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Form 990-PF

Department of the Treasury  
Internal Revenue Service

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

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Information about Form 990-PF and its instructions is at [www.irs.gov/form990pf](http://www.irs.gov/form990pf).

OMB No 1545-0052

2016

Open to Public Inspection

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

Name of foundation DR WC SWANSON FOUNDATION		A Employer identification number 87-0578540	
Number and street (or P O box number if mail is not delivered to street address) 2454 NORTH HIGHWAY 89		B Telephone number (see instructions) (801) 392-0360	
City or town, state or province, country, and ZIP or foreign postal code HARRISVILLE, UT 84404		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 1,637,723		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
J Accounting method <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis )			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions) )

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	210,832		
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B . . . . .			
	3 Interest on savings and temporary cash investments	1,392	1,392	1,392
	4 Dividends and interest from securities . . . . .	182,340	179,582	182,340
	5a Gross rents . . . . .			
	b Net rental income or (loss)			
	6a Net gain or (loss) from sale of assets not on line 10	-37,302		
	b Gross sales price for all assets on line 6a			
		1,125,188		
	7 Capital gain net income (from Part IV, line 2) . . . . .			
	8 Net short-term capital gain . . . . .			
	9 Income modifications . . . . .			
Operating and Administrative Expenses	10a Gross sales less returns and allowances			
	b Less Cost of goods sold . . . . .			
	c Gross profit or (loss) (attach schedule) . . . . .			
	11 Other income (attach schedule) . . . . .	13,103		13,103
	12 Total. Add lines 1 through 11 . . . . .	370,365	180,974	196,835
	13 Compensation of officers, directors, trustees, etc	233,756	49,089	184,667
	14 Other employee salaries and wages . . . . .	67,122	20,137	46,985
	15 Pension plans, employee benefits . . . . .	67,257	16,814	50,443
	16a Legal fees (attach schedule) . . . . .			
	b Accounting fees (attach schedule) . . . . .	3,520	1,056	2,464
	c Other professional fees (attach schedule) . . . . .	668	200	468
	17 Interest . . . . .	7,123	7,123	
	18 Taxes (attach schedule) (see instructions) . . . . .			
	19 Depreciation (attach schedule) and depletion . . . . .	25,787	25,787	25,787
	20 Occupancy . . . . .	17,320	17,320	
	21 Travel, conferences, and meetings . . . . .	19,300	5,790	13,510
22 Printing and publications . . . . .				
23 Other expenses (attach schedule) . . . . .	126,209	56,456	69,753	
24 Total operating and administrative expenses. Add lines 13 through 23 . . . . .	568,062	199,772	25,787	
25 Contributions, gifts, grants paid . . . . .	380,996		380,996	
26 Total expenses and disbursements. Add lines 24 and 25	949,058	199,772	25,787	
27 Subtract line 26 from line 12				
a Excess of revenue over expenses and disbursements	-578,693			
b Net investment income (if negative, enter -0-)		0		
c Adjusted net income (if negative, enter -0-)			171,048	

For Paperwork Reduction Act Notice, see instructions.

Cat No 11289X

Form 990-PF (2016)

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)			
		Beginning of year (a) Book Value	End of year (b) Book Value (c) Fair Market Value		
Assets	1	Cash—non-interest-bearing . . . . .	866,438	156,034	156,034
	2	Savings and temporary cash investments . . . . .	83,992	453,214	453,214
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable . . . . .			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use . . . . .	7,000		
	9	Prepaid expenses and deferred charges . . . . .			
	10a	Investments—U S and state government obligations (attach schedule)	117,002	58,157	
	b	Investments—corporate stock (attach schedule) . . . . .	4,006,357	3,631,365	
	c	Investments—corporate bonds (attach schedule) . . . . .			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans . . . . .			
	13	Investments—other (attach schedule) . . . . .			
	14	Land, buildings, and equipment basis ▶ <u>1,447,501</u> Less accumulated depreciation (attach schedule) ▶ <u>419,026</u>	1,005,418	1,028,475	1,028,475
15	Other assets (describe ▶ _____)	1,330,378	1,201,327		
16	<b>Total assets</b> (to be completed by all filers—see the instructions Also, see page 1, item I)	7,416,585	6,528,572	1,637,723	
Liabilities	17	Accounts payable and accrued expenses . . . . .	3,655	3,197	
	18	Grants payable . . . . .			
	19	Deferred revenue . . . . .			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule) . . . . .	1,089,994	609,994	
	22	Other liabilities (describe ▶ _____)			
	23	<b>Total liabilities</b> (add lines 17 through 22) . . . . .	1,093,649	613,191	
Net Assets or Fund Balances	<b>Foundations that follow SFAS 117, check here</b> <input checked="" type="checkbox"/> <b>and complete lines 24 through 26 and lines 30 and 31.</b>				
	24	Unrestricted . . . . .	6,322,936	5,915,381	
	25	Temporarily restricted . . . . .			
	26	Permanently restricted . . . . .			
	<b>Foundations that do not follow SFAS 117, check here</b> <input type="checkbox"/> <b>and complete lines 27 through 31.</b>				
	27	Capital stock, trust principal, or current funds . . . . .			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	<b>Total net assets or fund balances</b> (see instructions) . . . . .	6,322,936	5,915,381	
31	<b>Total liabilities and net assets/fund balances</b> (see instructions) .	7,416,585	6,528,572		

**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	6,322,936
2	Enter amount from Part I, line 27a . . . . .	2	-578,693
3	Other increases not included in line 2 (itemize) ▶ _____	3	171,138
4	Add lines 1, 2, and 3 . . . . .	4	5,915,381
5	Decreases not included in line 2 (itemize) ▶ _____	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	5,915,381

**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 )
<b>1 a</b> PUBLICLY TRADED STOCKS-ATTACHMENT B	P	2015-07-01	2016-06-30
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

  

(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)
<b>a</b> 1,125,188		1,162,490	-37,302
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

  

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
<b>a</b>			-37,302
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

  

<b>2</b> Capital gain net income or (net capital loss)	<div> <div>If gain, also enter in Part I, line 7</div> <div>If (loss), enter -0- in Part I, line 7</div> </div>	<b>2</b>	-37,302
<b>3</b> Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)	<div> <div>If gain, also enter in Part I, line 8, column (c) (see instructions)</div> <div>If (loss), enter -0- in Part I, line 8</div> </div>	<b>3</b>	

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

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

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

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



Yes



No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2015	428,851	4,390,688	0 097673
2014	289,062	4,367,985	0 066177
2013	404,475	2,504,083	0 161526
2012	1,142,385	2,847,618	0 401172
2011	1,039,667	2,891,373	0 359576
<b>2</b> Total of line 1, column (d)			<b>2</b> 1 086124
<b>3</b> 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			<b>3</b> 0 217225
<b>4</b> Enter the net value of noncharitable-use assets for 2016 from Part X, line 5			<b>4</b> 4,628,676
<b>5</b> Multiply line 4 by line 3			<b>5</b> 1,005,464
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)			<b>6</b>
<b>7</b> Add lines 5 and 6			<b>7</b> 1,005,464
<b>8</b> Enter qualifying distributions from Part XII, line 4			<b>8</b> 749,286

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

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

<b>1a</b>	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>b</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 . . . . .	<b>1</b>	<b>0</b>
<b>c</b>	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
<b>2</b>	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>2</b>	
<b>3</b>	Add lines 1 and 2. . . . .	<b>3</b>	
<b>4</b>	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>4</b>	
<b>5</b>	<b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0- . . . . .	<b>5</b>	
<b>6</b>	Credits/Payments		
<b>a</b>	2016 estimated tax payments and 2015 overpayment credited to 2016	<b>6a</b>	
<b>b</b>	Exempt foreign organizations—tax withheld at source . . . . .	<b>6b</b>	
<b>c</b>	Tax paid with application for extension of time to file (Form 8868) . . . . .	<b>6c</b>	
<b>d</b>	Backup withholding erroneously withheld . . . . .	<b>6d</b>	
<b>7</b>	Total credits and payments. Add lines 6a through 6d. . . . .	<b>7</b>	
<b>8</b>	Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	<b>8</b>	
<b>9</b>	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b> . . . . . ▶	<b>9</b>	
<b>10</b>	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b> . . . . . ▶	<b>10</b>	
<b>11</b>	Enter the amount of line 10 to be <b>Credited to 2017 estimated tax</b> ▶ <b>Refunded</b> ▶	<b>11</b>	

**Part VII-A Statements Regarding Activities**

	Yes	No
<b>1a</b> 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? . . . . .	<b>1a</b>	<b>No</b>
<b>b</b> Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? . . . . . <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities</i>	<b>1b</b>	<b>No</b>
<b>c</b> Did the foundation file <b>Form 1120-POL</b> for this year? . . . . .	<b>1c</b>	<b>No</b>
<b>d</b> Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ▶ \$ _____ (2) On foundation managers ▶ \$ _____		
<b>e</b> Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ _____		
<b>2</b> Has the foundation engaged in any activities that have not previously been reported to the IRS? . . . . . <i>If "Yes," attach a detailed description of the activities</i>	<b>2</b>	<b>No</b>
<b>3</b> Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i> . . . . .	<b>3</b>	<b>No</b>
<b>4a</b> Did the foundation have unrelated business gross income of \$1,000 or more during the year? . . . . .	<b>4a</b>	<b>No</b>
<b>b</b> If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year? . . . . .	<b>4b</b>	
<b>5</b> Was there a liquidation, termination, dissolution, or substantial contraction during the year? . . . . . <i>If "Yes," attach the statement required by General Instruction T</i>	<b>5</b>	<b>No</b>
<b>6</b> 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? . . . . .	<b>6</b>	<b>Yes</b>
<b>7</b> Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i> . . . . .	<b>7</b>	<b>Yes</b>
<b>8a</b> Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ _____		
<b>b</b> If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation</i> .	<b>8b</b>	<b>Yes</b>
<b>9</b> Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i> . . . . .	<b>9</b>	<b>No</b>
<b>10</b> Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i> . . . . .	<b>10</b>	<b>No</b>

**Part VII-A Statements Regarding Activities** (continued)

<b>11</b>	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).	<b>11</b>		<b>No</b>
<b>12</b>	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)	<b>12</b>		<b>No</b>
<b>13</b>	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <b>►</b> N/A	<b>13</b>	<b>Yes</b>	
<b>14</b>	The books are in care of <b>►</b> CINDY PURCELL Telephone no <b>►</b> (801) 392-0360			

Located at **►** 2454 NORTH HWY 89 OGDEN UT ZIP+4 **►** 84404

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

**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.**

<b>1a</b>	During the year did the foundation (either directly or indirectly)		<b>Yes</b>	<b>No</b>
	(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 type="checkbox"/> Yes <input checked="" 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? ( <b>Exception.</b> 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>b</b>	If any answer is "Yes" to 1a(1)–(6), did <b>any</b> 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)? <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here. <b>►</b> <input type="checkbox"/>	<b>1b</b>		
<b>c</b>	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? <input type="checkbox"/>	<b>1c</b>		
<b>2</b>	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))			
<b>a</b>	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>►</b> 20____, 20____, 20____, 20____			
<b>b</b>	Are there any years listed in 2a for which the foundation is <b>not</b> 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 <b>all</b> years listed, answer "No" and attach statement—see instructions). <input type="checkbox"/>	<b>2b</b>		
<b>c</b>	If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here <b>►</b> 20____, 20____, 20____, 20____			
<b>3a</b>	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>b</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). <input type="checkbox"/>	<b>3b</b>		
<b>4a</b>	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	<b>4a</b>		<b>No</b>
<b>b</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?	<b>4b</b>		<b>No</b>

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

<b>5a</b> During the year did the foundation pay or incur any amount to <b>(1)</b> Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? <span style="float:right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span> <b>(2)</b> Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? <span style="float:right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span> <b>(3)</b> Provide a grant to an individual for travel, study, or other similar purposes? <span style="float:right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span> <b>(4)</b> Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions). <span style="float:right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span> <b>(5)</b> Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? <span style="float:right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span> <b>b</b> If any answer is "Yes" to 5a(1)–(5), did <b>any</b> 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)? <span style="float:right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span> Organizations relying on a current notice regarding disaster assistance check here. <span style="float:right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span> <b>c</b> 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? <span style="float:right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span> If "Yes," attach the statement required by Regulations section 53.4945–5(d)	<b>5b</b>		
<b>6a</b> Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? <span style="float:right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span> <b>b</b> Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <span style="float:right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span> If "Yes" to 6b, file Form 8870	<b>6b</b>		<b>No</b>
<b>7a</b> At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? <span style="float:right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span> <b>b</b> If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? <span style="float:right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span>	<b>7b</b>		

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

<b>1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).</b>				
(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
CINDY R PURCELL 2454 HIGHWAY 89 OGDEN, UT 84404	CEO 000 00	105,756	0	0
WC SWANSON 2454 NORTH HIGHWAY 89 OGDEN, UT 84404	CHAIRMAN 000 00	90,000	0	0
CHRISTINE ELLIS 1028 STOVE DRIVE OGDEN, UT 84404	CFO 000 00	38,000	0	0
<b>2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."</b>				
(a) Name and address of each employee paid more than \$50,000	Title, and average hours per week (b) devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
NONE				
<b>Total number of other employees paid over \$50,000.</b> <span style="float:right;">▶</span>				

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

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

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

**Part IX-A** **Summary of Direct Charitable Activities**

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

	Expenses
<b>1</b> SEE PART XV	380,996
<b>2</b>	
<b>3</b>	
<b>4</b>	

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

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



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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
<b>a</b>	Average monthly fair market value of securities.	<b>1a</b>	3,818,861
<b>b</b>	Average of monthly cash balances.	<b>1b</b>	880,302
<b>c</b>	Fair market value of all other assets (see instructions).	<b>1c</b>	0
<b>d</b>	<b>Total</b> (add lines 1a, b, and c).	<b>1d</b>	4,699,163
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	<b>1e</b>	
<b>2</b>	Acquisition indebtedness applicable to line 1 assets.	<b>2</b>	
<b>3</b>	Subtract line 2 from line 1d.	<b>3</b>	4,699,163
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	<b>4</b>	70,487
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4.	<b>5</b>	4,628,676
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5.	<b>6</b>	231,434

**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.)

<b>1</b>	Minimum investment return from Part X, line 6.	<b>1</b>	231,434
<b>2a</b>	Tax on investment income for 2016 from Part VI, line 5.	<b>2a</b>	
<b>b</b>	Income tax for 2016 (This does not include the tax from Part VI).	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b.	<b>2c</b>	
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1.	<b>3</b>	231,434
<b>4</b>	Recoveries of amounts treated as qualifying distributions.	<b>4</b>	
<b>5</b>	Add lines 3 and 4.	<b>5</b>	231,434
<b>6</b>	Deduction from distributable amount (see instructions).	<b>6</b>	
<b>7</b>	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	<b>7</b>	231,434

**Part XII Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
<b>a</b>	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26.	<b>1a</b>	749,286
<b>b</b>	Program-related investments—total from Part IX-B.	<b>1b</b>	
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the		
<b>a</b>	Suitability test (prior IRS approval required).	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule).	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	<b>4</b>	749,286
<b>5</b>	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).	<b>5</b>	
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4.	<b>6</b>	749,286

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

**Part XIII Undistributed Income** (see instructions)

	(a) Corpus	(b) Years prior to 2015	(c) 2015	(d) 2016
<b>1</b> Distributable amount for 2016 from Part XI, line 7				231,434
<b>2</b> Undistributed income, if any, as of the end of 2016				
<b>a</b> Enter amount for 2015 only. . . . .				
<b>b</b> Total for prior years 20____, 20____, 20____				
<b>3</b> Excess distributions carryover, if any, to 2016				
<b>a</b> From 2011. . . . .	891,327			
<b>b</b> From 2012. . . . .	855,435			
<b>c</b> From 2013. . . . .	279,271			
<b>d</b> From 2014. . . . .	70,663			
<b>e</b> From 2015. . . . .	209,317			
<b>f</b> <b>Total</b> of lines 3a through e. . . . .	2,306,013			
<b>4</b> Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ 749,286				
<b>a</b> Applied to 2015, but not more than line 2a				
<b>b</b> Applied to undistributed income of prior years (Election required—see instructions). . . . .				
<b>c</b> Treated as distributions out of corpus (Election required—see instructions). . . . .				
<b>d</b> Applied to 2016 distributable amount. . . . .				231,434
<b>e</b> Remaining amount distributed out of corpus	517,852			
<b>5</b> Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a) )				
<b>6 Enter the net total of each column as indicated below:</b>				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5	2,823,865			
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b . . . . .				
<b>c</b> 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. . . . .				
<b>d</b> Subtract line 6c from line 6b Taxable amount—see instructions . . . . .				
<b>e</b> Undistributed income for 2015 Subtract line 4a from line 2a Taxable amount—see instructions . . . . .				
<b>f</b> Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2017 . . . . .				0
<b>7</b> 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). . . . .				
<b>8</b> Excess distributions carryover from 2011 not applied on line 5 or line 7 (see instructions). . . . .	891,327			
<b>9 Excess distributions carryover to 2017.</b> Subtract lines 7 and 8 from line 6a . . . . .	1,932,538			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2012. . . . .	855,435			
<b>b</b> Excess from 2013. . . . .	279,271			
<b>c</b> Excess from 2014. . . . .	70,663			
<b>d</b> Excess from 2015. . . . .	209,317			
<b>e</b> Excess from 2016. . . . .	517,852			

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

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

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

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

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

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

**1 Information Regarding Foundation Managers:**

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

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

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

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

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

CINDY PURCELL  
2454 NORTH HWY 89  
OGDEN, UT 84404  
(801) 392-0360  
CINDY@SWANFOUND.ORG

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

LETTER AND DETAILS OR REASON FOR REQUEST

**c** Any submission deadlines

NONE

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

NONE

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i> See Additional Data Table				
<b>Total</b> . . . . .			<b>3a</b>	380,996
<b>b</b> <i>Approved for future payment</i>				
<b>Total</b> . . . . .			<b>3b</b>	

## Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2016)

## Part XVII

- 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 |
|   |                          |                                 |
|   |                          |                                 |
|   |                          |                                 |
|   |                          |                                 |

**Sign  
Here**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

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

**Paid  
Preparer  
Use Only**

Print/Type preparer's name  GORDON JAMES CPA	Preparer's Signature	Date  2017-06-28	Check if self-employed <input type="checkbox"/>	PTIN  P00344477
Firm's name ▶ CARVER FLOREK & JAMES CPAS				Firm's EIN ▶ 52-2408237
Firm's address ▶ 2246 UNIVERSITY PARK BLVD  LAYTON, UT 840411266				Phone no (801) 926-1177

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
MONGOLIA OPERATIONS 2454 N HWY 89 OGDEN, UT 84404			HUMANITARIAN AID	10,614
WAREHOUSE PROGRAMS 2454 N HWY 89 OGDEN, UT 84404			IN-NEED ASSISTANCE	48,415
AMERICAN LEGION 2454 N HWY 89 OGDEN, UT 84404			ASSIST FUNDRAISING	2,850
YOUTH HUNT PROGRAM 2454 N HWY 89 OGDEN, UT 84404			ASSIST YOUTH MENTORING PGM	2,044
WAREHOUSE HUMAN RESOURCES 2454 N HWY 89 OGDEN, UT 84404			LOCAL DISASTER AND NEED ASSISTANCE	14,510
VARIOUS 2454 N HWY 89 OGDEN, UT 84404			AWARDS, DONATIONS	10,816
DINOSAUR PARK 2454 N HWY 89 OGDEN, UT 84404			ASSIST DINOSAUR PARK	1,475
HAND IN HAND OUTDOORS 2454 N HWY 89 OGDEN, UT 84404			ASSIST FUNDRAISING	2,990
OREGON TRAIL MUSEUM 2454 N HWY 89 OGDEN, UT 84404			ASSIST FUNDRAISING	2,000
YOUTH IMPACT 2454 N HWY 89 OGDEN, UT 84404			ASSIST YOUTH IMPACT	1,796
LABS FOR LIBERTY 2454 N HWY 89 OGDEN, UT 84404			ASSIST LABS FOR LIBERTY	10,000
YOUTH FUTURES SHELTER HOME 2454 N HWY 89 OGDEN, UT 84404			ASSIST YOUTH FUTURES	25,731
DONOR'S CHOICE 2454 N HWY 89 OGDEN, UT 84404			ASSIST DONOR'S CHOICE	28,991
UNIVERSITY OF UTAH 2454 N HWY 89 OGDEN, UT 84404			CENTER FOR GLOBAL SURGERY	150,000
WEBER SCHOOL DISTRICT FOUNDATION 2454 N HWY 89 OGDEN, UT 84404			ASSIST WEBER SCHOOL FOUNDATION	7,964
<b>Total . . . . . ▶</b> <b>3a</b>				380,996

Form 990PF Part XV Line 3 - Recipients and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
CACHE COMMUNITY FOOD PANTRY 2454 N HWY 89 OGDEN, UT 84404			ASSIST FOOD PANTRY	4,400
DAVIS CHAMBER OF COMMERCE 2454 N HWY 89 OGDEN, UT 84404			ASSIST CHAMBER OF COMMERCE	4,400
MIDTOWN COMMUNITY HEALTH CENTER 2454 N HWY 89 OGDEN, UT 84404			ASSIST HEALTH CENTER	7,000
BEAR LAKE COUNTY DRUG COURT 2454 N HWY 89 OGDEN, UT 84404			2 POSITIONS - 2 YEARS EACH	18,000
OGDEN SCHOOL FOUNDATION 2454 N HWY 89 OGDEN, UT 84404			ASSIST SCHOOL FOUNDATION	16,000
WEBER SCHOOL DISTRICT FOUNDATION 2454 N HWY 89 OGDEN, UT 84404			ASSIST FOUNDATION	4,000
THE ROCK ROLL HALL OF FAME - OHIO 2454 N HWY 89 OGDEN, UT 84404			14 RAFFELLI PHOTOGRAPHS	7,000
<b>Total . . . . .</b> <b>3a</b>				380,996



**TY 2016 Accounting Fees Schedule****Name:** DR WC SWANSON FOUNDATION**EIN:** 87-0578540

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
CARVER FLOREK AND JAMES	3,520	1,056		2,464

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

## **TY 2016 Depreciation Schedule**

**Name:** DR WC SWANSON FOUNDATION

**EIN:** 87-0578540

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
DEPRECIATION						25,787			

**TY 2016 Investments Corporate Stock Schedule****Name:** DR WC SWANSON FOUNDATION**EIN:** 87-0578540

<b>Name of Stock</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
EQUITIES	1,600,551	
MUTUAL FUNDS	2,030,814	

**TY 2016 Investments Government Obligations Schedule****Name:** DR WC SWANSON FOUNDATION**EIN:** 87-0578540**US Government Securities - End  
of Year Book Value:**

58,157

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

# **TY 2016 Land, Etc. Schedule**

**Name:** DR WC SWANSON FOUNDATION

**EIN:** 87-0578540

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
BLDG, FURN, EQP, AUTOS SEE ATTCH F	1,447,501	419,026	1,028,475	1,028,475

## TY 2016 Mortgages and Notes Payable Schedule

**Name:** DR WC SWANSON FOUNDATION

**EIN:** 87-0578540

**Total Mortgage Amount:**

<b>Item No.</b>	1
<b>Lender's Name</b>	MERRILL LYNCH LOAN
<b>Lender's Title</b>	
<b>Relationship to Insider</b>	
<b>Original Amount of Loan</b>	
<b>Balance Due</b>	609,994
<b>Date of Note</b>	
<b>Maturity Date</b>	
<b>Repayment Terms</b>	
<b>Interest Rate</b>	
<b>Security Provided by Borrower</b>	
<b>Purpose of Loan</b>	
<b>Description of Lender Consideration</b>	
<b>Consideration FMV</b>	

## TY 2016 Other Assets Schedule

**Name:** DR WC SWANSON FOUNDATION

**EIN:** 87-0578540

### Other Assets Schedule

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
UNITED WAY NOTE	768,000	724,000	
FIREHOLE RIVER CAPITAL LLC	562,378	477,327	

**TY 2016 Other Expenses Schedule****Name:** DR WC SWANSON FOUNDATION**EIN:** 87-0578540**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXPENSES				
BANK CHARGES	35,252	17,626		17,626
DUES AND SUBSCRIPTIONS	3,696	739		2,957
INFORMATION SYSTEM	8,679	1,736		6,943
INSURANCE	14,861	7,430		7,431
MISC ADMIN	25,620	12,810		12,810
OFFICE SUPPLIES	1,361	272		1,089
POSTAGE	2,037	1,019		1,018
MARKETING/CONVENTIONS	3,800	1,140		2,660
PUBLIC RELATIONS	2,219	1,110		1,109



## Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
REPAIR AND MAINTENANCE	2,650	1,060		1,590
EQP REPAIR AND MAINTENANCE	6,491	2,596		3,895
SECURITY	384	192		192
TELEPHONE	10,627	5,313		5,314
VEHICLE COSTS	8,532	3,413		5,119

## TY 2016 Other Income Schedule

**Name:** DR WC SWANSON FOUNDATION

**EIN:** 87-0578540

### Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
TACTICAL CENTER RETAIL INCOME	13,103		13,103

**TY 2016 Other Increases Schedule****Name:** DR WC SWANSON FOUNDATION**EIN:** 87-0578540

Description	Amount
DEPR ADJ	27,812
UNREALIZED GAIN	143,326

**TY 2016 Other Professional Fees Schedule****Name:** DR WC SWANSON FOUNDATION**EIN:** 87-0578540

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
FROST ADMINISTRATORS, INC	377	113		264
OTHER MISC	291	87		204

**Dr. W.C. Swanson Family Foundation, Inc**  
**87-0578540**  
**Form 990-PF - Index of Attachments**  
**2016**

			<u>Attachment</u>
Part 1	Line 1	Contributions	A
Part 1	Line 6a	Sales of Investments	B
Part I	Line 20	Occupancy	C
Part II	Line 14	Fixed Assets	D

**Dr. W.C. Swanson Family Foundation, Inc**  
**87-0578540**  
**Form 990-PF - Attachment A**  
**2016**

Contributions:

Part I, Line 1: Contributions

Organization	Description	Date	Amount
Various	Bus Program Donations	Various	7,806
Various	Medical Supplies	Various	1,700
Various	Youth Hunt Program	Various	400
Total cash contributions received			9,906
Non-cash			
Home Depot & Other	Various non-cash donations	Various	200,926
Total non-cash contributions received			200,926
TOTAL			210,832

**Dr. W.C. Swanson Family Foundation, Inc**  
**87-0578540**  
**Form 990-PF - Attachment B**  
**2016**

Part I, Line 6a: Net gain or (loss) from sale of assets not on line 10

Security	Amount	Gain/(Loss)
U.S. Trsy Inflation Note	59,858.50	
U.S. Trsy Inflation Note	(59,858.52)	(0.02)
Call IBM	944.98	944.98
Call CCL	399.99	399.99
Qualcomm Inc	14,399.69	
Qualcomm Inc	(18,900.00)	(4,500.31)
Call Nsc Mar 00092.50	159.99	159.99
Call Dov Mar 00075.00	159.99	159.99
Intl Business Machines	26,999.41	
Intl Business Machines	(30,400.00)	(3,400.59)
Linear Technology Corp	8,899.81	
Linear Technology Corp	(9,200.00)	(300.19)
At&T Inc	17,924.61	
At&T Inc	(17,250.00)	674.61
At&T Inc	17,924.61	
At&T Inc	(17,120.00)	804.61
Procter & Gamble Co	24,224.46	
Procter & Gamble Co	(23,972.97)	251.49
Procter & Gamble Co	16,149.66	
Procter & Gamble Co	(15,966.00)	183.66
3M Company	16,639.63	
3M Company	(16,800.00)	(160.37)
3M Company	16,639.62	
3M Company	(16,500.00)	139.62
3M Company	33,279.30	
3M Company	(32,800.00)	479.30
Vanguard Small Cap Value	6,666.90	
Vanguard Small Cap Value	(6,955.00)	(288.10)
Edison Intl Calif	14,549.68	
Edison Intl Calif	(12,300.00)	2,249.68
Vanguard Reit Etf	17,751.41	
Vanguard Reit Etf	(17,209.31)	542.10
Intl Business Machines	15,858.65	
Intl Business Machines	(15,800.00)	58.65
Metlife Inc Com	7,999.83	

**Dr. W.C. Swanson Family Foundation, Inc**  
**87-0578540**  
**Form 990-PF - Attachment B**  
**2016**

Part I, Line 6a: Net gain or (loss) from sale of assets not on line 10

Security	Amount	Gain/(Loss)
Metlife Inc Com	(10,048.00)	(2,048.17)
Norfolk Southern Corp	17,597.62	
Norfolk Southern Corp	(21,000.00)	(3,402.38)
Sanofi Adr	11,549.75	
Sanofi Adr	(13,827.60)	(2,277.85)
Verizon Communicatns Com	10,599.77	
Verizon Communicatns Com	(10,486.00)	113.77
Wal-Mart Stores Inc	21,599.53	
Wal-Mart Stores Inc	(23,400.00)	(1,800.47)
Carnival Corp Paired Shs	23,249.49	
Carnival Corp Paired Shs	(21,750.00)	1,499.49
C.H. Robinson Worldwide,	21,902.52	
C.H. Robinson Worldwide,	(21,855.00)	47.52
Qualcomm Inc	13,699.70	
Qualcomm Inc	(13,600.00)	99.70
Toronto Dominion Bank	24,634.46	
Toronto Dominion Bank	(20,750.00)	3,884.46
Call Jnj	439.99	439.99
Call Qcom	399.99	399.99
Call Tm	647.99	647.99
Call Intc	349.99	349.99
Call Cat	251.99	251.99
Canadian Pacific Railway	12,999.72	
Canadian Pacific Railway	(18,644.99)	(5,645.27)
Qualcomm Inc	14,399.69	
Qualcomm Inc	(21,525.00)	(7,125.31)
Call Sny	899.98	899.98
Call Bcs	599.99	599.99
Call Rdst	449.99	
Call Rdst	(700.00)	(250.01)
Call Ibm	131.00	
Call Ibm	(128.00)	3.00
Aberdeen Asia-Pac	4,749.90	
Aberdeen Asia-Pac	(7,726.10)	(2,976.20)
Intl Business Machines	13,499.71	



**Dr. W.C. Swanson Family Foundation, Inc**  
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**Form 990-PF - Attachment B**  
**2016**

Part I, Line 6a: Net gain or (loss) from sale of assets not on line 10

Security	Amount	Gain/(Loss)
Intl Business Machines	(15,200.00)	(1,700.29)
Pembina Pipeline	9,999.78	
Pembina Pipeline	(13,600.00)	(3,600.22)
Royal Dutch Shel	10,023.78	
Royal Dutch Shel	(12,800.00)	(2,776.22)
Call Bp	349.99	349.99
Call Fb	269.99	269.99
Baxalta Inc Shs	9,232.79	
Baxalta Inc Shs	(6,409.08)	2,823.71
Baxalta Inc Shs	4,616.39	
Baxalta Inc Shs	(3,128.62)	1,487.77
Dover Corp	14,159.68	
Dover Corp	(13,750.00)	409.68
Dover Corp	14,159.70	
Dover Corp	(13,800.00)	359.70
Dover Corp	7,079.85	
Dover Corp	(6,366.00)	713.85
Nextera Energy Inc Shs	25,099.44	
Nextera Energy Inc Shs	(22,200.00)	2,899.44
Nextera Energy Inc Shs	25,099.46	
Nextera Energy Inc Shs	(20,700.00)	4,399.46
Unitedhealth Group Inc	27,219.39	
Unitedhealth Group Inc	(22,229.98)	4,989.41
Unitedhealth Group Inc	27,219.41	
Unitedhealth Group Inc	(21,742.00)	5,477.41
Unitedhealth Group Inc	27,219.42	
Unitedhealth Group Inc	(23,700.00)	3,519.42
Wal-Mart Stores Inc	28,513.07	
Wal-Mart Stores Inc	(34,800.00)	(6,286.93)
Wal-Mart Stores Inc	14,256.53	
Wal-Mart Stores Inc	(16,580.00)	(2,323.47)
American Wtr Wks Co	15,499.66	
American Wtr Wks Co	(10,850.00)	4,649.66
Vanguard Reit Etf	17,899.61	
Vanguard Reit Etf	(17,409.31)	490.30

**Dr. W.C. Swanson Family Foundation, Inc**  
**87-0578540**  
**Form 990-PF - Attachment B**  
**2016**

Part I, Line 6a: Net gain or (loss) from sale of assets not on line 10

Security	Amount	Gain/(Loss)
Kinder Morgan Inc	9,635.79	
Kinder Morgan Inc	(18,192.33)	(8,556.54)
Kinder Morgan Inc	3,563.92	
Kinder Morgan Inc	(6,844.50)	(3,280.58)
Metlife Inc Com	11,999.74	
Metlife Inc Com	(15,300.00)	(3,300.26)
Siemens Ag	11,327.95	
Siemens Ag	(10,748.60)	579.35
Shire Plc-Adr	8,703.89	
Shire Plc-Adr	(8,361.76)	342.13
Anthem Inc	12,499.74	
Anthem Inc	(15,300.00)	(2,800.26)
Vermilion Energy Inc	6,559.84	
Vermilion Energy Inc	(8,962.00)	(2,402.16)
Vermilion Energy Inc	9,839.80	
Vermilion Energy Inc	(13,350.00)	(3,510.20)
Wal-Mart Stores Inc	7,278.84	
Wal-Mart Stores Inc	(7,240.00)	38.84
Call Mdlz Sep 00048.00	349.99	349.99
Comcast Corp New Cl A	6,533.22	
Comcast Corp New Cl A	(5,850.00)	683.22
Call Tm Oct 00120.00	939.98	939.98
Call Ibm Oct 00165.00	130.99	130.99
Call Ewu Oct 00016.00	164.99	164.99
Intel Corp	14,343.68	
Intel Corp	(14,600.00)	(256.32)
Intel Corp	7,171.83	
Intel Corp	(6,700.00)	471.83
Intel Corp	14,343.71	
Intel Corp	(12,276.00)	2,067.71
Qualcomm Inc	13,179.70	
Qualcomm Inc	(12,600.00)	579.70
Qualcomm Inc	19,769.58	
Qualcomm Inc	(18,300.00)	1,469.58
Qualcomm Inc	13,179.72	

**Dr. W.C. Swanson Family Foundation, Inc**  
**87-0578540**  
**Form 990-PF - Attachment B**  
**2016**

Part I, Line 6a: Net gain or (loss) from sale of assets not on line 10

Security	Amount	Gain/(Loss)
Qualcomm Inc	(12,800.00)	379.72
Kinder Morgan Inc. Del	5,499.88	
Kinder Morgan Inc. Del	(11,000.00)	(5,500.12)
Siemens Ag Adr	11,511.95	
Siemens Ag Adr	(10,748.60)	763.35
Toyota Motor Corp Adr	11,744.74	
Toyota Motor Corp Adr	(12,900.00)	(1,155.26)
Toyota Motor Corp Adr	11,744.75	
Toyota Motor Corp Adr	(13,750.00)	(2,005.25)
Barcla Ys Plc Adr	4,567.90	
Barcla Ys Plc Adr	(5,759.96)	(1,192.06)
Barcla Ys Plc Adr	9,135.80	
Barcla Ys Plc Adr	(11,328.00)	(2,192.20)
Barcla Ys Plc Adr	3,425.93	
Barcla Ys Plc Adr	(4,410.00)	(984.07)
Canadian Pacific Railway	15,199.77	
Canadian Pacific Railway	(18,644.99)	(3,445.22)
!Shares Msci U K Etf Shs	4,649.90	
!Shares Msci U K Etf Shs	(5,537.97)	(888.07)
Kinder Morgan Inc. Del	8,611.85	
Kinder Morgan Inc. Del	(16,752.00)	(8,140.15)
Metlife Inc Com	11,149.76	
Metlife Inc Com	(10,048.00)	1,101.76
Mondelez International	12,374.73	
Mondelez International	(10,800.00)	1,574.73
Select Sector Spdr Tr	13,829.69	
Select Sector Spdr Tr	(12,000.00)	1,829.69
Select Sector Spdr Tr	9,219.79	
Select Sector Spdr Tr	(8,400.00)	819.79
Select Sector Spdr Tr	23,049.51	
Select Sector Spdr Tr	(21,625.00)	1,424.51
Sanofi Adr	7,953.83	
Sanofi Adr	(9,623.21)	(1,669.38)
Total Gain/(Loss)	(37,302.29)	(37,302.29)

**Dr. W.C. Swanson Family Foundation, Inc**  
**87-0578540**  
**Form 990-PF - Attachment B**  
**2016**

Part I, Line 6a: Net gain or (loss) from sale of assets not on line 10

Security	Amount	Gain/(Loss)
Proceeds	1,125,188.11	
Costs	(1,162,490.40)	
Total Gain/(Loss)	(37,302.29)	

**Dr. W.C. Swanson Family Foundation, Inc**  
**87-0578540**  
**Form 990-PF - Attachment C**  
**2016**

Part I, Line 20: Occupancy

	<u>Total</u>	<u>Column b</u>	<u>Column d</u>
Janitorial Cleaning	9,422	9,422	-
Janitorial Supplies	125	125	-
Electricity	2,295	2,295	-
Heating	970	970	-
Water/Sewage	938	938	-
Landscaping/lawn care	49	49	-
Waste Removal	3,521	3,521	-
	<u>17,320</u>	<u>17,320</u>	<u>-</u>

**Dr. W.C. Swanson Family Foundation, Inc**  
**87-0578540**  
**Form 990-PF - Attachment D**  
**2016**

## Tax Asset Detail 1/01/16 - 12/31/16

FYE: 12/31/2016

Asset	t	Property Description	Date In Service	Tax Cost	Sec 179 Exp Current = c	Tax Bonus Amt	Tax Prior Depreciation	Tax Current Depreciation	Tax End Depr	Tax Net Book Value	Tax Method	Tax Period
<b>Group: 140-000 FURN &amp; FIXTURES</b>												
3		CABINET SAFE	7/01/90	530 19	0 00	0 00	530 19	0 00	530 19	0 00	S/L	10 00
4		DICTAPHONE EOT	4/04/95	1,227 00	0 00	0 00	1,227 00	0 00	1,227 00	0 00	S/L	5 00
12		CONFERENCE TABLE	12/12/96	6,580 43	0 00	0 00	6,580 43	0 00	6,580 43	0 00	S/L	7 00
15		DOWN(FURNITURE)	12/31/96	100,000 00	0 00	0 00	100,000 00	0 00	100,000 00	0 00	S/L	10 00
17		OFFICE FURNITURE	7/01/97	143,505 83	0 00	0 00	143,505 83	0 00	143,505 83	0 00	S/L	10 00
32		PRINTER	7/01/97	749 00	0 00	0 00	749 00	0 00	749 00	0 00	S/L	5 00
50		RUGS	7/01/97	10,500 00	0 00	0 00	10,500 00	0 00	10,500 00	0 00	S/L	10 00
52		STORAGE RACKS IN CRAWL	7/01/97	2,030 56	0 00	0 00	2,030 56	0 00	2,030 56	0 00	S/L	10 00
69		SAFE	12/06/99	3,495 84	0 00	0 00	3,495 84	0 00	3,495 84	0 00	S/L	10 00
235		TABLE SAW	9/07/04	547 00	0 00	0 00	547 00	0 00	547 00	0 00	S/L	10 00
263		SAW	11/14/05	1,271 24	0 00	0 00	1,271 24	0 00	1,271 24	0 00	S/L	7 00
300		TEXERE RUG (ISBERIAN)	9/26/06	3,695 00	0 00	0 00	3,695 00	0 00	3,695 00	0 00	S/L	7 00
301		GABBEH RUG (ISBERIAN)	9/26/06	4,400 00	0 00	0 00	4,400 00	0 00	4,400 00	0 00	S/L	7 00
302		TIBETAN RUG (ISBERIAN)	10/17/06	4,400 00	0 00	0 00	4,400 00	0 00	4,400 00	0 00	S/L	7 00
304		EXERCISE EQUIPMENT	12/31/06	1,938 30	0 00	0 00	1,938 30	0 00	1,938 30	0 00	S/L	7 00
337		SNOW PLOW	10/28/08	2,000 00	0 00	0 00	2,000 00	200 00	1,700 00	300 00	S/L	10 00
339		FURITURE	4/24/12	3,599 97	0 00	0 00	3,599 97	360 00	1,620 00	1,979 97	S/L	10 00
343		2 RUGS	7/01/12	2,000 00	0 00	1,000 00	1,250 30	89 30	1,339 60	660 40	200DB	7 0
350		DISHWASHER-BREAKROOM	2/24/15	713 98	0 00	0 00	35 70	71 40	107 10	606 88	S/L	10 00
351		COPIER	3/16/15	4,570 00	0 00	0 00	326 43	652 86	979 29	3,590 71	S/L	7 00
352		SCANNER	3/16/15	1,875 00	0 00	0 00	133 93	267 86	401 79	1,473 21	S/L	7 00
353		FRIDGE	3/31/15	1,456 20	0 00	0 00	72 81	145 62	218 43	1,237 77	S/L	10 00
354		CCTV CAMERAS	3/31/15	432 55	0 00	0 00	21 63	43 26	64 89	367 66	S/L	10 00
355		RECORDER FOR SEC CAM	3/31/15	382 82	0 00	0 00	19 14	38 28	57 42	325 40	S/L	10 00
356		2004 TOYOTA LIFT TRUCK	4/06/15	7,800 00	0 00	0 00	390 00	780 00	1,170 00	6,630 00	S/L	10 00
357		2 COMPUTERS	4/14/15	1,429 98	0 00	0 00	102 14	204 28	306 42	1,123 56	S/L	7 00
358		RACKING FOR WAREHOUSE	4/14/15	3,062 48	0 00	0 00	76 56	153 12	229 68	2,832 80	S/L	20 00
359		2 DESKS	4/14/15	624 98	0 00	0 00	31 25	62 50	93 75	531 23	S/L	10 00
360		ADULT TRANS DESK & STORA	5/11/15	2,059 97	0 00	0 00	103 00	206 00	309 00	1,750 97	S/L	10 00
363		ADULT TRANS DESK	4/23/15	491 98	0 00	245 99	281 14	60 24	341 38	150 60	200DB	7 0
				317,370 30	0 00c	1,245 99	290,474 42	3,334 72	293,809 14	23,561 16		
<b>140-000 FURN &amp; FIXTURES</b>												
<b>Group: 140-001 AUTOMOBILES</b>												
86		PETERBILT 2000	3/22/00	72,952 50	0 00	0 00	72,952 50	0 00	72,952 50	0 00	S/L	5 00
361		2015 TOYOTA TACOMA	8/25/15	34,987 00	0 00	0 00	1,749 35	3,498 70	5,248 05	29,738 95	S/L	10 00
362		RANGER	10/27/15	15,557 92	0 00	0 00	777 90	1,555 79	2,333 69	13,224 23	S/L	10 00
				123,497 42	0 00c	0 00	75,479 75	5,054 49	80,534 24	42,963 18		
<b>140-001 AUTOMOBILES</b>												
<b>Group: 140-002 ART</b>												
87		BOUNTIFUL DAVIS ART	1/01/91	700 00	0 00	0 00	0 00	0 00	0 00	700 00	Memo	0 00
88		ART	2/01/93	2,100 00	0 00	0 00	0 00	0 00	0 00	2,100 00	Memo	0 00
89		ART	2/10/95	3,750 00	0 00	0 00	0 00	0 00	0 00	3,750 00	Memo	0 00
90		PICTURE	5/16/95	75 00	0 00	0 00	0 00	0 00	0 00	75 00	Memo	0 00
91		ART	2/27/96	750 00	0 00	0 00	0 00	0 00	0 00	750 00	Memo	0 00
92		TOM LEEK WATERCOLOR	7/01/97	2,600 00	0 00	0 00	0 00	0 00	0 00	2,600 00	Memo	0 00

## Tax Asset Detail 1/01/16 - 12/31/16

FYE: 12/31/2016

Asset	d t	Property Description	Date In Service	Tax Cost	Sec 179 Exp Current = c	Tax Bonus Amt	Tax Prior Depreciation	Tax Current Depreciation	Tax End Depr	Tax Net Book Value	Tax Method	Tax Period
<b>Group: 140-002 ART (continued)</b>												
93		ERTE BRONZE	7/01/97	6,500 00	0 00	0 00	0 00	0 00	0 00	6,500 00	Memo	0 00
94		ERTE BRONZE	7/01/97	5,000 00	0 00	0 00	0 00	0 00	0 00	5,000 00	Memo	0 00
95		J ECCLES PHOTO	7/01/97	450 00	0 00	0 00	0 00	0 00	0 00	450 00	Memo	0 00
96		PHOTO "CHICKADEE"	7/01/97	150 00	0 00	0 00	0 00	0 00	0 00	150 00	Memo	0 00
97		PHOTO "UTAH SATISFY"	7/01/97	150 00	0 00	0 00	0 00	0 00	0 00	150 00	Memo	0 00
98		BY SCOTT JENSEN	7/01/97	600 00	0 00	0 00	0 00	0 00	0 00	600 00	Memo	0 00
99		2 ERTE SCULPTURE	7/01/97	10,000 00	0 00	0 00	0 00	0 00	0 00	10,000 00	Memo	0 00
100		DAVID JACKSON ART	7/01/97	3,200 00	0 00	0 00	0 00	0 00	0 00	3,200 00	Memo	0 00
101		DAVID JACKSON ART	7/01/97	1,200 00	0 00	0 00	0 00	0 00	0 00	1,200 00	Memo	0 00
103		ERTE SILK SCREEN	7/01/97	3,500 00	0 00	0 00	0 00	0 00	0 00	3,500 00	Memo	0 00
104		ERTE SCULPTURE	7/01/97	6,500 00	0 00	0 00	0 00	0 00	0 00	6,500 00	Memo	0 00
105		PAINTING ECCLES ART	2/22/99	3,750 00	0 00	0 00	0 00	0 00	0 00	3,750 00	Memo	0 00
106		LILLY LAKE PAINTING	3/15/00	1,000 00	0 00	0 00	0 00	0 00	0 00	1,000 00	Memo	0 00
198		ERTE	2/15/01	5,000 00	0 00	0 00	0 00	0 00	0 00	5,000 00	Memo	0 00
199		ERTE	2/15/01	3,500 00	0 00	0 00	0 00	0 00	0 00	3,500 00	Memo	0 00
200		OCHRE STREAM	2/15/01	1,615 00	0 00	0 00	0 00	0 00	0 00	1,615 00	Memo	0 00
221		ART	3/25/02	200 00	0 00	0 00	0 00	0 00	0 00	200 00	Memo	0 00
232		GICLEE DRY FLOWER PRINT	3/18/03	1,400 00	0 00	0 00	0 00	0 00	0 00	1,400 00	Memo	0 00
233		WASTCH FIELDS	3/18/03	3,500 00	0 00	0 00	0 00	0 00	0 00	3,500 00	Memo	0 00
238		PAINTING IN RC	3/08/04	4,050 00	0 00	0 00	0 00	0 00	0 00	4,050 00	Memo	0 00
328		ERTE PAINTING	3/19/07	4,320 00	0 00	0 00	0 00	0 00	0 00	4,320 00	Memo	0 00
<b>140-002 ART</b>				75,560 00	0 00c	0 00	0 00	0 00	0 00	75,560 00		
<b>Group: 148-001 HWY 89 BUILDING</b>												
345		BLDG IMPROVEMENT - HWY 8'	12/31/14	154,000 00	0 00	0 00	17,415 39	3,948 72	21,364 11	132,635 89	S/L	39 0
347		BUILDING COSTS	3/01/15	465,839 95	0 00	0 00	9,456 15	11,944 61	21,400 76	444,439 19	S/L	39 0
348		LAND HYW 89 2454 N	9/25/14	250,000 00	0 00	0 00	0 00	0 00	0 00	250,000 00	Land	0 00
364		Building Improvements	6/30/16	48,844 00	0 00c	0 00	0 00	678 39	678 39	48,165 61	S/L	39 0
<b>148-001 HWY 89 BUILDING</b>				918,683 95	0 00c	0 00	26,871 54	16,571 72	43,443 26	875,240 69		
<b>Group: 149-000 TUFF SHEDS</b>												
349		TUFF SHEDS	5/18/15	12,389 38	0 00	0 00	412 98	825 96	1,238 94	11,150 44	S/L	15 00
<b>149-000 TUFF SHEDS</b>				12,389 38	0 00c	0 00	412 98	825 96	1,238 94	11,150 44		
<b>Grand Total</b>				1,447,501 05	0 00c	1,245 99	393,238 69	25,786 89	419,025 58	1,028,475 47		