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Return of Private Foundation

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

OMB No 1545-0052

2016

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

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

Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

For calendar year 2016 or tax year beginning

MAY 20, 2016

, and ending

DEC 31, 2016

Name of foundation
**ALFRED H. LANDER AND JANET L. LANDER
FAMILY CHARITABLE FOUNDATION**

Number and street (or P.O. box number if mail is not delivered to street address) Room/suite
652 SCHUPP DRIVE

City or town, state or province, country, and ZIP or foreign postal code
LUCINDA, PA 16235

G Check all that apply: ☒ Initial return ☐ Initial return of a former public charity
☐ Final return ☐ Amended return
☐ Address change ☐ Name change

H Check type of organization: ☒ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col (c), line 16)
\$ 4235687. (Part I, column (d) must be on cash basis.)

J Accounting method: ☒ Cash ☐ Accrual
☐ Other (specify) _____

A Employer identification number
81-1408174

B Telephone number
(814) 226-6853

C If exemption application is pending, check here ☐

D 1. Foreign organizations, check here ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ☐

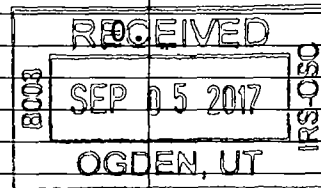
E If private foundation status was terminated under section 507(b)(1)(A), check here ☐

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).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1	Contributions, gifts, grants, etc., received	4360461.			
2	Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
3	Interest on savings and temporary cash investments				
4	Dividends and interest from securities	55887.	55831.		STATEMENT 1
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	18548.			
b	Gross sales price for all assets on line 6a	3111617.			
7	Capital gain net income (from Part IV, line 2)		18548.		
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)				
11	Other income				
12	Total. Add lines 1 through 11	4434896.	74379.	0.	
13	Compensation of officers, directors, trustees, etc	0.	0.	0.	0.
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees STMT 2	30304.	0.	0.	30304.
b	Accounting fees				
c	Other professional fees STMT 3	26420.	11286.	0.	15134.
17	Interest				
18	Taxes STMT 4	2012.	1752.	0.	0.
19	Depreciation and depletion				
20	Occupancy				
21	Travel, conferences, and meetings	1923.	0.	0.	1923.
22	Printing and publications				
23	Other expenses STMT 5	850.	0.	0.	850.
24	Total operating and administrative expenses. Add lines 13 through 23	61509.	13038.	0.	48211.
25	Contributions, gifts, grants paid	168899.			168899.
26	Total expenses and disbursements. Add lines 24 and 25	230408.	13038.	0.	217110.
27	Subtract line 26 from line 12:				
a	Excess of revenue over expenses and disbursements	4204488.			
b	Net investment income (if negative, enter -0-)		61341.		
c	Adjusted net income (if negative, enter -0-)			0.	

SEP 06 2017 Revenue

Operating and Administrative Expenses



**ALFRED H. LANDER AND JANET L. LANDER
FAMILY CHARITABLE FOUNDATION**

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		
		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing		179260.	179260.
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock			
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment basis ▶			
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other	STMT 7	0.	4027341.	4056427.
14 Land, buildings, and equipment: basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item i)		0.	4206601.	4235687.
Liabilities	17 Accounts payable and accrued expenses		2230.	
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)		0.	2230.
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	0.	4204371.	
	30 Total net assets or fund balances	0.	4204371.	
	31 Total liabilities and net assets/fund balances	0.	4206601.	

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	0.
2 Enter amount from Part I, line 27a	2	4204488.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	4204488.
5 Decreases not included in line 2 (itemize) ▶	5	117.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	4204371.

SEE STATEMENT 6

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**ALFRED H. LANDER AND JANET L. LANDER
FAMILY CHARITABLE FOUNDATION**
Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a BNY MELLON, N.A. - SEE ATTACHED STATEMENT		D	VARIOUS	12/31/16
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 3111617.		3093069.	18548.
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) 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			18548.
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	18548.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8		3	0.

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☒ Yes ☐ No

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

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

(a) Base period years 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			
2014			
2013			
2012			
2011			

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

2	
3	
4	
5	
6	
7	
8	

ALFRED H. LANDER AND JANET L. LANDER

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FAMILY CHARITABLE FOUNDATION

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		1	1227.
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	1227.
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	1227.
6 Credits/Payments:			
a 2016 estimated tax payments and 2015 overpayment credited to 2016	6a	260.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c	1000.	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	1260.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	33.	
11 Enter the amount of line 10 to be: Credited to 2017 estimated tax <input type="checkbox"/> 0. Refunded <input type="checkbox"/>	11	33.	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (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? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
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?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <u>PA</u>		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? If "Yes," complete Part XIV	X	
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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ALFRED H. LANDER AND JANET L. LANDER
FAMILY CHARITABLE FOUNDATION
Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11	X
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	X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>N/A</u>	13	X
14 The books are in care of ► <u>THE FOUNDATION</u> Telephone no. ► <u>(814) 226-6853</u> Located at ► <u>652 SCHUPP DRIVE, LUCINDA, PA</u> ZIP+4 ► <u>16235</u>		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year ► 15 <u>N/A</u>		
16 At any time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►	16	X

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here ► <input type="checkbox"/>	1b	X
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	X
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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ► _____ 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.) <u>N/A</u> c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► _____	2b	
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No b If "Yes," did it have excess business holdings in 2016 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2016) <u>N/A</u>	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2016?	4b	X

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

5a During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions)

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

If "Yes" to 6b, file Form 8870

X

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 8		0.	0.	0.

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

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

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

0

Form 990-PF (2016)

0

0.

ALFRED H. LANDER AND JANET L. LANDER
FAMILY CHARITABLE FOUNDATION
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	3078159.
b	Average of monthly cash balances	1b	1241579.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	4319738.
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	4319738.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	64796.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	4254942.
6	Minimum investment return. Enter 5% of line 5 ADJUSTED FOR SHORT TAX PERIOD	6	130787.

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

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	217110.
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	217110.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	217110.

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)

N/A

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

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

1 a 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 foundation is a private operating foundation described in section

☒ 4942(j)(3) or ☐ 4942(j)(5)

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

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

Tax year	Prior 3 years			(e) Total
(a) 2016	(b) 2015	(c) 2014	(d) 2013	
0.	0.	0.	0.	0.
0.	0.	0.	0.	0.
217110.	0.	0.	0.	217110.
0.	0.	0.	0.	0.
217110.	0.	0.	0.	217110.
4220262.				4220262.
				0.
				0.
				0.
				0.
				0.
				0.

Part XV Supplementary Information (Complete this part only if the foundation 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).)

NONE

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.

NONE

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:

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:

ALFRED H. LANDER AND JANET L. LANDER

Form 990-PF (2016)

FAMILY CHARITABLE FOUNDATION

81-1408174 Page 11

Part XV Supplementary Information (continued)

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 Paid during the year				
YOUTH PROGRAMS AND SERVICES - CLARION COUNTY YMCA 15292 ROUTE 322, SUITE 1 CLARION, PA 16214	NONE	I	YOUTH PROGRAMS AND SERVICES	2500.
RAIL 66 COUNTRY TRAIL 1040 LANDER TRAIL LUCINDA, PA 16235	NONE	NC	DIRECT ADVERTISING COSTS	200.
WINDOWS AT ST. JOSEPH CHURCH 112 RECTORY LANE LUCINDA, PA 16235	NONE	NC	WINDOW FUND	300.
NEEDY STUDENTS AT ST. JOSEPH CATHOLIC SCHOOL 72 RECTORY LANE LUCINDA, PA 16235	NONE	I	SCHOOL SUPPLIES	3449.
NATIONAL MS SOCIETY - BIKE MS P.O. BOX 4527 NEW YORK, NY 10163	NONE	NC	ADVERTISING	150.
Total	SEE CONTINUATION SHEET(S)			168899.
b Approved for future payment				
NONE				
Total				0.

Form 990-PF (2016)

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount		
1 Program service revenue:						
a _____						
b _____						
c _____						
d _____						
e _____						
f _____						
g Fees and contracts from government agencies						
2 Membership dues and assessments						
3 Interest on savings and temporary cash investments						
4 Dividends and interest from securities			14	55887.		
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	18548.		
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.		74435.		0.
13 Total. Add line 12, columns (b), (d), and (e)						
(See worksheet in line 13 instructions to verify calculations.)						

[illegible]

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

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

[illegible]

- 2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No
- b If "Yes," complete the following schedule.

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

Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.					May the IRS discuss this return with the preparer shown below (see instr.)? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
	Signature of officer or trustee <i>Edward H. Mord...</i>		Date <i>8-25-2017</i>		Title <i>Pres</i>		
Paid Preparer Use Only	Print/Type preparer's name EDWARD WOJNAROSKI		Preparer's signature <i>Edward Mord...</i>		Date <i>8/30/17</i>	Check <input type="checkbox"/> if self-employed	PTIN P01452338
	Firm's name ▶ WILLIAMS COULSON					Firm's EIN ▶ 25-1771198	
	Firm's address ▶ 420 FORT DUQUESNE BLVD., 16TH FLOOR PITTSBURGH, PA 15222					Phone no. 412 454-0200	

Schedule B

(Form 990, 990-EZ, or 990-PF)

Department of the Treasury
Internal Revenue Service**Schedule of Contributors**

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.
▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and
its instructions is at www.irs.gov/form990.

OMB No 1545-0047

2016

Name of the organization

ALFRED H. LANDER AND JANET L. LANDER
FAMILY CHARITABLE FOUNDATION

Employer identification number

81-1408174

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)() (enter number) organization☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation☐ 501(c)(3) taxable private foundationCheck if your organization is covered by the **General Rule** or a **Special Rule**.**Note:** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.**General Rule**

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. ▶ \$ _____

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

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

Name of organization

ALFRED H. LANDER AND JANET L. LANDER
FAMILY CHARITABLE FOUNDATION

Employer identification number

81-1408174

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	ALFRED & JANET LANDER 1390 EAST MAIN STREET, SUITE 2 CLARION, PA 16214	\$ 4360461.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization

ALFRED H. LANDER AND JANET L. LANDER
FAMILY CHARITABLE FOUNDATION

Employer identification number

81-1408174

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

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	

Name of organization

Employer identification number

**ALFRED H. LANDER AND JANET L. LANDER
FAMILY CHARITABLE FOUNDATION**
81-1408174**Part III**

Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year (Enter this info once) ▶ \$

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

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

**ALFRED H. LANDER AND JANET L. LANDER
FAMILY CHARITABLE FOUNDATION**

81-1408174

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
WASHINGTON TOWNSHIP VFD 19877 ROUTE 208 FRYBURG, PA 16326	NONE	NC	FIRE EQUIPMENT	200.
ADVERTISING/DIGITAL TIMING CHIPS - UNITED WAY OF CLARION COUNTY P.O. BOX 207 CLARION, PA 16214	NONE	I	ADVERTISING/DIGITAL TIMING CHIPS	8572.
CARE TO CHILDREN AT SHRINERS HOSPITAL FOR CHILDREN IN HONOLULU 1310 PUNAHOU STREET HONOLULU, HI 96826-1099	NONE	I	CARE FOR CHILDREN	30000.
NEEDY STUDENTS OF HOLY ROSARY ACADEMY 7120 KELLY ST. PITTSBURGH, PA 15208	NONE	I	NEEDY STUDENTS	20.
HOME HEALTH CARE & HOSPICE SERVICES - CLARION FOREST VNA FOUNDATION 271 PERKINS ROAD CLARION, PA 16214	NONE	I	HOME HEALTH CARE & HOSPICE SERVICES	5000.
NEEDY STUDENTS - VENANGO CATHOLIC HIGH SCHOOL 1505 WEST FIRST ST. OIL CITY, PA 16301	NONE	I	NEEDY STUDENTS	2000.
BUILDING & IMPROVEMENTS AT ST. JOSEPH CHURCH 112 RECTORY LANE LUCINDA, PA 16235	NONE	I	CHURCH IMPROVEMENTS	6710.
PARKINSON FOUNDATION OF THE NATIONAL CAPITAL AREA 8830 CAMERON STREET #201 SILVER SPRING, MD 20910	NONE	PF	GENERAL OPERATING	50.
NEEDY STUDENTS - IMMACULATE CONCEPTION HIGH SCHOOL 729 EAST MAIN STREET CLARION, PA 16214	NONE	I	NEEDY STUDENTS	50.
CLARION AREA STUDENT SCHOLARSHIPS - CLARION UNIVERSITY 909 EAST WOOD ST. CLARION, PA 16214	NONE	I	CLARION AREA STUDENT SCHOLARSHIPS	31410.
Total from continuation sheets				162300.

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3 Grants and Contributions Paid During the Year (Continuation)**Total from continuation sheets**

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES				STATEMENT 1
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME
BNY MELLON, N.A.	55887.	0.	55887.	55831.	0.
TO PART I, LINE 4	55887.	0.	55887.	55831.	0.

FORM 990-PF	LEGAL FEES				STATEMENT 2
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
LEGAL FEES - RELATING TO ESTABLISHMENT OF CHARITABLE FOUNDATION	30304.	0.	0.	30304.	
TO FM 990-PF, PG 1, LN 16A	30304.	0.	0.	30304.	

FORM 990-PF	OTHER PROFESSIONAL FEES				STATEMENT 3
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
BNY MELLON, N.A. INVESTMENT MANAGEMENT FEES	18810.	11286.	0.	7524.	
APPRAISAL FEES - PROPERTY CONTRIBUTED TO FOUNDATION	7610.	0.	0.	7610.	
TO FORM 990-PF, PG 1, LN 16C	26420.	11286.	0.	15134.	

FORM 990-PF	TAXES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FOREIGN TAX WITHHELD	1752.	1752.	0.	0.	
ESTIMATED EXCISE TAX PAYMENTS	260.	0.	0.	0.	
TO FORM 990-PF, PG 1, LN 18	2012.	1752.	0.	0.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
IRS APPLICATION FOR RECOGNITION OF EXEMPTION 501(C)(3) - USER FEE	850.	0.	0.	850.	
TO FORM 990-PF, PG 1, LN 23	850.	0.	0.	850.	

FORM 990-PF	OTHER DECREASES IN NET ASSETS OR FUND BALANCES			STATEMENT	6
DESCRIPTION	AMOUNT				
SALES COST ADJUSTMENT - MICROCHIP TECHNOLOGY INC - CUSIP 595014104	25.				
COST ADJUSTMENT	92.				
TOTAL TO FORM 990-PF, PART III, LINE 5	117.				

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	7
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
BNY MELLON - SEE STATEMENT ATTACHED	COST	4027341.	4056427.
TOTAL TO FORM 990-PF, PART II, LINE 13		4027341.	4056427.

FORM 990-PF	PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS	STATEMENT	8
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NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
ALFRED H. LANDER 652 SCHUPP DRIVE LUCINDA, PA 16235	PRESIDENT & DIRECTOR 10.00	0.	0.	0.
JANET L. LANDER 652 SCHUPP DRIVE LUCINDA, PA 16235	VICE PRESIDENT & DIRECTOR 10.00	0.	0.	0.
KATHERINE M. GUHIN 652 SCHUPP DRIVE LUCINDA, PA 16235	DIRECTOR 2.00	0.	0.	0.
MARGARET L. DAVIDSON 652 SCHUPP DRIVE LUCINDA, PA 16235	DIRECTOR 2.00	0.	0.	0.
SARAH A. LANDER 652 SCHUPP DRIVE LUCINDA, PA 16235	DIRECTOR 2.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		0.	0.	0.

Part II, Line 13 (990-PF) - Investments - Other

Asset Description		Basis of Valuation	Book Value Beg. of Year	Book Value End of Year	FMV End of Year
1			0	4,027,341	4,056,427
2	INVESCO LTD		0	3,921	3,944
3	JOHNSON CTS INTL PLC		0	3,902	3,708
4	NABORS INDUSTRIES LTD COM		0	3,149	4,756
5	ALLIED WORLD ASSURANCE COMPANY		0	4,134	5,908
6	BROADCOM LTD		0	6,878	7,425
7	AT&T INC		0	7,158	7,655
8	ABBOTT LABORATORIES		0	4,061	3,457
9	DREYFUS GLOBAL REAL RET -Y		0	250,000	236,404
10	ADVANTAGE DYN TOTAL RET -Y		0	175,328	175,660
11	DREYFUS STRATEGIC VALUE F-Y		0	254,059	283,497
12	AGILENT TECHNOLOGIES INC		0	4,154	4,100
13	ALTRIA GROUP INC		0	7,866	8,114
14	AMERICAN TOWER CORP PFD		0	5,077	4,927
15	AMERICAN TOWER CORP CONV PFD		0	4,832	4,703
16	ANADARKO PETROLEUM CORP CONV PF		0	6,717	7,030
17	APPLE COMPUTER INC COM		0	7,395	8,223
18	ARES CAP CORP		0	7,021	7,915
19	AUTOMATIC DATA PROCESSING INC CON		0	3,488	4,111
20	BNY MELLON CORP BOND-M		0	150,000	148,137
21	BNY MELLON INTL EQUITY INCOME FUND		0	150,000	149,146
22	ALLERGAN PLC		0	2,915	3,150
23	EATON CORP PLC		0	7,505	8,051
24	BNY MELLON MID CAP STK FD CL M		0	404,284	421,987
25	BNY MELLON INTERMEDIATE BOND FD C		0	150,000	147,402
26	BNY MELLON BOND FD CL M		0	320,731	310,401
27	BRISTOL MYERS SQUIBB CO COM		0	8,062	6,428
28	CME GROUP INC		0	3,818	4,614
29	CSX CORP COM		0	5,856	7,186
30	CHEVRONTXACO CORP		0	3,997	4,590
31	COMCAST CORP NEW CL A		0	6,279	6,905
32	CONOCOPHILLIPS		0	4,212	4,514
33	CORNING INC COM		0	3,967	4,611
34	DISNEY (WALT) COMPANY HOLDING CO		0	6,894	7,295
35	DOMINION RESOURCES INC CONV PFD		0	6,196	6,008
36	DOW CHEMICAL COMPANY COMMON		0	7,978	8,583
37	DREYFUS GLOBAL EMRG MKTS-Y		0	160,000	144,055
38	DREYFUS SELECT MGR L/S EQ-Y		0	150,000	151,358
39	DREYFUS FLOATING RATE INC-Y		0	25,000	25,421
40	DREYFUS BASIC S&P 500 STK I		0	252,653	258,303
41	DREYFUS PREM LT TRM HI YLD-R		0	100,000	102,303
42	DREYFUS GLOBAL REAL ES SEC-Y		0	65,630	60,300
43	DREYFUS GROWTH & VALUE FDS INC		0	75,343	83,710
44	DREYFUS INTL SMALL CAP-Y		0	125,000	129,224
45	DREYFUS/NEWTON INTERN EQTY-Y		0	120,000	114,848
46	DUPONT FABROS TECHNOLOGY INC		0	3,371	3,514

Part II, Line 13 (990-PF) - Investments - Other

	Asset Description	Basis of Valuation	Book Value Beg. of Year	Book Value End of Year	FMV End of Year
47	EXELON CORP CONV PFD		0	6,224	6,293
48	GALLAGHER ARTHUR J & CO		0	7,194	7,794
49	GENERAL ELECTRIC CO		0	9,651	10,112
50	HALLIBURTON COMPANY COM		0	4,113	4,868
51	HESS CORP PFD		0	6,993	6,629
52	INTEL CORPORATION		0	8,828	9,430
53	ISHARES MSCI EAFE INDEX FD		0	220,132	219,374
54	JOHNSON & JOHNSON COM		0	4,889	4,839
55	KLA TENGOR CORP		0	2,780	3,147
56	KOHL'S CORP		0	2,245	2,963
57	ELI LILLY & CO COM		0	6,784	6,620
58	LOCKHEED MARTIN CORP		0	9,143	9,498
59	LOWES COMPANIES INC COM		0	5,493	4,978
60	MARATHON PETROLEUM CORP		0	4,008	5,538
61	MATTEL INC		0	3,865	3,582
62	MICROSOFT CORP COM		0	3,116	3,728
63	MONDELEZ INTERNATIONAL INC		0	4,560	4,433
64	ASG MANAGED FUTURES STRAT-Y		0	175,000	158,548
65	NAVIENT CORP W/D		0	4,480	5,586
66	NEW RESIDENTIAL INVESTMENT		0	7,180	8,174
67	NUCOR CORP		0	3,534	4,166
68	PPG INDUSTRIES INC		0	6,367	5,496
69	PACWEST BANCORP DEL		0	3,936	4,900
70	PEPSICO INC		0	7,125	7,219
71	PFIZER INC COM		0	7,797	7,146
72	PHILIP MORRIS INTERNATIONAL		0	9,421	8,509
73	PLAINS GP HOLDINGS LP		0	4,835	5,722
74	PROCTER & GAMBLE CO COM		0	8,476	8,408
75	QUALCOMM INC		0	6,452	6,520
76	SEMPRA ENERGY		0	3,829	3,522
77	SOUTHWESTERN ENERGY CO CONV PFD		0	2,657	2,292
78	STANLEY BLACK & DECKER INC		0	4,627	5,390
79	STARWOOD PROPERTY TRUST INC		0	8,158	8,560
80	DREYFUS SELECT MGR S/C GR-Y		0	70,000	72,482
81	DREYFUS INTENATION STOCK-Y		0	65,000	63,701
82	DREYFUS US EQUITY FUND-Y		0	107,747	101,923
83	DREYFUS SELECT MGR S/C VL-Y		0	70,000	80,903
84	TAIWAN SEMICONDUCTOR ADR		0	3,826	4,312
85	TEXAS INSTRUMENTS INC		0	4,321	5,108
86	TIME WARNER INC.		0	9,720	12,549
87	UNITED HEALTH GROUP INC		0	3,864	4,641
88	VALERO ENERGY CORP NEW		0	5,885	7,515
89	VERIZON COMMUNICATIONS INC		0	3,610	3,737
90	WAL MART STORES INC		0	4,427	4,147
91	WELLS FARGO & CO NEW		0	6,750	7,715
92	WESTERN DIGITAL CORP		0	3,539	4,077

Part II, Line 13 (990-PF) - Investments - Other

		0		4,027,341		4,056,427	
		Book Value		Book Value		FMV	
		Beg of Year		End of Year		End of Year	
Asset Description		Basis of Valuation					
93	MC DONALDS CORPORATION COMMON				8,450		8,399
94	MERCK & CO INC				7,481		7,653

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Part IV (990-PF) - Capital Gains and Losses for Tax on Investment Income

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