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

OMB No 1545-0052 2016

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.

Internal	Revenue Service	' l	► Informa	tion about F	orm 990	PF and its se	parate i	nstruction	ıs ıs at www	.irs.	gov/form990pf.	Ope	n to Public Inspection
For ca	lendar year 2	2016 or ta	ax year begir	nning			, 2016	, and en	ding		,		
401	George and Lucy Malmberg Foundat 401 S Palm Avenue Sarasota, Fl 34236									В	Employer identification 81-6941753 Telephone number (se (610) -941-	e instri 247	uctions)
			<u></u>		<u> </u>					С	If exemption applicati	on is f	pending, check here 🕨 🗌
G Ch	Final return Address change			_	al return of ended retu		ner publ	ic charity	D	1 Foreign organizations	, checl	k here -	
u Ch				_	ne change				-	2 Foreign organizations here and attach comp			
H Ch	′'	•	nonexempt			Other ta				Ε	If private foundation s		
	r market value o			J Ac	_	ng method specify)	ΧC	ash	Accrual]_		o)(1)(A), check here.	
<u> </u>	<u> </u>		•			nn (d) mus	t be or	cash b	asis)	F	If the foundation is in under section 507(b)(
Part	Expens columns	i es (The (b), (c), a ual the ar	total of amou and (d) may mounts in co)	nts in not neces	l expé	Revenue a enses per b			t investme income	nt	(c) Adjusted nei	i	(d) Disbursements for charitable purposes (cash basis only)
	1 Contribute 2 Check >		s, etc., received (attac		В	5,000,	000.						
	Check If the foundation is not required to attach Sch Interest on savings and temporary cash investments.							,					
3 a 2	1	and interest fro	om securities									二	
7	5 a Gross re b Net rent or (loss)	al income										\dashv	
T 6	6 a Net gain o		ale of assets not on li	ne 10			1	1			ci		
™	assets o	n line 6a	ome (from Part I	/ line 3)	- 		10-1		~ 1 A 2N	47	1		
AUG	8 Net sho	rt term capit	tal gain	v, iiile 2)			123	J.A		111	1001	\exists	
F. J. E.	10 a Gross s	modification aleș less	ns 				1		1000	1)	-	\dashv	
	returns allowand	ces		-	 			C'	<u> 12:23 -</u>		And the same of th	\dashv	
2	goods s		ach schedule)		 								
DENNAME	11 Other in	come (attac	h schedule)										
@&)	12 Total		-			5,000,	000.			0.		0.	
			ficers, directors, t laries and wages		ļ		0.					\dashv	-
			loyee benefits	•	 							\dashv	
A D	16a Legal fe												
M	-	ing fees (att essional fees (a	*					<u> </u>			-	 ∤	
o N	17 Interest	essiuliai 1665 (1	allach sch)		-							\dashv	
O I P S E T R R		ach schedule)(s	see instrs)									\dashv	
R R A A T T		ation (attach e) and deple				-					-		
I I N V G E	20 Occupa	•								·		\rightrightarrows	
A F		conterences and publica	, and meetings itions			· · ·- ·						\dashv	
N X D P	-	openses (att	ach schedule)									_	
N S E			d administrative s 13 through 23				_		-				
3	1 .	ons, gifts, grant	_							_			
		penses and s 24 and 25	disbursements				0.		-	0.		0.	0.
		t line 26 from	n line 12 ¹ over expenses										
		bursements				5,000,	000.						
			ome (if negative,		<u> </u>					0.		_	
	C Adjuste	u net incom	ne (if negative, er	iter •0•)							<u> </u>	0.	

rorm	990-	rr (2010) George	and Lucy Maimberg Foundati			941/53	Page 2
Par	t 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	(b) Book Value	of year	Market Value
	1	Cash - non-interest		(4,500,100,00	(-)	(-) (
	2		ary cash investments		5,000,000	- -	
		Accounts receivable	_	 	3,000,000	<u> </u>	
	1	Less allowance for					
	4	Pledges receivable		 			
		Less allowance for	doubtful accounts				
	5	Grants receivable					
	6	Receivables due from offic	cers, directors, trustees, and other ch schedule) (see instructions)			-	
	7	Other notes and loans rec	, ,				
Α	'	Less allowance for	`	·			
A S E T		Inventories for sale					
E	8						
Ţ	9	Prepaid expenses a					
S		obligations (attach s	•				
		Investments — corporate	, ,	ļ <u>-</u>			
		: Investments — corporate	,				
	11	Investments – land, equipment basis	•				
		Less accumulated deprec (attach schedule)	•				-
	12	Investments – morte	gage loans				
	13	Investments - other	r (attach schedule)				
ļ	14	Land, buildings, and	l equipment basis ►				
		Less accumulated deprec (attach schedule)	elation •				
		Other assets (descri	•				
	16	Total assets (to be a	completed by all filers — Also, see page 1, item ()	0.	5,000,000	, }	0.
<u> </u>	17		nd accrued expenses	0.	3,000,000	' 	
ĩ	18		nd decided experises			-	
A B	19	Deferred revenue				\dashv	
ı	1		tore trustage O ather discussified access			_	
L	20		tors, trustees, & other disqualified persons s payable (attach schedule)			-	I
÷	21	• •				_	
Ī	22	Other liabilities (des				-	
E S	23		lines 17 through 22)	0.		<u>).</u>	
		Foundations that fo and complete lines	llow SFAS 117, check here 24 through 26 and lines 30 and 31.				
NF	24	Unrestricted			5,000,000).	
E U	25	Temporarily restricted	ed			_1	
D	26	Permanently restrict	ed				
A B S A L T S N		Foundations that do and complete lines	o not follow SFAS 117, check here. Capacital Property of the				
ĔĹ	27	Capital stock, trust i	orincipal, or current funds			1	
TA	28	•	, or land, bldg , and equipment fund.			-	
С	29	· ·	ulated income, endowment, or other funds		· · · · · ·	\dashv	
O E R S	30		fund balances (see instructions)	0.	5,000,000	$\overline{}$	
•	31		net assets/fund balances		3,000,000	' '	
		(see instructions)		0.	5,000,000	<u>). </u>	·
Par	t III	Analysis of Chan	ges in Net Assets or Fund Balanc	<u>es</u>			
1	Total end-	I net assets or fund b of-year figure reporte	alances at beginning of year – Part II, colu d on prior year's return)	umn (a), line 30 (must a		ı	0.
2	Ente	r amount from Part I,	line 27a		. 7	2 5,	000,000.
3	Other	increases not included in la	ne 2 (itemize)		<u> </u>	3	
4	Add	lines 1, 2, and 3			· 	4 5,	000,000.
5	Decrea	ases not included in line 2	(itemize)		:	5	
6	Total	I net assets or fund b	alances at end of year (line 4 minus line 5)	- Part II column (b) I	ine 30	5 5	000 000

rar	(a) List and describe	the kind(s) of property sold (e.g., ouse, or common stock, 200 shares	real estate,	(b) How acquired P — Purchase D — Donation	(c) Date acquired (mo , day yr)	(d) Date sold (mo , day, yr)
1 a	N/A			D — Donation		
ь			·			-
е				<u> </u>	l	
	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other ba plus expense of sa		(h) Gain or (e) plus (f) m	
a						
<u>b</u>	<u> </u>					
d	···					
		ung gain in column (h) and owned	by the foundation on 12/31	169	412.0 (0.1	415
	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 (i) F M V as of 12/31/69 (j) Adjusted basis (k) Excess of col. (i) over col (j), if any		g	(1) Gains (Col ain minus col (k), b an -O-) or Losses (fr	ut not less	
a	· · · · · · · · · · · · · · · · · · ·					
b						
C						
d						
е						
2	Capital gain net income or (ne		enter in Part I, line 7 ter -0- in Part I, line 7	_ 2		
3	Net short-term capital gain or	(loss) as defined in sections 1222(5	i) and (6).			
	If gain, also enter in Part I, line in Part I, line 8	e 8, column (c) (see instructions). I	f (loss), enter -0-	3		
Par	CV Qualification Under	r Section 4940(e) for Reduce	ed Tax on Net Investn	nent Income		-
Was	s,' the foundation does not qua	this part blank. ction 4942 tax on the distributable a slify under section 4940(e). Do not of each column for each year, see the in	complete this part.		Yes	□ No
	(a)	(b)	(c)		(d)	
	Base period years Calendar year (or tax year beginning in)	Adjusted qualifying distributions	Net value of noncharitable-use as	sets	Distribution (col. (b) divided	
	2015					
	2014					
	2013					
	2012					
	2011				1	
2	Total of line 1, column (d)			2		
3	Average distribution ratio for the number of years the foundation	ne 5-year base period — divide the n has been in existence if less than	total on line 2 by 5, or by to 5 years	the 3		
4	Enter the net value of nonchar	ntable-use assets for 2016 from Pa	rt X, line 5	4		
5	Multiply line 4 by line 3.			5		
6	Enter 1% of net investment in	come (1% of Part I, line 27b)		6		··
7	Add lines 5 and 6			_	1	
	rida iiries s arid s			7		
8	Enter qualifying distributions fr	rom Part XII, line 4 in line 7, check the box in Part VI, lini		8		

	990-PF (2016) George and Lucy Malmberg Foundation				9417			Page 4
Par	t VI Excise Tax Based on Investment Income (Section 4940(a), 49-	40(b),	4940(e), or 4948 -	see	instruct	tions)		
` 1 a	Exempt operating foundations described in section 4940(d)(2), check here	N/A' on	line 1.	Ţ	_]
	Date of ruling or determination letter (attach copy of letter if necessary -	- see i	nstructions)		- 1			
b	Domestic foundations that meet the section 4940(e) requirements in Part V,			۱ - ا	1			0.
	check here. ► and enter 1% of Part I, line 27b		-					
С	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, I	lıne 12,	col (b)	ł	-			1
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable							_
_	foundations only Others enter -0-)				2			<u> 0 </u>
3	Add lines 1 and 2				3			0.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundation		lly Others enter -0	' ⁻⁾	5			0.
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, ent	er -u-		ŀ	3			0.
6	Credits/Payments 2016 estimated tax pmts and 2015 overpayment credited to 2016	6 a]				
	Exempt foreign organizations — tax withheld at source	6 b						
	Tax paid with application for extension of time to file (Form 8868).	6 c						1
	Backup withholding erroneously withheld	6 d						
	Total credits and payments. Add lines 6a through 6d				7			<u></u>
8	Enter any penalty for underpayment of estimated tax. Check here I if Form 2.	220 is	attached	ŀ	8			<u>-</u> -
9	Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed			•	9			0.
10	Overpayment, If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			•	10			-
11	Enter the amount of line 10 to be Credited to 2017 estimated tax		Refunded	-	11			
Par	t VII-A Statements Regarding Activities			*				
	During the tax year, did the foundation attempt to influence any national, state, or	or loca	l legistation or did	ıt			Yes	No
	participate or intervene in any political campaign?		g			1 a		<u> </u>
ь	Did it spend more than \$100 during the year (either directly or indirectly) for politicate instructions for the definition)?	tical p	urposes			1 1 1		X
	If the answer is 'Yes' to 1a or 1b , attach a detailed description of the activities and copies	of any	, matariale nubliched	,				† ^ `
	or distributed by the foundation in connection with the activities	oi aii	materiais published	'			ļ	
	Did the foundation file Form 1120-POL for this year? Enter the amount (if any) of tax on political expenditures (section 4955) imposed	4 durin	a the year			10		X
a	(1) On the foundation \Rightarrow \$ 0. (2) On foundation mar					0.		
е	Enter the reimbursement (if any) paid by the foundation during the year for political exp					<u> </u>		
	foundation managers •\$0.						ļ	_
2	Has the foundation engaged in any activities that have not previously been report	rted to	the IRS?			2		<u> </u>
	If 'Yes,' attach a detailed description of the activities					ļ		
3	Has the foundation made any changes, not previously reported to the IRS, in its govern	ning in	strument, articles				ļ	
_	of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a confo			es		3	1-	X
	Did the foundation have unrelated business gross income of \$1,000 or more duri	ing the	e year?			41		X
	If 'Yes,' has it filed a tax return on Form 990-T for this year?					5	וין וי	N/A
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):	satisfi	ed either					
Ü	By language in the governing instrument, or	5005	cu chine					
				14				
	 By state legislation that effectively amends the governing instrument so that no manimum the state law remain in the governing instrument? 	datory	directions that conf	lict		6	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			7	X	
8 a	Enter the states to which the foundation reports or with which it is registered (se	e inst	ructions)	-				
	DE							
t	If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney Ger (or designate) of each state as required by General Instruction G? If 'No,' attach explanation	neral				81	X	
9		anına	of section 4942(i)	(3) or	4942(1)	(5)		
9	Is the foundation claiming status as a private operating foundation within the me for calendar year 2016 or the taxable year beginning in 2016 (see instructions for	r Part	XIV)? If 'Yes,' con	mplet	e Pari 🕽	iii 9		X
10	Did any persons become substantial contributors during the tax year? If 'Yes,' attach a	sched	dule_listing_their nan	nes	_			
	and addresses.		See State	ent	1	10 Form 99	X	
BAA						LOUIN 3	7U-FF	(2010)

Form 990-PF	(2016)	George	and	Lucy	Malmberg	Foundation

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~		- n	4	4		•	7	٦.	

Page 5

Par	T VII-A	Statements Regarding Activities (continued)					
11	At any time within the i	e during the year, did the foundation, directly or indirectly, own a controlled entity meaning of section 512(b)(13)? If 'Yes,' attach schedule (see instructions)			11	Yes	No X
12		ndation make a distribution to a donor advised fund over which the foundation or a disqualified pers rivileges? If 'Yes,' attach statement (see instructions)	on had		12		X
13	Did the fou	indation comply with the public inspection requirements for its annual returns and exemption	n applica	tion?	13	_X	
	Website ad	200					
14		are in care of Maury Reiter Telephone				-247	6
		► 910 Harvest Drive Blue Bell PA ZIP + 4 ►	194	22-190			· r— ·
15		47(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — Check here	. ا۔		Ņ/Ą	•	
	and enter t	the amount of tax-exempt interest received or accrued during the year	- [15		V1	N/A
16		e during calendar year 2016, did the foundation have an interest in or a signature or other authority unities, or other financial account in a foreign country?	over a		16	Yes	No X
	enter the na	structions for exceptions and filing requirements for FinCEN Form 114. If 'Yes,' ame of the foreign country					
Par		Statements Regarding Activities for Which Form 4720 May Be Required					
		4720 if any item is checked in the 'Yes' column, unless an exception applies.				Yes	No
1 a	_	year did the foundation (either directly or indirectly)		r=1			
	(1) Engage	e in the sale or exchange, or leasing of property with a disqualified person?	Yes	X No			
		v money from, lend money to, or otherwise extend credit to (or accept it from) a ilified person?	Yes	XNo			
	\- /	h goods, services, or facilities to (or accept them from) a disqualified person?	Yes	XNo			
	(4) Pay co	ompensation to, or pay or reimburse the expenses of, a disqualified person?	Yes	X No			
		er any income or assets to a disqualified person (or make any of either available benefit or use of a disqualified person)?	Yes	XNo	:		
	foundat	to pay money or property to a government official? (Exception. Check 'No' if the tion agreed to make a grant to or to employ the official for a period after termination ernment service, if terminating within 90 days.)	Yes	Х			
t	If any ansv Regulation	wer is 'Yes' to la(1)–(6), did any of the acts fail to qualify under the exceptions described in is section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)	1 17		1 b	 N	/A
	Organizatio	ons relying on a current notice regarding disaster assistance check here	•				
•	Did the fou that were r	undation engage in a prior year in any of the acts described in 1a, other than excepted acts, not corrected before the first day of the tax year beginning in 2016?			1 c		X
2	Taxes on f	failure to distribute income (section 4942) (does not apply for years the foundation was a erating foundation defined in section 4942(j)(3) or 4942(j)(5))					
á	At the end	of tax year 2016, did the foundation have any undistributed income (lines 6d	~				
	and 6e, Pa	art XIII) for tax year(s) beginning before 2016?	Yes	XNo			i
	If 'Yes,' lis	st the years > 20 , 20 , 20 , 20					
	(relating to all years lis	any years listed in 2a for which the foundation is not applying the provisions of section 4942 to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942 tisted, answer 'No' and attach statement — see instructions)	(a)(2) to		2 b	 N	/A_
•	If the provi	isions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years	here				
	► 20	, 20 , 20 , 20					
3 a		undation hold more than a 2% direct or indirect interest in any business at any time during the year?	Yes	X No			
ı	(3) the laps	d it have excess business holdings in 2016 as a result of (1) any purchase by the foundation fied persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approve mmissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or se of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to if the foundation had excess business holdings in 2016)	ed		3 b	N	/A
4 8		undation invest during the year any amount in a manner that would jeopardize its		•	4 a		X
1	b Did the fou jeopardize i	undation make any investment in a prior year (but after December 31, 1969) that could its charitable purpose that had not been removed from jeopardy before the first day of ar beginning in 2016?			4 b		<u>X</u>
DA A				F-	00	O DC	2016)

Part VII-B Statements Regarding Activiti	os for Which Form	10N 	wired (continued)	41/53	Page 6
·		4/20 may be ked	uneu (conunuea)	— Т	
 5 a During the year did the foundation pay or incu (1) Carry on propaganda, or otherwise attempt 	-	n (section 4945(e))?	Yes X] No	
(2) Influence the outcome of any specific public on, directly or indirectly, any voter registra		4955), or to carry	☐ Yes X		
(3) Provide a grant to an individual for travel,		purposes?	Yes X		
(4) Provide a grant to an organization other than in section 4945(d)(4)(A)? (see instructions	a charitable, etc , organia)	zation described	Yes X] No	
(5) Provide for any purpose other than religion educational purposes, or for the prevention] No				
b If any answer is 'Yes' to 5a(1)—(5), did any of described in Regulations section 53.4945 or in (see instructions)?	5 b	N/A			
Organizations relying on a current notice rega	rding disaster assistand	e check here	► [
c If the answer is 'Yes' to question 5a(4), does tax because it maintained expenditure response	sibility for the grant?		N/A Yes] No	
If 'Yes,' attach the statement required by Regu					
6 a Did the foundation, during the year, receive ar on a personal benefit contract?			∐Yes ∑	No	
b Did the foundation, during the year, pay premif 'Yes' to 6b, file Form 8870	ums, directly or indirec	tly, on a personal bene	fit contract?	6 b	X
7 a At any time during the tax year, was the found	dation a party to a prohi	ibited tax shelter transa	iction? Yes X	No	
b If 'Yes,' did the foundation receive any procee				N/A 7b	
Part VIII Information About Officers, Danie and Contractors	irectors, Trustees,	Foundation Manag	gers, Highly Paid	Employees	5,
1 List all officers, directors, trustees, foundation	n managers and their o	compensation (see inst	ructions).		
(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	l ather o	e account, llowances
Ludmilla P. Malmberg 401 S. Palm Avenue #901 Sarasota, Fl 4236	Trustee 0	0.	0.		0.
Gloria M. Bartow 110 Alders Drive Wilmington, DE 19803	Trustee 0	0.	0.		0.
Deborah Kreider 329 Nichols Avenue Wilmington, DE 19803	Trustee 0	0.	0.		0.
Maury B. Reiter 910 Harvest Drive	Trustee 0	0.	0.		0.
Blue Bell, PA 19422				<u> </u>	
2 Compensation of five highest-paid employees (o	ther than those included	on line 1 – see instructio		<u>E.'</u>	
(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		se account, llowances
None	!				
		;			
				ļ	
				-	
Total number of other employees paid over \$50,00	o .			-	0
BAA	TEEA0306L I	2/16/16		Form 99 0)-PF (2016)

	81-6941/53 Page /
Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly and Contractors (continued)	Paid Employees,
3 Five highest-paid independent contractors for professional services (see instructions). If none, enter 'NO	DNE.'
(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 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 N/A	
202	
2	
3	
<u> </u>	
4	
ED CANN D. C	
Part X-B. Summary of Program-Related Investments (see instructions) Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
	. – – –
N/A	
2	
All other program-related investments See instructions.	
3	
·	
Total. Add lines 1 through 3	0.
BAA	Form 990-PF (2016)

Form 990-PF (2016) George and Lucy Malmberg Foundation	81-6941753 Page 8
Part X Minimum Investment Return (All domestic foundations must complete this page instructions.)	part. Foreign foundations,
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
b Average of monthly cash balances	16
c Fair market value of all other assets (see instructions)	10
d Total (add lines 1a, b, and c)	1d 0.
e Reduction claimed for blockage or other factors reported on lines 1a and	
1c (attach detailed explanation)	
2 Acquisition indebtedness applicable to line 1 assets	2
3 Subtract line 2 from line 1d	3
4 Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4
5 Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5 0.
6 Minimum investment return. Enter 5% of line 5	6 0.
Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private and certain foreign organizations check here ► and do not complete this	
1 Minimum investment return from Part X, line 6	1
2a Tax on investment income for 2016 from Part VI, line 5	
b Income tax for 2016 (This does not include the tax from Part VI).	
c Add lines 2a and 2b.	2c
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 0.
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.	1 a
b Program-related investments — total from Part IX-B	1 b
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purpos	ses 2
3 Amounts set aside for specific charitable projects that satisfy the a Suitability test (prior IRS approval required)	
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, lin	ne 4 4 0.
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
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6 0.
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating wheth qualifies for the section 4940(e) reduction of tax in those years	ner the foundation
BAA	Form 990-PF (2016)

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2015	(c) 2015	(d) 2016
Distributable amount for 2016 from Part XI, line 7				
2 Undistributed income, if any, as of the end of 2016.				0.
a Enter amount for 2015 only			0.	
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				1
XII, line 4 * \$				
a Applied to 2015, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required — see instructions)		0.		
c Treated as distributions out of corpus				
(Election required – see instructions)	0.			
d Applied to 2016 distributable amount				0.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2016 (If an amount appears in column (d), the	0.			0.
same amount must be shown in column (a))				1
_			j	
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
	<u> </u>			-
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		_		i
amount — see instructions		0.		
e Undistributed income for 2015 Subtract line 4a from			2	,
line 2a Taxable amount — see instructions			0.	_
f Undistributed income for 2016. Subtract lines				
4d and 5 from line 1. This amount must be distributed in 2017				0.
7 Amounts treated as distributions out of				<u> </u>
corous to satisfy requirements imposed by				1
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.				
		<u> </u>		

Form 990-PF (2016) George and Lucy				81-6941753	N/A	
Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)						
1 a If the foundation has received a ruling or determined is effective for 2016, enter the date of the	ruling					
b Check box to indicate whether the foundate		erating foundation d		4942(J)(3) or	4942(j)(5)	
2a Enter the lesser of the adjusted net income from Part I or the minimum	Tax year		Prior 3 years		(e) Total	
investment return from Part X for each year listed	(a) 2016	(b) 2015	(c) 2014	(d) 2013		
b 85% of line 2a						
c Qualifying distributions from Part XII, line 4 for each year listed						
d Amounts included in line 2c not used directly for active conduct of exempt activities.						
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c.						
3 Complete 3a, b, or c for the alternative test relied upon						
a 'Assets' alternative test — enter						
(1) Value of all assets						
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)						
b 'Endowment' alternative test — enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed						
c 'Support' alternative test — enter						
 Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 						
512(a)(5)), or royalties)				<u> </u>		
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)						
(3) Largest amount of support from an exempt organization						
(4) Gross investment income						
Part XV Supplementary Information	(Complete this	part only if the	foundation had	l \$5,000 or more	in	
assets at any time during th		structions.)				
1 Information Regarding Foundation Managers of the foundation who have close of any tax year (but only if they have None	e contributed more t	han 2% of the total co than \$5,000). (See	ontributions received section 507(d)(2))	by the foundation bef	ore the	
		<u> </u>				
 List any managers of the foundation who own a partnership or other entity) of which the None 				e portion of the ownei	rship of	
2 Information Properties Contained Contained	Cit Lana Cabalana	his sta Bussiania	-			
2 Information Regarding Contribution, Grant, Check here ☐ if the foundation only ma requests for funds. If the foundation makes g	ikes contributions to	preselected charitable				
complete items 2a, b, c, and d.		h hh n	paleations should be	and an and		
a The name, address, and telephone number of	r e-mail address of t	ne person to whom a	pplications should be	e addressed		
See Statement 2						
b The form in which applications should be	submitted and info	rmation and materia	als they should inclu	ude		
			•			
See Statement for Line 2a	- 					
•						
See Statement for Line 2a						
d Any restrictions or limitations on awards,	such as by geograp	phical areas, charita	ble fields, kinds of	institutions, or other	factors	
See Statement for Line 2a						
BAA	TE	EA0310L 12/16/16		F	orm 990-PF (2016)	

Page 11

3 Grants and Contributions Paid During the Ye	ar or Approved for Fut	ure Paymen	it	N/A
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	or substantial contributor	recipient	Contribution	1
a Paid during the year				
				1
None in 2016				
MORE III 2010				
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Total	L <u> </u>		► 3a	
b Approved for future payment		<u> </u>	1	
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	<u> </u>	<u> </u>	J	ļ
Total.			. ► 31	

Program service revenue Page 1 Program service revenue Amount Code Program service revenue Program service revenue Amount Code Program service revenue Program s	nter gross	s amounts unless otherwise indicated		business income		section 512, 513, or 514	(e)
a code a code a code b c d c c code 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 5 Net rental income or (loss) from real estate a Debt-financed property b Not debt-financed property b Not debt-financed property 7 Other investment income 8 Gain or (loss) from sales of assets other than inventory 9 Net income or (loss) from special events 0 Gross profit or (loss) from sales of inventory 1 Other revenue a b c c c c d c c c c c c c c c c c c c c					Exclu- sion	(d) Amount	Related or exemp function income
b c d d e e f f g Fees and contracts from government agencies e e f g Fees and contracts from government agencies e e f g Fees and contracts from government agencies e e f g Fees and contracts from government agencies e e f g Fees and contracts from securities e f g Fees and interest f g Fees and interest from securities e f	_	ram service revenue	-		code		
de e grees and contracts from government agencies grees and contracts from government grees grees and contracts from government grees grees grees and contracts from government grees g					-		
f g Fees and contracts from government agencies Membership dues and assessments Interest on savings and temporary cash investments Dividends and interest from securities Net rental income or (loss) from real estate a Debt-financed property Not debt-financed property Not income or (loss) from personal property Other investment income Gain or (loss) from sales of assets other than inventory Net income or (loss) from sales of inventory Other revenue Company of the sales of inventory Other revenue Subtotal. Add columns (b), (d), and (e) Subtotal. Add line 12, columns (b), (d), and (e) Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes) (See instructions.)			+				
g Fees and contracts from government agencies Membership dues and assessments Interest on savings and temporary cash investments Dividends and interest from securities Net rental income or (loss) from real estate a Debt-financed property b Not debt-financed property Other investment income Gain or (loss) from personal property Other investment income Gross) from sales of assets other than inventory Net income or (loss) from special events Gross profit or (loss) from sales of inventory Other revenue a b c Subtotal. Add columns (b), (d), and (e) Subtotal. Add line 12, columns (b), (d), and (e) exercised and line 13 instructions to verify calculations.) Beat XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes (See instructions.)							
Membership dues and assessments Interest on savings and temporary cash investments Dividends and interest from securities Not rental income or (loss) from real estate a Debt-financed property b Not debt-financed property Not rental income or (loss) from personal property Not investment income Gain or (loss) from sales of assets other than inventory Not income or (loss) from special events Gross profit or (loss) from sales of inventory Other revenue a b b Total. Add columns (b), (d), and (e) e Subtotal. Add columns (b), (d), and (e) e worksheet in line 13 instructions to verify calculations.) art XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes ine No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions.)	е						
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art XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes Line No. ■ Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions.)			<u> </u>			12	
Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions.)	3 Total	. Add line 12, columns (b), (d), and (e)	ions)			13	
	3 Total ee works	. Add line 12, columns (b), (d), and (e) sheet in line 13 instructions to verify calculate		hment of Exem	nt Purpose		
	3 Total ee works art XVI ine No.	Add line 12, columns (b), (d), and (e) sheet in line 13 instructions to verify calculate. B Relationship of Activities to the	e Accomplis		<u> </u>	es	
	3 Total ee works art XVI ine No.	Add line 12, columns (b), (d), and (e) sheet in line 13 instructions to verify calculate. B Relationship of Activities to the	e Accomplis		<u> </u>	es	
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Form 990-	-PF (2016) George	and Lucy	Malmberg Foundation	n		81-6943	1753	Pa	age 13
Part XV	Il Information Re	garding Tran	sfers To and Transaction	ons and Re	lationships	With Noncha	aritable	- 1	
	Exempt Organi	zations							
1 Did to	the organization directly cribed in section 501(c)	y or indirectly er of the Code (ot	ngage in any of the following wher than section 501(c)(3) org	with any other anizations) or	r organization r in section 52	7,		Yes	No
relat	ting to political organiza	ations?	a noncharitable exempt organ				j		
	Cash	•	a nonchamable exempt organ	ization: or			1a(1)		Х
• •	Other assets	••	, .	•			1a(2)		X
	er transactions:								
(1)	Sales of assets to a no	ncharitable exer	mpt organization				16(1)		Х
(2)	Purchases of assets fro	om a noncharital	ole exempt organization				1 b (2)		X
(3) 1	Rental of facilities, equi	pment, or other	assets				1 b (3)		X
(4)	Reimbursement arrangi	ements			•		1 b (4)		X
• • •	Loans or loan guarante						1 b (5)		X
• • •			o or fundraising solicitations				1 b (6)	ļ	X
c Shar	ring of facilities, equipm	nent, mailing list	ts, other assets, or paid emplo	oyees			1 c		X
d If the	e answer to any of the a goods, other assets, or se transaction or sharing a	above is 'Yes,' o	complete the following schedu he reporting foundation. If the fo ow in column (d) the value of	le. Column (bundation receiption the goods, of) should alway ved less than fa ther assets, or	ys show the fair it air market value in services receive	market val 1 ed.	ue of	
(a) Line no.			noncharitable exempt organization	 _		rs, transactions, and		ngement	ts
N/A									
		I							
				<u> </u>					
	 								
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	<u> </u>		······································						
					-	· · · · · · · · · · · · · · · · · · ·			
desc		of the Code (otl	with, or related to, one or more her than section 501(c)(3)) or				Yes	x	No
<u> </u>	(a) Name of organizat		(b) Type of organization	on I	(c)	Description of rel	ationship		
N/A	(a)		(a) type of organization		(3)				
			· · · · · · · · · · · · · · · · · · ·						
	<u> </u>	1							
Un	der penalties of perjury, I declaration	are that I have examin	ned this return, including accompanying han taxpayer) is based on all informatio	schedules and sta	atements, and to the	e best of my knowledg	e and belief,	it is true	2.
Sign Here	Ludmie	a P.VI	Malmbag 18/09	12 In	ıstee		May the thus return preparer (see upst	n with ti shown	he below
	Signature of officer or trustee		Cate	Title		1 1		Yes	No
Dai#	Print/Type preparer's na Taylor A Sm		Taylor A Smith	- 1	ate 8/10/17	Check It	PTIN P0185	9705	
Paid Prepare			wart Meloff Reiter	<u></u> _		rm's ElN ►	110100	<i>,,</i> ,,,	
Use Onl	_	910 Harves		una stel					
-30 VIII	יד די די <u>די</u>	vc3							

(610) 941-2520

Form 990-PF (2016)

Phone no

910 Harvest Drive Blue Bell, PA 19422

BAA

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

Schedule of Contributors

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

Attach to Form 990, Form 990-EZ, or Form 990-PF.

2016

OMB No 1545-0047

Department of the Treasury Internal Revenue Service

Name of the organization Employer (dentification number George and Lucy Malmberg Foundation 81-6941753 Organization type (check one) Filers of Section: 501(c)(Form 990 or 990-EZ) (enter number) organization 4947(a)(1) nonexempt charitable trust not treated as a private foundation 527 political organization X 501(c)(3) exempt private foundation Form 990-PF 4947(a)(1) nonexempt charitable trust treated as a private foundation 501(c)(3) taxable private foundation Check 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 [X] 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)(v), 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,

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)

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

BAA 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 org	B (Form 990, 990-EZ, or 990-PF) (2016)	Page	1 of 1 of Part
, -	e and Lucy Malmberg Foundation		er identification number 941753
Part I	Contributors (see instructions) Use duplicate copies of Part I if additional space	e is needed	
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
	Ludmilla P. Malmberg 401 S Palm Avenue #901 Sarasota, FL 34236	_ _\$5,000,000. _	Person X Payroll Noncash (Complete Part II for noncash contributions.)
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		 \$=	Person Payroll Complete Part II for noncash contributions.)
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		- \$	Person Payroll Complete Part II for noncash contributions.)
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		- \$	Person Payroll Complete Part II for noncash contributions.)
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
-		- - - -	Person Payroll Complete Part II for noncash contributions.)
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		- \$	Person
BAA	TEEA0702L 08/09/16	Schedule B (Form 99	90, 990-EZ, or 990-PF) (2016)

	3 (Form 990, 990-EZ, or 990-PF) (2016)	Page	1 to	1 of Part II
lame of organ	and Lucy Malmberg Foundation		81-6941	tification number
Part II		ace is need		733
(a) No. from Part I	(b) Description of noncash property given		(c) estimate) tructions)	(d) Date received
	N/A			
		\$		
(a) No. from Part I	(b) Description of noncash property given	FMV (or (see ins	(c) estimate) tructions)	(d) Date received
		\$		
(a) No. from Part I	(b) Description of noncash property given	FMV (or	(c) estimate) tructions)	(d) Date received
		^	ļ	
(a) No.	(b)	 	(c)	(d)
(a) No. from Part I	(b) Description of noncash property given	FMV (or (see ins	(c) estimate) tructions)	(d) Date received
(a) Na	A.)	\$		
(a) No. from Part I	(b) Description of noncash property given	FMV (or (see ins	(c) estimate) tructions)	(d) Date received
		\$ 		
(a) No. from Part I	(b) Description of noncash property given	FMV (or (see ins	(c) estimate) tructions)	(d) Date received
				1

Schedule B (Form 990, 990-EZ, or 990-PF) (2016)

BAA

Name of organ	nization and Lucy Malmberg Foundatio	n	Employer identification number 81 – 6941753					
Part III			ations described in section 501(c)(7), (8),					
i ait iii	or (10) that total more than \$1,000 for t	the year from any one contribute	Attoris described in section sur(c)(7), (0),					
	the following line entry For organizations of	completing Part III, enter the total of	exclusively religious, charitable, etc.					
	contributions of \$1,000 or less for the year.	(Enter this information once. See ii	nstructions.) • \$N/A					
	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					
	N/A							
		<u> </u>						
	f	(e) Transfer of gift						
	Transferee's name, addres		Relationship of transferor to transferee					
(a) No. from	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held					
Part I	Purpose of gift	Ose of gift	Description of now gire is need					
]						
		<u> </u>						
		(e) Transfer of gift						
	Transferee's name, addres	ss, and ZIP + 4	Relationship of transferor to transferee					
(a) No. from	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held					
Part I	Lamposo or give		2030.15.101.01.101.031.101.2					
	(e) Transfer of gift							
	Transferee's name, addre	ss, and ZIP + 4	Relationship of transferor to transferee					
	L							
	 							
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held					
Part I	<u> </u>							
		 						
		 						
	<u> </u>							
		(e) Transfer of gift						
	Transferee's name, addre	ss, and ZIP + 4	Relationship of transferor to transferee					
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BAA	<u> </u>		Schedule B (Form 990, 990-EZ, or 990-PF) (2016)					
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Page

1 to

1 of Part III

Schedule B (Form 990, 990-EZ, or 990-PF) (2016)

2016

Federal Statements

Page 1

George and Lucy Malmberg Foundation

81-6941753

Statement 1 Form 990-PF, Part VII-A, Line 10 Substantial Contributors During the Tax Year

Name of Substantial Contributor Address of Substantial Contributor

Ludmilla P. Malmberg

401 S. Palm Avenue, # 901 Sarasota, FL 34236

Statement 2 Form 990-PF, Part XV, Line 2a-d Application Submission Information

Name of Grant Program:

Name:

Ludmilla P. Malmberg

Care Of:

Street Address: City, State, Zip Code:

401 S. Palm Avenue #901 Sarasota, FL 34236 (941)-549-9733

Telephone:

E-Mail Address:

Form and Content:

Grant request application form and related forms in

process of being completed

Submission Deadlines:

none

Restrictions on Awards:

none