

efile GRAPHIC print - DO NOT PROCESS		As Filed Data -		DLN: 93491314010587		
Form 990-PF Department of the Treasury Internal Revenue Service		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. ▶ Information about Form 990-PF and its instructions is at www.irs.gov/form990pf.			OMB No 1545-0052 2016 Open to Public Inspection	
For calendar year 2016, or tax year beginning 01-01-2016, and ending 12-31-2016						
Name of foundation RUDI SCHULTE FAMILY FOUNDATION				A Employer identification number 77-0452600		
Number and street (or P O box number if mail is not delivered to street address) PO BOX 60921			Room/suite			
B Telephone number (see instructions) (805) 452-8114						
City or town, state or province, country, and ZIP or foreign postal code SANTA BARBARA, CA 93160				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)▶\$ 10,439,717		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)				
	2	Check ☒ if the foundation is not required to attach Sch B				
	3	Interest on savings and temporary cash investments		41	41	
	4	Dividends and interest from securities		221,737	221,737	
	5a	Gross rents				
	b	Net rental income or (loss) _____				
	6a	Net gain or (loss) from sale of assets not on line 10		77,028		
	b	Gross sales price for all assets on line 6a 77,273				
	7	Capital gain net income (from Part IV, line 2)			77,028	
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances _____				
b	Less Cost of goods sold					
c	Gross profit or (loss) (attach schedule)					
11	Other income (attach schedule)					
12	Total. Add lines 1 through 11		298,806	298,806		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc		0	0	0
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)		300	150	150
	b	Accounting fees (attach schedule)		10,438	5,219	5,219
	c	Other professional fees (attach schedule)		61,283	61,283	0
	17	Interest				
	18	Taxes (attach schedule) (see instructions)		7,050	3,550	0
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)		2,580	1,576	1,004
	24	Total operating and administrative expenses. Add lines 13 through 23		81,651	71,778	6,373
	25	Contributions, gifts, grants paid		407,700		407,700
26	Total expenses and disbursements. Add lines 24 and 25		489,351	71,778	414,073	
	27	Subtract line 26 from line 12				
	a	Excess of revenue over expenses and disbursements		-190,545		
	b	Net investment income (if negative, enter -0-)			227,028	
c	Adjusted net income(if negative, enter -0-)					
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				Form 990-PF (2016)		

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 (a) Book Value	End of year (b) Book Value (c) Fair Market Value		
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	407,867	413,726	413,726
	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)	40	40	40
	7	Other notes and loans receivable (attach schedule) ▶ _____ 552,427 Less allowance for doubtful accounts ▶ _____ 0	588,264	552,427	552,427
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	1,624,872	1,424,745	1,947,277
	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)	7,574,274	7,613,688	7,526,101
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)	0	146	146	
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	10,195,317	10,004,772	10,439,717	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☒ and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted	10,195,317	10,004,772	
	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)	10,195,317	10,004,772	
31	Total liabilities and net assets/fund balances (see instructions) .	10,195,317	10,004,772		

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	10,195,317
2	Enter amount from Part I, line 27a	2	-190,545
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	10,004,772
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	10,004,772

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 FIDELITY #119		2016-01-01	2016-12-31
b FIDELITY #119		2016-01-01	2016-12-31
c CAPITAL GAINS DIVIDENDS	P		
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 40,282			40,282
b		245	-245
c 36,991			36,991
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			40,282
b			-245
c			36,991
d			
e			

2 Capital gain net income or (net capital loss)	2	77,028
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	413,445	10,738,662	0 038501
2014	467,629	11,092,885	0 042156
2013	424,274	10,758,387	0 039437
2012	398,256	10,380,817	0 038365
2011	419,290	10,130,639	0 041388

2 Total of line 1, column (d)	2	0 199847
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 039969
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	10,133,390
5 Multiply line 4 by line 3	5	405,021
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	2,270
7 Add lines 5 and 6	7	407,291
8 Enter qualifying distributions from Part XII, line 4	8	414,073

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	2,270
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3	Add lines 1 and 2.	3	2,270
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	2,270
6	Credits/Payments		
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a	3,262
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	3,200
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d.	7	6,462
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	4,192
11	Enter the amount of line 10 to be Credited to 2017 estimated tax ☐ 4,192 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	Yes
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) ☐ CA		
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 ▶ N/A	13	Yes	
14	The books are in care of ▶ PAUL SCHULTE Telephone no ▶ (805) 685-3052			

Located at ▶ PO BOX 60921 SANTA BARBARA CA ZIP+4 ▶ 93160

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 ▶ 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		No
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 ▶ 2015, 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	Yes	
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		No
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

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	5b	
	Organizations relying on a current notice regarding disaster assistance check here.	☐		
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	☐ 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	6b	No
	<i>If "Yes" to 6b, file Form 8870</i>			
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	

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

[illegible][illegible]

Total number of other employees paid over \$50,000.	0
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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)
3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

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

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1	
2	
3	
4	

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

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities.	1a	8,340,837
b	Average of monthly cash balances.	1b	398,484
c	Fair market value of all other assets (see instructions).	1c	1,548,385
d	Total (add lines 1a, b, and c).	1d	10,287,706
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	10,287,706
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	154,316
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	10,133,390
6	Minimum investment return. Enter 5% of line 5.	6	506,670

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	506,670
2a	Tax on investment income for 2016 from Part VI, line 5.	2a	2,270
b	Income tax for 2016 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	2,270
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	504,400
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	504,400
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	504,400

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	414,073
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	414,073
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	2,270
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	411,803

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				504,400
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only.			458,076	
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 ▶ \$ 414,073				
a Applied to 2015, but not more than line 2a			414,073	
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	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			44,003	
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2017				504,400
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.				

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

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.)

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

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

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

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

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

- c** Any submission deadlines

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

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> See Additional Data Table				
Total			3a	407,700
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	41	
4 Dividends and interest from securities. . . .			14	221,737	
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			18	77,028	
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		298,806	0
13 Total. Add line 12, columns (b), (d), and (e).			13		298,806

(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 CATHERINE MACAULAY	Preparer's Signature	Date	Check if self-employed ► ☐	PTIN P00178796
Firm's name ► DAMITZ BROOKS NIGHTINGALE				Firm's EIN ► 77-0076647
Firm's address ► 200 EAST CARRILLO STREET SUITE 303 SANTA BARBARA, CA 93101				Phone no (805) 963-1837

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
PAUL S SCHULTE	PRESIDENT 1 00	0	0	0
200 E CARRILLO STE 303 SANTA BARBARA, CA 93101				
PETER R SCHULTE	VICE PRESIDENT 1 00	0	0	0
200 E CARRILLO STE 303 SANTA BARBARA, CA 93101				
SYLVIA M MOLONY	ASSISTANT VP 1 00	0	0	0
200 E CARRILLO STE 303 SANTA BARBARA, CA 93101				
HENRY G SCHULTE	SECTRY / TRSR 1 00	0	0	0
200 E CARRILLO STE 303 SANTA BARBARA, CA 93101				
MARK M AIJIAN	DIRECTOR 1 00	0	0	0
200 E CARRILLO STE 303 SANTA BARBARA, CA 93101				

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>				
AHA ATTITUDE HARMONY ACHIEVEMENT 1209 DE LA VINA STREET SUITE A SANTA BARBARA, CA 93101	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	500
ALOHA SPIRIT SB PO BOX 6431 SANTA BARBARA, CA 93160	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	1,000
ALPHA RESOURCE CENTER OF SANTA BARBARA 4501 CATHEDRAL OAKS RD SANTA BARBARA, CA 93110	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	2,500
AMERICAN CANCER SOCIETY 1432 CHAPALA ST SANTA BARBARA, CA 93101	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	1,000
AMERICAN HEART ASSOCIATION 7272 GREENVILLE AVENUE DALLAS, TX 75231	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	800
Total ► 3a				407,700

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>				
ANGELS FOSTER FAMILY NETWORK 9295 FARNHAM STREET SUITE 200 SAN DIEGO, CA 92123	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	5,300
ANIMAL RESCUE TEAM INC 875 CARRIAGE DRIVE SOLVANG, CA 93463	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	2,000
ARIEL THEATRICAL INC 320 MAIN STREET SALINAS, CA 93901	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	15,000
BISHOP GARCIA DIEGO HIGH SCHOOL 4000 LA COLINA ROAD SANTA BARBARA, CA 93110	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	54,000
BUILDON PO BOX 16741 STAMFORD, CT 06905	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	10,000
Total ► 3a				407,700

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>				
CALIFORNIA BOATING SAFETY OFFICERS ASSOCIATION PO BOX 7 VENTURA, CA 93002	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	500
CALIFORNIA SURF LIFESAVING ASSOCIATION PO BOX 366 HUNTINGTON BEACH, CA 92648	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	500
CARRIAGE AND WESTERN ART MUSEUM OF SANTA BARBARA PO BOX 1587 SANTA BARBARA, CA 93102	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	3,000
CHALLENGED ATHLETES INC 9591 WAPLES STREET SAN DIEGO, CA 92121	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	5,000
CHELSEA'S LIGHT FOUNDATION 12463 RANCHO BERNARDO RD 519 SAN DIEGO, CA 92128	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	40,000
Total 3a				407,700

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>				
COURT APPOINTED SPECIAL ADVOCATES OF SANTA BARBARA COUNTY 2601 SKYWAY DRIVE SUITE A3 SANTA MARIA, CA 93455	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	500
DOCTORS WITHOUT BORDERS 333 7TH AVENUE 2ND FLOOR NEW YORK, NY 10001	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	1,000
DOMESTIC VIOLENCE SOLUTIONS FOR SANTA BARBARA COUNTY PO BOX 1536 SANTA BARBARA, CA 93102	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	2,000
DOS PUEBLOS HIGH SCHOOL 7266 ALAMEDA AVE GOLETA, CA 93117	NONE	PC	BOYS BASKETBALL	1,000
ELINGS PARK FOUNDATION 1298 LAS POSITAS ROAD SANTA BARBARA, CA 93105	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	1,500
Total 3a				407,700

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>				
ENDOWMENT FOR YOUTH COMMITTEE 606 ALAMO PINTADO RD ST 3274 SOLVANG, CA 93427	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	500
EXECUTIVE WOMEN'S GOLF ASSOCIATION INC 8895 NORTH MILITARY TRAIL STE 102E PALM BEACH GARDENS, FL 33410	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	4,500
FELLOWSHIP FOR PERFORMING ARTS 1674 BROADWAY SUITE 404 NEW YORK, NY 10019	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	800
FUTURE TRADITIONS FOUNDATION 2911 LA COMBADURA RD SANTA BARBARA, CA 93105	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	2,500
GIRL SCOUTS OF CALIFORNIA'S CENTRAL COAST 1500 PALMA DRIVE SUITE 110 VENTURA, CA 93003	NONE	PC	TROOP #505	500
Total ► 3a				407,700

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>				
GLOBAL LEADERSHIP CONNECTION PO BOX 902 SANTA YNEZ, CA 93460	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	1,500
GOLETA UNION SCHOOL DISTRICT 401 N FAIRVIEW AVE GOLETA, CA 93117	NONE	GOV	IN FURTHERANCE OF EXEMPT PURPOSE	2,000
GOLETA VALLEY BEAUTIFUL PO BOX 6756 GOLETA, CA 93160	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	500
HEMOPHILIA FOUNDATION OF SOUTHERN CALIFORNIA 959 E WALNUT ST STE 114 PASADENA, CA 91106	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	2,000
HIGGINS AND LANGLEY MEMORIAL AND EDUCATION FUND INC 12752 LEE RD TRUCKEE, CA 96161	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	3,000
Total ► 3a				407,700

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>				
HOWARD JARVIS TAXPAYERS FOUNDATION 30100 TOWN CENTER DR LAGUNA NIGUEL, CA 92677	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	5,000
INCLUDE AUTISM PO BOX 720072 SAN DIEGO, CA 92172	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	10,000
MAGIC FOUNDATION 4200 CANTERA DR SUITE 106 WARRENVILLE, IL 60555	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	3,000
MEDIA4GOOD INC 209 ANACAPA STREET SANTA BARBARA, CA 93101	NONE	PC	YOUTH INTERACTIVE	6,000
MOUNTAIN VIEW SCHOOL FOUNDATION 311 E CARRILLO STREET SANTA BARBARA, CA 93101	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	2,500
Total ▶ 3a				407,700

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>				
NATIONAL ASSOCIATION OF STATE BOATING LAW ADMINISTRATORS INC 1648 MCGRATHIANA PKWY STE 360 LEXINGTON, KY 40511	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	1,000
NATIONAL BOY SCOUTS OF AMERICA COUNCIL 1325 W WALNUT HILL IRVING, TX 75038	NONE	PC	TROOP #105	500
NATIONAL SAFE BOATING COUNCIL INC 9500 TECHNOLOGY DRIVE SUITE 104 MANASSAS, VA 20110	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	1,000
NATIONAL WATER SAFETY CONGRESS PO BOX 4132 FRANKFORT, KY 40604	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	1,000
NEW MILLENNIUM SECONDARY SCHOOL 1301 W 182ND ST GARDENA, CA 90248	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	10,000
Total 3a				407,700

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>				
NOTES FOR NOTES INCORPORATED PO BOX 90632 SANTA BARBARA, CA 93190	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	8,000
OLD MISSION SANTA INES SAINT VINCENT DE PAUL SOCIETY 1760 MISSION DRIVE PO BOX 408 SOLVANG, CA 93462	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	1,000
OLSEN MEMORIAL FUND PO BOX 60921 SANTA BARBARA, CA 93160	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	1,000
ORGANIC SOUP KITCHEN 315 MEIGS ROAD SANTA BARBARA, CA 93109	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	9,000
PACIFIC LEGAL FOUNDATION 930 G STREET SACRAMENTO, CA 95814	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	5,000
Total ▶ 3a				407,700

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>				
PAGE YOUTH CENTER 4540 HOLLISTER AVE SANTA BARBARA, CA 93110	NONE	PC	SB BALLERS	500
PANCREATIC CANCER ACTION NETWORK INC 1500 ROSECRANS AVE SUITE 200 MANHATTAN BEACH, CA 90266	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	17,500
PARC INC 3190 TYRONE BOULEVARD NORTH ST PETERSBURG, FL 33710	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	1,000
PEABODY CHARTER SCHOOL INC 3018 CALLE NOGUERA SANTA BARBARA, CA 93105	NONE	PC	SCIENCE TECHNOLOGY ENGINEERING MATH (STEM) CAMP	500
PIERRE CLAEYSSENS VETERANS MUSEUM AND LIBRARY FOUNDATION 1187 COAST VILLAGE RD STE 1 334 SANTA BARBARA, CA 93108	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	3,500
Total ► 3a				407,700

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>				
POWAY VALLEY THERAPEUTIC RIDING CENTER 13943 POWAY VALLEY RD POWAY, CA 92064	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	10,000
REEF ENVIRONMENTAL EDUCATION FOUNDATION INC PO BOX 370246 KEY LARGO, FL 33037	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	500
REINS OF HOPE PO BOX 1156 OJAI, CA 93024	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	1,000
SAN MARCOS KIDS HELPING KIDS FOUNDATION C/O P ALLMAN CPA 1018 GARDEN ST SANTA BARBARA, CA 93101	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	4,000
SAN ROQUE CONFERENCE OF SOCIETY OF SVDP 325 ARGONNE CIRCLE SANTA BARBARA, CA 93105	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	400
Total 3a				407,700

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>				
SANTA BARBARA BLUES SOCIETY PO BOX 30853 SANTA BARBARA, CA 93130	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	1,000
SANTA BARBARA CENTER FOR THE PERFORMING ARTS INC 1330 STATE ST STE 101 SANTA BARBARA, CA 93101	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	2,500
SANTA BARBARA DAWG 5480 OVERPASS ROAD SANTA BARBARA, CA 93111	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	250
SANTA BARBARA FAMILY YMCA 36 HITCHCOCK WAY SANTA BARBARA, CA 93105	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	1,000
SANTA BARBARA HUMANE SOCIETY FOR THE PREVENTION OF CRUELTY TO ANIMALS 5399 OVERPASS RD SANTA BARBARA, CA 93111	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	250
Total 3a				407,700

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>				
SANTA BARBARA MEALS ON WHEELS INC PO BOX 60921 SANTA BARBARA, CA 93160	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	500
SANTA BARBARA RESCUE MISSION 535 E YANONALI ST SANTA BARBARA, CA 93103	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	5,000
SANTA BARBARA ZOOLOGICAL FOUNDATION 500 NINOS DRIVE SANTA BARBARA, CA 93103	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	4,600
SAVE THE WAVES COALITION PO BOX 183 3500 HIGHWAY ONE DAVENPORT, CA 95017	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	1,000
SBCC FOUNDATION 721 CLIFF DRIVE SANTA BARBARA, CA 93109	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	1,000
Total 				407,700
3a				

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SOLVANG FRIENDSHIP HOUSE 880 FRIENDSHIP LN SOLVANG, CA 93463	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	2,500
ST RAPHAEL CATHOLIC CHURCH 5444 HOLLISTER AVE SANTA BARBARA, CA 93111	NONE	PC	YOUTH MINISTRY	5,000
ST RAPHAEL SCHOOL 160 ST JOSEPH ST SANTA BARBARA, CA 93111	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	4,000
ST VINCENT'S 4200 CALLE REAL SANTA BARBARA, CA 93110	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	3,300
STAR JASMINE MUSIC FOUNDATION 126 COOPER SANTA BARBARA, CA 93109	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	5,000
Total ▶ 3a				407,700

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>				
TEDDY BEAR CANCER FOUNDATION 3892 STATE STREET STE 220 SANTA BARBARA, CA 93105	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	18,000
THE COLAB FOUNDATION PO BOX 7523 SANTA MARIA, CA 93456	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	2,500
THE DALMATIAN DREAMS FOUNDATION DBA DREAM FOUNDATION 1528 CHAPALA STREET SUITE 304 SANTA BARBARA, CA 93101	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	14,500
THE LEUKEMIA & LYMPHOMA SOCIETY 3 INTERNATIONAL DRIVE SUITE 200 RYE BROOK, NY 10573	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	1,000
THE WAHINE PROJECT PO BOX 51204 PACIFIC GROVE, CA 93950	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	14,000
Total ▶ 3a				407,700

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>				
THEATRE ROCKS INC PO BOX 26 ENNIS, TX 75120	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	500
TRANSITION HOUSE 425 E COTA ST SANTA BARBARA, CA 93101	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	500
UC REGENTS UNIVERSITY OF CALIFORNIA SANTA BARBARA SANTA BARBARA, CA 93106	NONE	PC	MEN'S WATER POLO	5,000
UNITED BOYS AND GIRLS CLUBS OF GREATER SANTA BARBARA COUNTY PO BOX 1485 1124 CASTILLO STREET SANTA BARBARA, CA 93102	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	1,000
UNITED WAY OF SANTA BARBARA COUNTY INC 320 E GUTIERREZ ST SANTA BARBARA, CA 93101	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	2,000
Total 3a				407,700

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>				
VIETNAM VETERANS OF AMERICA INC PO BOX 4862 SANTA BARBARA, CA 93140	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	10,000
VISITING NURSE AND HOSPICE CARE 509 E MONTECITO ST STE 200 SANTA BARBARA, CA 93103	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	1,000
WOMEN'S ATHLETIC PERFORMANCE FOUNDATION PO BOX 321 GOLETA, CA 93116	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	3,000
YOUNG AMERICA'S FOUNDATION 11480 COMMERCE PARK DRIVE SUITE 600 RESTON, VA 20191	NONE	PC	IN FURTHERANCE OF SECTION 501(C)(3) EXEMPT PURPOSE	30,000
Total 				407,700
3a				

TY 2016 Accounting Fees Schedule**Name:** RUDI SCHULTE FAMILY FOUNDATION**EIN:** 77-0452600

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
DAMITZ BROOKS NIGHTINGALE ET AL	10,438	5,219		5,219

TY 2016 Distribution from Corpus Election

Name: RUDI SCHULTE FAMILY FOUNDATION

EIN: 77-0452600

Election: PURSUANT TO IRC SECTION 4942(H)(2) AND REGULATION 53.4942(A)-3(D)(2), THE FOUNDATION HEREBY ELECTS TO TREAT CURRENT YEAR QUALIFYING DISTRIBUTIONS IN EXCESS OF THE IMMEDIATELY PRECEDING TAX YEAR'S UNDISTRIBUTED INCOME AS BEING MADE OUT OF
CORPUS.SIGNED:_____ PAUL S.
SCHULTE PRESIDENT

TY 2016 General Explanation Attachment**Name:** RUDI SCHULTE FAMILY FOUNDATION**EIN:** 77-0452600**General Explanation Attachment**

Identifier	Return Reference	Explanation	
1		FORM 990-PF, PART VII-B, LINE 1A(4)	THE FOUNDATION UTILIZES THE SERVICES OF DEFINE FINANCIAL OF WHICH MR. TAYLOR SCHULTE IS FOUNDER AND CHIEF EXECUTIVE OFFICER, MR SCHULTE IS THE SON OF PAUL S SCHULTE, THE PRESIDENT OF THE FOUNDATION FOR THESE SERVICES THE FOUNDATION PAYS THE USUAL AND CUSTOMARY FEES AS BILLED TO IT BY THIS ENTITY

TY 2016 Investments Corporate Stock Schedule**Name:** RUDI SCHULTE FAMILY FOUNDATION**EIN:** 77-0452600

Name of Stock	End of Year Book Value	End of Year Fair Market Value
FIDELITY #119 - COMMON STOCK	1,424,745	1,947,277

TY 2016 Investments - Other Schedule**Name:** RUDI SCHULTE FAMILY FOUNDATION**EIN:** 77-0452600

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
MUTUAL FUNDS	AT COST	6,616,789	6,529,202
PARTNERSHIP INVESTMENT - THE PINES RESORT	FMV	996,899	996,899

TY 2016 Legal Fees Schedule**Name:** RUDI SCHULTE FAMILY FOUNDATION**EIN:** 77-0452600

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
SCHLEY LOOK & GUTHRIE	300	150		150

TY 2016 Other Assets Schedule

Name: RUDI SCHULTE FAMILY FOUNDATION

EIN: 77-0452600

Other Assets Schedule

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
OTHER		146	146

TY 2016 Other Expenses Schedule**Name:** RUDI SCHULTE FAMILY FOUNDATION**EIN:** 77-0452600**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INSURANCE-D&O	1,839	920		919
FILING FEES	85	0		85
PARTNERSHIP PASSTHRU LOSS	656	656		0

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

**TY 2016 Other
Notes/Loans Receivable
Long Schedule**

Name: RUDI SCHULTE FAMILY FOUNDATION
EIN: 77-0452600

Borrower's Name	Relationship to Insider	Original Amount of Loan	Balance Due	Date of Note	Maturity Date	Repayment Terms	Interest Rate	Security Provided by Borrower	Purpose of Loan	Description of Lender Consideration	Consideration FMV
RUDI SCHULTE RESEARCH INSTITUTE	HEIR OF RUDI SCHULTE	941	0	2009-12	2010-12	IMMEDIATELY	0 %	NONE	GENERAL	INHERITED PROPERTY EXPENSE	0
VIP FUTURES LP - ORANGE GARDEN	NONE	2,037,000	0	1991-03	2029-03	PAYABLE MONTHLY	716 00000000000 %	NONE	GENERAL	BEQUEST	0
VIP FUTURES LP - WESTERN GRDN	NONE	1,091,000	0	1991-03	2029-03	PAYABLE MONTHLY	716 00000000000 %	NONE	GENERAL	BEQUEST	0

TY 2016 Other Professional Fees Schedule**Name:** RUDI SCHULTE FAMILY FOUNDATION**EIN:** 77-0452600

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	61,283	61,283		0

TY 2016 Taxes Schedule**Name:** RUDI SCHULTE FAMILY FOUNDATION**EIN:** 77-0452600

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL EXCISE TAX	3,500	0		0
FOREIGN TAXES PAID	3,550	3,550		0