000
THE BREAST FOUNDATION 60 EAST 56TH STREET 8TH NEW YORK, NY 10022	NONE	CHARITABLE	BREAST CANCER RESEARCH	5,000
THE GIDEON'S INTERNATIONA PO BOX 140800 NASHVILLE, TN 37214	NONE	CHARITABLE	MISSIONARY WORK	4,000
THE HERITAGE FOUNDATION 214 MASSACHUSETTS AVE NE WASHINGTON, DC 20002	NONE	CHARITABLE	RESEARCH & EDUCATIONAL INSTITUTE	6,000
THE MAIL BOX CLUB 404 EAGER RD VALDOSTA, GA 31602	NONE	CHARITABLE	BIBLE CORRESPONDENCE EDUCATION	4,000
BILLY GRAHAM EVANGELISTIC ASSOC 1 BILLY GRAHAM PARKWAY CHARLOTTE, NC 28201	NONE	CHARITABLE	PROCLAIM THE GOSPEL OF JESUS	10,000
WORLD HUNGER RELIEF PO BOX 639 ELM MOTT, TX 76640	NONE	CHARITABLE	CHRISTIAN RELIGIOUS ORANIZATION	12,000
ZION'S HOPE PO BOX 121048 CLERMONT, FL 34711	NONE	CHARITABLE	CHARITABLE OPERATIONS	20,000
MARANATHA EVANGELESTIC MINISTRIES 224 AL GIST RD LONGVILLE, LA 70652	NONE	CHARITABLE	CHRIST-CENTERED MINISTRY	5,000
AMERICAN BIBLE SOCIETY 1865 BROADWAY NEW YORK, NY 10023	NONE	CHARITABLE	SPREADS MESSAGE OF THE BIBLE	4,800
FIRST BAPTIST CHRISTIAN SCHOOL 201 WEST CONVENT ST LAFAYETTE, LA 70501	NONE	CHARITABLE	RELIGIOUS EDUCATION	3,000
UNITED WAY 449 E ST PETER STREET NEW IBERIA, LA 70560	NONE	CHARITABLE	DISASTER ASSISTANCE	100,000
Total ► 3a				819,300

TY 2016 Accounting Fees Schedule**Name:** THE BEN E FACTOR FOUNDATION**EIN:** 72-1086995

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	2,013	2,013		

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2016 Gain/Loss from Sale of Other Assets Schedule

Name: THE BEN E FACTOR FOUNDATION

EIN: 72-1086995

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
VANGUARD INFLATION PROTECTED		PURCHASE	2016-02		2,222	2,190			32	
VANGUARD INFLATION PROTECTED		PURCHASE	2016-02		21,532	22,895			-1,363	
VANGUARD INFLATION PROTECTED		PURCHASE	2016-02		265,779	264,250			1,529	

TY 2016 Investments Corporate Stock Schedule**Name:** THE BEN E FACTOR FOUNDATION**EIN:** 72-1086995

Name of Stock	End of Year Book Value	End of Year Fair Market Value
AMERICAN INTL GP 21WTS	4,551	
AMERICAN INTL GROUP INC	23,838	
AT&T INC NEW	538,983	
ATMOS ENERGY CORP	763,374	
CHEVRON	540,832	
COCA COLA COMPANY	691,221	
COLGATE-PALMOLIVE CO	722,196	
CONSOLIDATED EDISON INC	773,566	
DUKE ENERGY CORP NEW	1,257,754	
EXXON MOBIL CORPORATION	1,037,990	
GENERAL MILLS INC	642,161	
JOHNSON & JOHNSON	835,733	
THE SOUTHERN COMPANY	725,880	
VANGUARD INFLATION		
VERIZON COMMUNICATIONS	524,459	
SPDR GOLD TRUST	602,855	
VANGUARD INTERIM TERM	454,381	
SIT US GOVT. SEC FUND	589,251	
VANGUARD INTERIM INDEX AD	925,084	
VANGUARD LONG TERM TRSY	549,324	
PROSHARES S&P 500 DIV	161,730	

TY 2016 Investments Government Obligations Schedule**Name:** THE BEN E FACTOR FOUNDATION**EIN:** 72-1086995**US Government Securities - End
of Year Book Value:**

1,272,635

**US Government Securities - End
of Year Fair Market Value:****State & Local Government
Securities - End of Year Book
Value:****State & Local Government
Securities - End of Year Fair
Market Value:**

TY 2016 Other Expenses Schedule**Name:** THE BEN E FACTOR FOUNDATION**EIN:** 72-1086995**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXPENSES				
ADMINISTRATIVE EXPENSES	200	200		

TY 2016 Other Increases Schedule

Name: THE BEN E FACTOR FOUNDATION
EIN: 72-1086995

Description	Amount
UNREALIZED GAIN	943,854

TY 2016 Taxes Schedule**Name:** THE BEN E FACTOR FOUNDATION**EIN:** 72-1086995

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL INCOME TAXES PAID	4,298			