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

Name of foundation SAN ANGELO HEALTH FOUNDATION		A Employer identification number 75-1315145	
Number and street (or P O box number if mail is not delivered to street address) P O BOX 3550		Room/suite	B Telephone number (see instructions) (325) 486-0185
City or town, state or province, country, and ZIP or foreign postal code SAN ANGELO, TX 76902		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) \$ 58,484,649		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
J Accounting method ☐ Cash ☒ Accrual ☐ Other (specify) (Part I, column (d) must be on cash basis)			

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)	1,150			
	2 Check ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	140	140		
	4 Dividends and interest from securities	41,671	2,016,467		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	568,903			
	b Gross sales price for all assets on line 6a 7,006,142				
	7 Capital gain net income (from Part IV, line 2)		499,415		
	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)	1,311,757	39,471		
	12 Total. Add lines 1 through 11	1,923,621	2,555,493		
	13 Compensation of officers, directors, trustees, etc	186,500	15,480		171,021
	14 Other employee salaries and wages	65,000	1,885		63,115
	15 Pension plans, employee benefits	21,560	1,484		20,076
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	34,700	17,329		17,329
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	17,918	3,931		13,987
	19 Depreciation (attach schedule) and depletion	117,233	0		
	20 Occupancy	12,124	837		11,287
	21 Travel, conferences, and meetings	21,714	1,499		20,215
	22 Printing and publications	5,476	0		5,476
	23 Other expenses (attach schedule)	339,142	296,826		49,458
	24 Total operating and administrative expenses. Add lines 13 through 23	821,367	339,271		371,964
	25 Contributions, gifts, grants paid	2,344,866			2,304,636
	26 Total expenses and disbursements. Add lines 24 and 25	3,166,233	339,271		2,676,600
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-1,242,612			
	b Net investment income (if negative, enter -0-)		2,216,222		
	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	200	201	201			
	2 Savings and temporary cash investments	105,776	263,834	263,834			
	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	16,277	24,580	24,580			
	10a Investments—U S and state government obligations (attach schedule)						
	b Investments—corporate stock (attach schedule)						
	c Investments—corporate bonds (attach schedule)						
	11 Investments—land, buildings, and equipment basis ▶ _____ 1,139,552 Less accumulated depreciation (attach schedule) ▶ _____	1,061,819	1,139,552	1,139,552			
	12 Investments—mortgage loans						
	13 Investments—other (attach schedule)	53,560,236	52,310,217	51,356,550			
	14 Land, buildings, and equipment basis ▶ _____ 5,408,760 Less accumulated depreciation (attach schedule) ▶ _____ 1,958,475	3,566,010	3,450,285	5,699,932			
15 Other assets (describe ▶ _____)	-3,189,279	-953,667	0				
16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	55,121,039	56,235,002	58,484,649				
Liabilities	17 Accounts payable and accrued expenses	21,373	80,919				
	18 Grants payable	1,639,346	1,679,576				
	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)	1,660,719	1,760,495				
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	53,460,320	54,474,507				
	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)	53,460,320	54,474,507				
31 Total liabilities and net assets/fund balances (see instructions) .	55,121,039	56,235,002					

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	53,460,320
2 Enter amount from Part I, line 27a	2	-1,242,612
3 Other increases not included in line 2 (itemize) ▶ _____	3	2,256,799
4 Add lines 1, 2, and 3	4	54,474,507
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	54,474,507

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)
1 a WESTWOOD COMMON FUND	P	2016-01-01	2016-12-31
b			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 7,006,142		6,506,727	499,415
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			499,415
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	499,415
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		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	1,819,978	58,632,883	0 031040
2014	3,852,439	60,499,793	0 063677
2013	2,684,689	58,883,581	0 045593
2012	2,085,982	54,886,778	0 038005
2011	2,691,651	54,902,166	0 049026

2 Total of line 1, column (d)	2	0 227341
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 045468
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	56,803,315
5 Multiply line 4 by line 3	5	2,582,733
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	22,162
7 Add lines 5 and 6	7	2,604,895
8 Enter qualifying distributions from Part XII, line 4	8	2,676,600

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	22,162
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	22,162
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	22,162
6	Credits/Payments		
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a	40,731
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	40,731
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	18,569
11	Enter the amount of line 10 to be Credited to 2017 estimated tax ▶ 18,569 Refunded ▶	11	0

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	No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (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? <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	No
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) ▶ TX		
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	Yes
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 ▶ <u>sahfoundation.org</u>	13	Yes	
14	The books are in care of ▶ <u>OLIVER RAINEY WOJTEK</u> Telephone no ▶ <u>(325) 942-6713</u>			

Located at **▶** 2909 SHERWOOD WAY STE 300 SAN ANGELO TX ZIP+4 **▶** 76901

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 ▶ <u>15</u>	15		
16	At any time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes," enter the name of the foreign country ▶	16	Yes	No

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

1a	During the year did the foundation (either directly or indirectly)		Yes	No
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? ☐ Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐	1b		
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2016? ☐	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016? ☐ Yes ☒ No If "Yes," list the years ▶ <u>20</u> , <u>20</u> , <u>20</u> , <u>20</u>			
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 ▶ <u>20</u> , <u>20</u> , <u>20</u> , <u>20</u>			
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)? ☐ Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐	5b		
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 <i>If "Yes," attach the statement required by Regulations section 53.4945–5(d)</i>			
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 <i>If "Yes" to 6b, file Form 8870</i>	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
See Additional Data Table				
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	Title, and average hours per week (b) devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
DEBORAH WATSON PO BOX 3550 SAN ANGELO, TX 76902	VICE PRESIDENT OF OP 40 00	65,000	4,550	0
Total number of other employees paid over \$50,000. ▶				0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)
3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
WESTWOOD TRUST	INVESTMENT FEES	205,487
200 CRESCENT COURT SUITE 1200 DALLAS, TX 75201		
Total number of others receiving over \$50,000 for professional services. ►		0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3 ►	0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities.	1a	50,660,246
b	Average of monthly cash balances.	1b	128,567
c	Fair market value of all other assets (see instructions).	1c	6,879,527
d	Total (add lines 1a, b, and c).	1d	57,668,340
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	57,668,340
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	865,025
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	56,803,315
6	Minimum investment return. Enter 5% of line 5.	6	2,840,166

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	2,840,166
2a	Tax on investment income for 2016 from Part VI, line 5.	2a	22,162
b	Income tax for 2016 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	22,162
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	2,818,004
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	2,818,004
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	2,818,004

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	2,676,600
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	2,676,600
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	22,162
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	2,654,438

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				2,818,004
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only.			1,180,137	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2016				
a From 2011.				
b From 2012.				
c From 2013.				
d From 2014.				
e From 2015.				
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ <u>2,676,600</u>				
a Applied to 2015, but not more than line 2a			1,180,137	
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.				1,496,463
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2016 (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:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
b Prior years' undistributed income Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2015 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2017				1,321,541
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2011 not applied on line 5 or line 7 (see instructions).	0			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	0			
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 TOM EARLY PO BOX 3550 SAN ANGELO, TX 769023550 (325) 486-0185 tomearly@sahfoundation.org	
b The form in which applications should be submitted and information and materials they should include SEE WEB SITE AT WWW.SAHFOUNDATION.ORG	
c Any submission deadlines 2-3 MONTHS PRIOR TO WHEN A DECISION IS NEEDED	
d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors SAN ANGELO, TEXAS AREA	

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	2,304,636
b <i>Approved for future payment</i>				
Total			3b	0

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			14	140	
4 Dividends and interest from securities. . . .			14	41,671	
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.			01	1,311,757	
8 Gain or (loss) from sales of assets other than inventory			14	568,903	
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). .		0		1,922,471	0
13 Total. Add line 12, columns (b), (d), and (e).			13		1,922,471

(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

**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

**Paid
Preparer
Use Only**

Print/Type preparer's name Michelle M Perkey CPA	Preparer's Signature	Date	Check if self-employed ☐	PTIN P01226468
Firm's name ► OLIVER RAINEY & WOJTEK LLP				Firm's EIN ► 75-2138464
Firm's address ► 2909 Sherwood Way Suite 300 San Angelo, TX 76901				Phone no (325) 942-6713

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

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
MIKE BOYD	Chairman 4 00	0	0	0
PO BOX 3550 SAN ANGELO, TX 76902				
JOE B WILKINSON MD	Trustee 2 00	0	0	0
PO BOX 3550 SAN ANGELO, TX 76902				
DAVID LUPTON	Treasurer 4 00	0	0	0
PO BOX 3550 SAN ANGELO, TX 76902				
SANDE VINCENT HARRISON	TRUSTEE 2 00	0	0	0
PO BOX 3550 SAN ANGELO, TX 76902				
DEVIN BATES	Trustee 2 00	0	0	0
PO BOX 3550 SAN ANGELO, TX 76902				
T RICHEY OLIVER CPA	Trustee 2 00	0	0	0
PO BOX 3550 SAN ANGELO, TX 76902				
JAMES P CUMMINGS	Trustee 2 00	0	0	0
PO BOX 3550 SAN ANGELO, TX 76902				
MARY JANE STEADMAN	Secretary 2 00	0	0	0
PO BOX 3550 SAN ANGELO, TX 76902				
MARILYN ABOUSSIE	VICE CHAIRMAN 4 00	0	0	0
PO BOX 3550 SAN ANGELO, TX 76902				
HUGH LAMAR STONE III	Trustee 2 00	0	0	0
PO BOX 3550 SAN ANGELO, TX 76902				
JOANNE RICE	Trustee 2 00	0	0	0
PO BOX 3550 SAN ANGELO, TX 76902				
ROBERT S PATYRAK MD	Trustee 4 00	0	0	0
PO BOX 3550 SAN ANGELO, TX 76902				
STEVE CECIL	Trustee 2 00	0	0	0
PO BOX 3550 SAN ANGELO, TX 76902				
TOM EARLY	PRESIDENT 40 00	186,500	13,055	0
PO BOX 3550 SAN ANGELO, TX 76902				
CARLOS RODRIGUEZ	Trustee 2 00	0	0	0
PO BOX 3550 SAN ANGELO, TX 76902				

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

Recipient Name and address (home or business)	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
a <i>Paid during the year</i>				
ALCOHOL & DRUG ABUSE COUNCIL 3553 W HOUSTON HARTE EXPWY SAN ANGELO, TX 76901	NONE		CONSTRUCTION OF A DETOX CENTER	251,500
ANGELO STATE UNIVERSITY PO BOX 10022 ASU STATION SAN ANGELO, TX 76909	NONE		FUNDS TO BECOME A VISTA INTERMEDIARY	61,741
ASSOCIATION OF ASIAN-AMERICAN WOMEN PO BOX 60301 SAN ANGELO, TX 76906	NONE		PROGRAM EXPANSION	5,000
BOYS AND GIRLS CLUB OF SAN ANGELO 1802 N LILLIE SAN ANGELO, TX 76903	NONE		SEASONAL GRANT	2,500
CHILDREN'S ADVOCACY CENTER OF TGC 317 KOBERLIN SAN ANGELO, TX 76903	NONE		SEASONAL GRANT	2,000
Total ▶ 3a				2,304,636

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>				
CHRISTOVAL VOLUNTEER FIRE DEPARTMENT PO BOX 193 CHRISTOVAL, TX 76935	NONE		PURCHASE A WILDFIRE TRUCK / CAB CHASSIS	55,000
CORNERSTONE CHRISTIAN SCHOOL 1502 N JEFFERSON ST SAN ANGELO, TX 76901	NONE		NEW HVAC IN GYM	18,950
CONCHO VALLEY HOME FOR GIRLS 412 PREUSSER SAN ANGELO, TX 76903	NONE		SEASONAL GRANT	2,500
ELDORADO YOUTH CORPS INC PO BOX 105 ELDORADO, TX 76936	NONE		RENOVATION TO INTERIOR AND EXTERIOR TO ESTABLISH SOUP KITCHEN AND SENIOR MEALS PROGRAM	80,767
EXPONENT PHILANTHROPY 1720 N STREET NW WASHINGTON, DC 20036	NONE		SUPPORT FOR PHILANTHROPIC MEMBERSHIP ORGANIZATION	750
Total ► 3a				2,304,636

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				
GRANTMAKERS FOR EFFECTIVE ORGANIZATIONS 1725 DESALES ST NW SUITE 404 WASHINGTON, DC 20036	NONE		SUPPORT FOR PHILANTHROPIC MEMBERSHIP ORGANIZATION	1,920
GRAPE CREEK VOLUNTEER FIRE DEPARTMENT 7912 WREN RD SAN ANGELO, TX 76901	NONE		FUNDS FOR A NEW BRUSH FIRE TRUCK	105,122
HOUSE OF FAITH 321 MONTECITO DRIVE SAN ANGELO, TX 76903	NONE		TEAM STEP FORWARD SCHOLARSHIP PROGRAM	45,952
INSTITUTE OF COGNITIVE DEVELOPMENT 20 S KOENIGHEIM ST SAN ANGELO, TX 76903	NONE		OPERATING FUNDS	71,500
JUNIOR LEAGUE OF SAN ANGELO 36 E TWOHIG AVE SUITE 100 SAN ANGELO, TX 76903	NONE		FUNDS FOR THE "STUDENT CLOSET" CLOTHING PROGRAM	2,500
Total ▶ 3a				2,304,636

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>				
MHMR OF THE CONCHO VALLEY 1501 W BEAUREGARD AVENUE SAN ANGELO, TX 76901	NONE		FUNDS TO INITIATE THE AUTISM BEHAVIORAL CENTER	85,750
MOSAIC REDWINE CHILDCARE CENTER 5191 S BRYANT BLVD SAN ANGELO, TX 76904	NONE		SEASONAL GRANT	2,500
PHILANTHROPY SOUTHWEST 8350 N CENTRAL EXPY DALLAS, TX 75206	NONE		SUPPORT FOR PHILANTHROPIC MEMBERSHIP ORGANIZATION	3,300
PROJECT JANUS INC 2824 SHERWOOD WAY SAN ANGELO, TX 76901	NONE		RESEARCH AND RESOURCE BOOKS FOR DIRECT SUPPORT PROFESSIONALS FOR IDD/MI	37,300
SALVATION ARMY 215 GILLIS SAN ANGELO, TX 76903	NONE		SEASONAL GRANT	4,000
Total ▶ 3a				2,304,636

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>				
SAN ANGELO AREA FOUNDATION 221 S IRVING ST SAN ANGELO, TX 76903	NONE		SAN ANGELO GIVES AMPLIFICATION FUND	25,000
SAN ANGELO CIVIC BALLET 82 GILLIS ST SAN ANGELO, TX 76903	NONE		PURCHASE FURNITURE, FIXTURES AND EQUIPMENT FOR NEW FACILITY AT THE PERFORMING ARTS CENTER	33,873
SAN ANGELO EARLY CHILDHOOD CENTER 619 JULIAN ST SAN ANGELO, TX 76903	NONE		SEASONAL GRANT	1,500
SAN ANGELO PERFORMING ARTS COALITION 82 GILLIS ST SAN ANGELO, TX 76903	NONE		PURCHASE FURNITURE, FIXTURES AND EQUIPMENT FOR THE PERFORMING ARTS CENTER	200,000
THE ARC OF SAN ANGELO 3180 EXECUTIVE DRIVE 112 SAN ANGELO, TX 76904	NONE		OPERATING FUNDS	25,000
Total ▶ 3a				2,304,636

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>				
VOLUNTEER SERVICES COUNCIL FOR THE SAN ANGELO STATE SCHOOL PO BOX 38 CARLSBAD, TX 76934	NONE		SEASONAL GRANT	5,000
WESLEY TRINITY DAILY BREAD PROGRAM 301 WEST 18TH STREET SAN ANGELO, TX 76903	NONE		PURCHASE AN ADDITIONAL WALK-IN FREEZER	19,909
WEST TEXAS BOYS RANCH 10223 BOYS RANCH ROAD SAN ANGELO, TX 76904	NONE		OPERATING FUNDS FOR SONRISAS TRAILS THERAPEUTIC RIDING PROGRAM AND FUNDS TO UPGRADE PHONE SYSTEM	74,849
YOUNG LIFE SAN ANGELO PO BOX 61816 SAN ANGELO, TX 76906	NONE		MINISTRY FOR TEEN MOTHERS, RENOVATIONS TO RUST STREET MINISTRIES FACILITY TO RELOCATE THEIR AGENCY	305,000
BALLINGER MEMORIAL HOSPITAL 608 AVENUE B BALLINGER, TX 76821	NONE		UPGRADE RADIOLOGY EQUIPMENT	181,557
Total 3a				2,304,636

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>				
CONCHO CHRISTMAS CELEBRATION PO BOX 1991 SAN ANGELO, TX 76902	NONE		INSTALL TWO PERMANENT ELECTRICAL POWER PEDESTALS AND FABRICATE TWENTY NEW POINSETTA FLOWERS	17,493
WEST TEXAS COUNSELING AND GUIDANCE 36 E TWOHIG AVE SAN ANGELO, TX 76903	NONE		CONSTRUCTION OF A COUNSELING FACILITY AND SUICIDE PREVENTION PROGRAM	480,460
WEST TEXAS REHABILITATION CENTER 3001 S JACKSON ST SAN ANGELO, TX 76904	NONE		EQUIPMENT FOR THE PACESETTERS PROGRAM, AUDIOLOGY, AND ORTHOTICS/PROSTHETICS DEPT	99,750
COOK CHILDREN'S HEALTH FOUNDATION 801 7TH AVENUE FORT WORTH, TX 76104	NONE		REFUND OF PRIOR YEAR GRANT	-5,307
Total ► 3a				2,304,636

TY 2016 Accounting Fees Schedule**Name:** SAN ANGELO HEALTH FOUNDATION**EIN:** 75-1315145

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	17,700	8,829		8,829
AUDIT AND TAX RETURN FEES	17,000	8,500		8,500

TY 2016 Investments - Other Schedule**Name:** SAN ANGELO HEALTH FOUNDATION**EIN:** 75-1315145

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
INVESTMENT SECURITIES	AT COST	52,310,217	51,356,550

TY 2016 Other Assets Schedule

Name: SAN ANGELO HEALTH FOUNDATION

EIN: 75-1315145

Other Assets Schedule

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
UNREALIZED GAIN/(LOSS) ON INVESTMENTS	-3,189,279	-953,667	

TY 2016 Other Expenses Schedule**Name:** SAN ANGELO HEALTH FOUNDATION**EIN:** 75-1315145**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT FEES	277,788	205,487		0
INSURANCE	21,710	10,855		10,855
DUES AND SUBSCRIPTIONS	1,317	91		1,226
POSTAGE	412	28		384
OTHER EXPENSE	1,334	92		1,242
OFFICE EXPENSES	1,879	130		1,749
TELEPHONE & WEB PAGE	5,469	378		5,091
REPAIRS AND MAINTENANCE	12,932	907		12,226
SERVICE CONTRACTS	16,301	1,125		15,176
CAPITAL EXPENDITURES	0	77,733		1,509

TY 2016 Other Income Schedule**Name:** SAN ANGELO HEALTH FOUNDATION**EIN:** 75-1315145**Other Income Schedule**

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
ROYALTY INCOME	38,629	38,629	0
OTHER INCOME	842	842	0
PASSTHROUGH INVESTMENT INCOME	1,244,037	0	0
CHANGE IN ACCRUED INCOME	7,348	0	0
EXCISE TAX ADJUSTMENT	20,901	0	0

TY 2016 Other Increases Schedule

Name: SAN ANGELO HEALTH FOUNDATION
EIN: 75-1315145

Description	Amount
NET UNREALIZED GAIN OR LOSSES ON INVESTMENTS	2,256,799

TY 2016 Taxes Schedule**Name:** SAN ANGELO HEALTH FOUNDATION**EIN:** 75-1315145

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PROPERTY TAXES	2,894	2,894		0
PAYROLL TAX	15,024	1,037		13,987