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Form **990-PF**

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.

Open to Public Inspection

F	or cal	enda	r year 2016 or ta	ax year beginnin	ıg	, 2016,	, and ending		· · · · · · · · · · · · · · · · · · ·	
~ T								A	Employer identification num	nber
	DALE & ALICE BALLARD CHARITABLE FOUNDATION					1	<u></u>	87-6237645	1	
								В	Telephone number (see inst 800-516-559	ructions)
			SHINGTON BI	ר∧ח				-	800-210-222	
U	احالها	N,	UT 84401					С	If exemption application is	pending, check here
<u>-</u>	Che	ack al	Il that apply.	Initial return		Initial return of a forn	nor public charity	_		
G	Cito	UN G	п пасарріў. І	Final return	}	Amended return	let public charty	D	1 Foreign organizations, chec	k here.
			}	Address char	ŀ	Name change			2 Foreign organizations meet	ting the 85% test, check
급	Chc	-le \$1	== of organizati					1	here and attach computation	on .
п			pe of organization			1(c)(3) exempt private for		_	Ifto formulation atotus	المعلمة والمستحدث والمستحدث
<u>.</u>			ction 4947(a)(1)				orivate foundation	E	If private foundation status under section 507(b)(1)(A)	
ı			t value of all assets if it column (c), line 1			counting method X Ca	ash Accrual		,,,,,,	
	(1101. ► \$	liiaic		•		Other (specify)		F	If the foundation is in a 60	
12		A		,398.	(Part I,	, column (d) must be or	cash basis)	L	under section 507(b)(1)(B)	, check nere
i.	anti		nalysis of Re			(a) Revenue and	(b) Net investmer	nt	(c) Adjusted net	(d) Disbursements
		CC	xpenses (The blumns (b), (c), a	total of amounts	in neces-	expenses per books	income		income	for charitable purposes
		sa	arily equal the ar	nounts in colum	ın (a)		I			(cash basis only)
_			ee instructions)							
	_	1		ts, etc , received (attach sch	-	Control of the Contro	993-24-08-15-15-1	Page 4	989488822098867.44.88	ALCOHOLOGICAL TOP A CONTROL OF THE C
	ļ	2	Check ► X if the four	indation is not required to a	attach Sch B	经基础的 医	ALCAN MALE TO			
		2	interset on sawnes and te	emporary cash investments						
	ŀ	4	Dividends and interest fro	· ·		12,614.	12,61	1	12,614.	
			Gross rents .	in document	-	14,017.	12,01	<u>.4.</u>	14,017.	
			Net rental income of floss			BROWN STANKERS	088849497503 849 853	-300	Land Court of Bullion (1985)	NEWS TOTAL
	R	6 a	Net gain or (loss) from sa	Ol and no ton classe had		9,056.		(8)13		
	E	b	Gross sales price to assets on time ba	ration no 95	652.	See that the about 1	54(1)	1. Jan. 1. Jan	A CONTRACTOR OF THE PARTY OF TH	12.5
9	٧	7 /	assets of time ba	ome (rom Par IV, lin			9,05	- K		100.000.000.00
5	E N U		Het short term capita	tal gain	<i>""</i>				1,819.	
J	Ü	9/	Income modification	15 7 200 - / CO	<i></i> ∦.				1,020.	Part At State (CT 25)
	Ē	10 a	Gross sales less	- 2017 B	//				Mary of Control of the Control of th	edicular and
		/	allowances	1991	<u>/</u>		DY4.5 T.915-8X.9	22		
			allowances Less Obst of Single goods sold			建设建设设施	A Part of the Control			扩展数字数据数
			Gross profit or (loss) (atta	ach schedule) [Money (7 to comp-			3790	SALES MEDITALIS
		11	Other income (attach	h schedule)			C 3 Ff on any angular and a second			3.00
]				
_		12	Total. Add lines 1	through 11	•	21,670.	21,67	0.	14,433.	Electric and an artist of the second
_		13	·	ficers, directors, truste	es, etc	0.				
		14	Other employee sale	-	•					
		15	Pension plans, empl	-	•					
	A		Legal fees (attach so	200	CT 1			_	ļ <u></u>	ļ <u>.</u>
	W.	l	Accounting fees (atta	• • •	ST 1	900.	90	<u> </u>		<u> </u>
_	, ķļ		Other professional fees (a	attach scn)						ļ
O P E R A	S	17	Interest .	see instrs) . ŞEE Ş	тм 2	0.50				
Ř	R	18 19	Taxes (attach schedule)(so Depreciation (attach	· · · · · · · · · · · · · · · · · · ·) I III Z	260.	25	50.	<u> </u>	
A T	: <u>A</u>	15	schedule) and deple							
I N	ij	20	Оссиралсу							Line to the Control of the Control o
N G	Ě	21	Travel, conferences,	, and meetings	٠		<u> </u>			
A N D	E X P	22	Printing and publicat					_		
D	Ŷ	23	Other expenses (atta	•						
	E			SEE STATEME	INT 3	10,256.	10,25	<u> 6, </u>		ļ
	S E S	24	Total operating and expenses. Add lines			11 416	11 47			
	s	25	Contributions, gifts, grants	CIDAL	Ţ4.	11,416. 31,500.	11,41			31,500.
		26	Total expenses and	•	• • •	31,300.		S. S	A CONTRACTOR OF THE STATE OF TH	31,300.
	1	20	Add lines 24 and 25			42,916.	11,41	16.	0.	31,500.
_		27	Subtract line 26 from	n line 12.					Like a regime a com-	
	l	а	Excess of revenue of			04.046				
			and disbursements		٠	-21,246.		1		
	-		Net investment inco		•		10,25		1 4 2 2	
			Adjusted net incom-	e (it negative enter .	·U-7	CODE 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1			11 11 11 11 11	4. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1.



Par	AIII I	Balance Sheets	Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year		nd of			
13074	T :		(See instructions)	(a) Book Value	(b) Book Value	<u>;</u>	(c) Fair I	Market	Value
	1	Cash — non-interest	_	ļ					
	2		ary cash investments .					Markey & 1886	
	3	Accounts receivable	· · · · · · · · · · · · · · · · · · ·						
		Less allowance for	doubtful accounts •					Sala Carlo	
	4	Pledges receivable	: • • • • • • • • • • • • • • • •	TANKE KARA				(1) x 1/2	1 1
	_ ا	Less allowance for	doubtful accounts •						
	5	Grants receivable				\longrightarrow			
	6	Receivables due from office disqualified persons (attack	cers, directors, trustees, and other checkets,			Ì			
A	7	Other notes and loans rec	• •	10 T # 11 7/8 11	A 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	3 336	1.17		2213
		Less: allowance for				AND THE REAL PROPERTY.		222	
S	8	Inventories for sale	or use .		-	$\neg \dagger$			
A S E T	9	Prepaid expenses ar	nd deferred charges .			\neg			
Ś	10	a Investments – U.S obligations (attach s	and state government chedule)						
] (b Investments — corporate	stock (attach schedule)	512,644.	491,3	98.		491,	398.
	,	c Investments — corporate	bonds (attach schedule) .			\neg			
	11	Investments – land, equipment, basis	buildings, and						
		Less: accumulated deprecal (attach schedule)	iation .						
	12	Investments - morto	gage loans						
	13	Investments - other	(attach schedule)						
	14	Land, buildings, and	equipment basis •			\$41		184.HX	400
		Less: accumulated deprect (attach schedule)	iation •						
	1	Other assets (descri							
	16	see the instructions	completed by all filers — Also, see page 1, item l)	512,644.	491,3	98.		491,	398.
Ļ	17	Accounts payable ar	nd accrued expenses						
A B	18	Grants payable	• • •				7 P 🔞		5.4 5
B	19	Deferred revenue					*		
Ļ	20		tors, trustees, & other disqualified persons						
Ť	21	Mortgages and other notes						de T	
Ē	22	Other liabilities (desc	cribe)				10.0		
E S	23	Total liabilities (add		0.	_	0.	i i	ď	
		Foundations that fol and complete lines 2	llow SFAS 117, check here						H
ΝF	24	Unrestricted		<u> </u>					1111
N F E U T N	25	Temporarily restricte	d				eda a	(2. fg)	1113
D	26	Permanently restrict	ed <u>.</u>				<i>1</i>	X 12	111
A B A L T A	i	Foundations that do and complete lines 2	not follow SFAS 117, check here X 27 through 31.			ALCO STATE OF THE		: 3	
EL	27	Capital stock, trust p	rincipal, or current funds .	512,644.	491,3	98.			ii (t
SN	28	Paid-in or capital surplus,	or land, bldg., and equipment fund .					J. H	
O E	29	Retained earnings, accumi	ulated income, endowment, or other funds						1115
RS	30		und balances (see instructions)	512,644.	491,3	98.			
	31	Total liabilities and i (see instructions)	net assets/fund balances	512,644.	491,3	98			
Par	anni		ges in Net Assets or Fund Balanc		101,0	<u> </u>	Section 1	San Complete St.	6 12 30°
	Total	net assets or fund ba	alances at beginning of year - Part II, coli		agree with	\Box			
	end-	of-year figure reported	d on prior year's return).		-	1		512,	
						-21,	<u> 246.</u>		
	3 Other increases not included in line 2 (itemize)								
4		lines 1, 2, and 3	, , , , , , , , , , , , , , , , , , ,		· · / }	4		491,	398.
5 6		ases not included in line 2 (alances at end of year (line 4 minus line 5) Part II column (h)		5		401	200
<u> </u>	iola	THE CASSELS OF TUHO DE	mances at end of year (line 4 minus line 5	y — marcii, columni (b),	mie 30			491,	398.

RantilV Capital Gains and I			765		7->	7.6
(a) List and describe 2-story brick wareh	the kind(s) of property sold (e.g , rouse, or common stock, 200 shares	eal estate, MLC Company)	(b) How acq P — Purch D — Dona	ase	(C) Date acquired (mo, day, yr)	(d) Date sold (mo , day, yr)
1a WELLS FARGO ADVISOR	RS		P		VARIOUS	VARIOUS
b WELLS FARGO ADVISOR	RS		P		VARIOUS	VARIOUS
CAPITAL GAIN DIVIDE	INDS					
d						
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other bas plus expense of sal			(h) Gain or (e) plus (f) m	
a 2,929.			2,910.			19.
b 85,486.			3,686.	_		1,800.
С			, , , , , ,			
d						
<u>e</u>						
	ring gain in column (h) and owned b		69	O:	(1) Gains (Col. ain minus col. (k), b	
(i) F.M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (ı) over col. (ֈ), ıf any			an -0-) or Losses (fr	om col. (h))
a						19.
<u>b</u>						1,800.
c d						7,237.
e						
2 Capital gain net income or (ne	t capital loss) — If gain, also	enter in Part I, line 7 er -0- in Part I, line 7		2		0.056
3 Net short-term capital gain or	(loss) as defined in sections 1222(5		ł			9,056.
If gain, also enter in Part I, line	e 8, column (c) (see instructions). It			-		7 010
In Part I, line 8 Part V Qualification Under	Section 4940(a) for Poduce	d Tay on Not Investm	ont Inco	3	L	1,819.
If section 4940(d)(2) applies, leave the section 4940(d)(2) applies, leave the section of the se	ction 4942 tax on the distributable a lify under section 4940(e). Do not c	omplete this part		ļ?	Yes	X No
	each column for each year, see the ins	structions before making any	entries		(4)	
(a) Base period years Calendar year (or tax year beginning in)	Adjusted qualifying distributions	Net value of noncharitable-use ass	sets	((d) Distribution (col (b) divided	
2015	23,868.	505	5,384.			0.047227
2014	22,383.		5,266.			0.044299
. 2013	34,908.		3,797.			0.071416
2012	1,800.		1,989. 5,951.			0.034623
2011		<u></u>	0,951.			
2 Total of line 1, column (d).			}	2		0.197565
3 Average distribution ratio for the number of years the foundation	ne 5-year base period — divide the f n has been in existence if less than	total on line 2 by 5, or by the 5 years.	ne)	3		0.039513
4 Enter the net value of nonchar	itable-use assets for 2016 from Par	t X, line 5		4		494,491.
5 Multiply line 4 by line 3				5	<u></u>	19,539.
6 Enter 1% of net investment inc	come (1% of Part I, line 27b)		.]	6		103.
7 Add lines 5 and 6				7		19,642.
8 Enter qualifying distributions fr	om Part XII, line 4		. {	8		31,500.
If line 8 is equal to or greater tha Part VI instructions	n line 7, check the box in Part VI, line	1b, and complete that part u	ising a 1%	tax ra	ate See the	

Fai	16VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 — see	instruc	:tions)		
1 a	· L-1		3.		
	Date of ruling or determination letter (attach copy of letter if necessary – see instructions)				
Ŀ	Domestic foundations that meet the section 4940(e) requirements in Part V,	1		1(03.
	check here ► X and enter 1% of Part I, line 27b .	4			
C	: All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col. (b)	10 A 10 A		* ** · · · · · · · · · · · · · · · · ·	Military.
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		10	<u>03.</u>
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4			<u>0.</u>
5	Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-	5	a file of a street	l(03.
6	Credits/Payments.				
	2016 estimated tax pmts and 2015 overpayment credited to 2016 . 6 a Exempt foreign organizations — tax withheld at source . 6 b			134	
				14.77	
	· · · · · · · · · · · · · · · · · · ·			4	i i i
	Backup withholding erroneously withheld Total credits and payments Add lines 6a through 6d	7	**************************************	1.192	41
8	· · · · · · · · · · · · · · · · · · ·	8			0.
9	Enter any penalty for underpayment of estimated tax. Check here	9			03.
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10			03.
11	Enter the amount of line 10 to be Credited to 2017 estimated tax	11			
	WILLIA Statements Regarding Activities				
			7.330	Yes	No
1 a	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?		1 2		X
			<u> </u>	+	
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)?		11	2	Х
	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				
С	Did the foundation file Form 1120-POL for this year?		10		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:				
_	(1) On the foundation \$ 0. (2) On foundation managers. \$		0.		
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$\Boxed{\sigma}\$\$\$\$\$\$ \boxed{\sigma}\$\$\$\$\$\$\$\$				
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?		2	1214:210	X
-	If 'Yes,' attach a detailed description of the activities		2.167	102:49	
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conformed copy of the changes		. 3		<u>X</u> _
4 a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?		4 8	a	Χ_
b	If 'Yes,' has it filed a tax return on Form 990-T for this year?		. 41	oN/.	Α_
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?		. 5		Χ_
	If 'Yes,' attach the statement required by General Instruction T.				
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:			116	
	By language in the governing instrument, or		4.8		
	 By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument? 		6	X	1
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	
	Enter the states to which the foundation reports or with which it is registered (see instructions)		24	115-11	
	N/A				4
b	If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General				
~	(or designate) of each state as required by General Instruction G? If 'No,' attach explanation		81		
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or for calendar year 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? If 'Yes,' complete	4942())(5)		
		e Part	XIV 9	+	<u>X</u>
10	Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses		10		х
BAA				0-PF (20	

r _a	nivities (continued)			
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes,' attach schedule (see instructions)	11	Yes	No X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If 'Yes,' attach statement (see instructions)	12		х
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A	13	X	
1/	The books are in care of ► BANK OF UTAH Telephone no ► 800-5	16-5	EEO	
1-4		10-7	223	
		- NT / 7		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — Check here .	N/F	, -	
	and enter the amount of tax-exempt interest received or accrued during the year			N/A
16	At any time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No X
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If 'Yes,' enter the name of the foreign country			Ž.
Pa	REAL Statements Regarding Activities for Which Form 4720 May Be Required	150 400	To an Server	a yay, sarjege
	File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies.		Yes	No
1	a During the year did the foundation (either directly or indirectly)	4/20/2	100 1,276	10000
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? . Yes X No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a	3		
	disqualified person? Yes X No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes X No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? Yes X No		4	
	(6) Agree to pay money or property to a government official? (Exception. Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) Yes X No			
i	b If any answer is 'Yes' to 1a(1)—(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	1 b	N	/A
	Organizations relying on a current notice regarding disaster assistance check here		957	
(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?	1 c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):			
1	a At the end of tax year 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016? Yes X No			
	If 'Yes,' list the years ► 20 , 20 , 20 , 20			
	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer 'No' and attach statement — see instructions.)	2 b	N	/A
(this provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. 20, 20, 20, 20			
3 8	a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? Yes X No			
J	of 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)	3 b	N	/A
		30	- IN	<u> </u>
4 :	a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4 a		Х
ŀ	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?	46		X
BAA	F	orm 99	0-PF	(2016)

Form 990-PF (2016) DALE & ALICE BALLA	ARD		87-62	37645 Page	e 6
ParttVII:B! Statements Regarding Activit		4720 May Be Reg			_
5 a During the year did the foundation pay or incu			<u> </u>		
(1) Carry on propaganda, or otherwise attempt	-	n (section 4945(e))?	. Yes X	No S	100
(2) Influence the outcome of any specific pub on, directly or indirectly, any voter registra	ilic election (see section	1 4955), or to carry	☐ Yes [X	No	
(3) Provide a grant to an individual for travel,		purposes? .	Yes X	No	A Marie
(4) Provide a grant to an organization other than in section 4945(d)(4)(A)? (see instructions	a charitable, etc., organi s)	zation described	Yes	No	
(5) Provide for any purpose other than religio educational purposes, or for the prevention			Yes	No ,	
b If any answer is 'Yes' to 5a(1)—(5), did any of described in Regulations section 53.4945 or in (see instructions)?	f the transactions fail to a current notice regard	qualify under the exce ding disaster assistance 	ptions :	5 b N/A	
Organizations relying on a current notice rega	irding disaster assistand	ce check here .	► [ř
c If the answer is 'Yes' to question 5a(4), does tax because it maintained expenditure respon	sibility for the grant?	·	N/A. Yes] No	
If 'Yes,' attach the statement required by Reg 6 a Did the foundation, during the year, receive a		• •	S		
on a personal benefit contract? b Did the foundation, during the year, pay prem	iums, directly or indirec	tly, on a personal bene		No 注意 音流 聲	X X
If 'Yes' to 6b, file Form 8870					
7 a At any time during the tax year, was the found	dation a party to a proh	ibited tax shelter transa	oction? . Yes X	No 💮 💮	
b If 'Yes,' did the foundation receive any process	eds or have any net inco	ome attributable to the	transaction ⁷	N/A 7b	
Part VIII Information About Officers, D and Contractors	· · · · · · · · · · · · · · · · · · ·	·		Employees,	
1 List all officers, directors, trustees, foundation	on 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	(e) Expense accourt other allowance	
DALE H_BALLARD PO BOX 1767 DRAPER, UT 84020	FOUND. MGR.	0.	0.		0.
BANK OF UTAH, TRUSTEE	TRUSTEE	0.	0.		0
OGDEN, UT 84401	0				
					_
2 Compensation of five highest-paid employees (or	ther than those included	on line 1 – see instructio		E.'	
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d)Contributions to employee benefit plans and deferred compensation	(e) Expense accourt other allowance	nt, :s
NONE					
					_

Total number of other employees paid over \$50,000 BAA Form 990-PF (2016)

and Contractors (continued)		, ,
3 Five highest-paid independent contractors for professional services (see in		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
		
		-
		<u> </u>
Total number of others receiving over \$50,000 for professional services	<u> </u>	·}C
Rantix A Summary of Direct Charitable Activities		
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical organizations and other beneficiaries served, conferences convened, research papers produced, etc.	al information such as the number of	Expenses
1 N/A		

2		
		•
		ļ
3		
4		
PartilX-B Summary of Program-Related Investments (see instru	ctions)	
Describe the two largest program-related investments made by the foundation during the	e tax year on lines 1 and 2	Amount
1		
		.)
N/A 2		
All other program-related investments. See instructions		
3		
		<u>'</u>
Total. Add lines 1 through 3	-	1
BAA		Form 990-PF (2016)

Form 990-PF (2016) DALE & ALICE BALLARD

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

7	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.	1 a	502,021.
	Average of monthly cash balances	1 b	
	Fair market value of all other assets (see instructions)	1c	
	d Total (add lines 1a, b, and c)	1 d	502,021.
	Reduction claimed for blockage or other factors reported on lines 1a and	6.332	
	1c (attach detailed explanation)		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	502,021.
	Oral day 11 11 () 1 1 1 1 1 1 1 1 1 2 1 1 2 2 2 2 2 2 2		502/021.
4	Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	7,530.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	494,491.
6	Minimum investment return. Enter 5% of line 5	6	24,725.
Pa	☆XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private opera and certain foreign organizations check here ► ☐ and do not complete this part.)	iting f	oundations
- 1	Minimum investment return from Part X, line 6	11	24,725.
2	a Tax on investment income for 2016 from Part VI, line 5	3460	24,123.
	Income tax for 2016. (This does not include the tax from Part VI).	-	
	Add lines 2a and 2b	2 c	103.
3	Distributable amount before adjustments Subtract line 2c from line 1	3	24,622.
4	Recoveries of amounts treated as qualifying distributions	4	24,022.
5	Add lines 3 and 4	5	24,622.
6	Deduction from distributable amount (see instructions)	6	24,022.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	24,622.
	Distributable amount as adjusted. Subtract line o nont line 3. Lines here and off Part Ant, line t	1	24,022.
Pa	Qualifying Distributions (see Instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
	Expenses, contributions, gifts, etc. – total from Part I, column (d), line 26	1 a	31,500.
_ '	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., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
	Suitability test (prior IRS approval required)	3 a	
ı	Cash distribution test (attach the required schedule)	3ь	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	31,500.
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	103.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	31,397.
	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the four qualifies for the section 4940(e) reduction of tax in those years.	ındatıor)

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Form **990-PF** (2016)

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2015	(c) 2015	(d) 2016
1 Distributable amount for 2016 from Part XI, line 7				04 500
2 Undistributed income, if any, as of the end of 2016	Barras Standard			24,622.
a Enter amount for 2015 only			0	
b Total for prior years. 20 , 20 , 20	AND THE STATE A	U 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1		
3 Excess distributions carryover, if any, to 2016:		ivilia distrib		なりまた。ありかは名でかれば あることはよりできるがにこう
a From 2011				
b From 2012				
c From 2013 5, 612.				
d From 2014.				
e From 2015				
f Total of lines 3a through e	5,612.			
4 Qualifying distributions for 2016 from Part				
XII, line 4 ► \$ 31,500.				
a Applied to 2015, but not more than line 2a	Street, Salt		Λ	
b Applied to undistributed income of prior years		V 4440.1 44 44 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4 4		
(Election required – see instructions)		0.		
c Treated as distributions out of corpus	200 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1			
(Election required – see instructions)	0.			
d Applied to 2016 distributable amount				24,622.
e Remaining amount distributed out of corpus	6,878.			24,022.
5 Excess distributions carryover applied to 2016	0.			<u> </u>
(If an amount appears in column (d), the same amount must be shown in column (a))				
Same amount must be shown in column (a)				
6 Enter the net total of each column as				
indicated below:				
a Corpus. Add lines 3f, 4c, and 4e Subtract line 5	12,490.			
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed		0.		Andrew Control of the
Income for which a notice of deficiency has				
been issued, or on which the section 4942(a) tax has been previously assessed		0		
· •		0. \		
d Subtract line 6c from line 6b. Taxable amount — see instructions		0		
		0.		
e Undistributed income for 2015 Subtract line 4a from line 2a. Taxable amount — see instructions			0	
			U. 	
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	Cont. 18 (2) 40 11 2 1 2 1 4 1 4 1 1 1 1 1 1 1 1 1 1 1			0.
corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election	ľ.			
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	12,490.			
10 Analysis of line 9		,,,,,		- 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
a Excess from 2012	» ₍			一直 美国
b Excess from 2013 5, 612.		-		
c Excess from 2014	,	1		
d Excess from 2015	-	,		
e Excess from 2016 6,878.	´ .			
BAA				Form 990-PF (2016)

PartXIV Private Operating Founda		ictions and Par	t VII-A guestion	9)	N/A
1 a If the foundation has received a ruling or dete	ermination letter that				IV/A
is effective for 2016, enter the date of the	ruling		•	· ·	
b Check box to indicate whether the founda2 a Enter the lesser of the adjusted net		rating foundation of		4942(J)(3) or	4942(j)(5)
income from Part I or the minimum investment return from Part X for each year listed	Tax year (a) 2016	(b) 2015	(c) 2014	(d) 2013	(e) Total
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					
 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.		į			į
(1) Value of all assets	ļ	<u> </u>			
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b 'Endowment' alternative test — enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c 'Support' alternative test - enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					
assets at any time during the Information Regarding Foundation Mana a List any managers of the foundation who have close of any tax year (but only if they have DALE H BALLARD	gers: e contributed more th	nan 2% of the total c	ontributions received section 507(d)(2).)	by the foundation bet	fore the
b List any managers of the foundation who own a partnership or other entity) of which the NONE	10% or more of the foundation has a 1	stock of a corporation of a corporation of greater inter	on (or an equally large est.	e portion of the owner	rship of
2 Information Regarding Contribution, Grant, Check here ► X if the foundation only ma requests for funds If the foundation makes g complete items 2a, b, c, and d	akes contributions to ifts, grants, etc. (see	preselected charitab instructions) to indiv	viduals or organization	ns under other condit	
a The name, address, and telephone number o	r e-mail address of tr	ne person to whom a	applications should be	addressed	
b The form in which applications should be	submitted and infor	mation and materia	als they should inclu	de	
c Any submission deadlines.					
d Any restrictions or limitations on awards,	such as by geograp	hical areas, charita	able fields, kinds of i	nstitutions, or other	factors.
BAA	TE	EA0310L 12/16/16		F	Form 990-PF (2016)

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	Purpose of grant or contribution	Amount			
Name and address (home or business)	or substantial contributor	recipient	Contribution				
a Paid during the year							
	1						
		ļ ļ	1				
			İ				
			1				
		'					
		,					
		1					
	II						
			<u> </u>				
Total	 		. ► 3a				
b Approved for future payment							
			1				
	n		1	}			
	li .						
	li						
	· · · · · · · · · · · · · · · · · · ·		L				
Total			► 3b				

Enter gross amounts unless otherwise indicated.		ed business income	Excluded	by section 512, 513, or 514	T
Program service revenue:	(a) Business code	(b) Amount	(c) Exclu- sion	(d) Amount	(e) Related or exempt function income (See instructions)
_	ļ		code		
ab		 	 		
		 	} }		
c		 	 		
d		 	 		
e	 -	 	╂		
Took and contracts from any comment accompany	_	 	 		
g Fees and contracts from government agencies		-			
2 Membership dues and assessments	ļ	ļ	 		
3 Interest on savings and temporary cash investments	ļ	 			
4 Dividends and interest from securities	0.800 to 9000 1 1 200	11 - 1600 00 1 12 12 22 19 - 12 12 24 12 24 24 14 14 14 14 14 14 14 14 14 14 14 14 14	14	12,614.	
 Net rental income or (loss) from real estate a Debt-financed property 	3.2.2.2.2.2.2.2.2.2.2.2.2.2.2.2.2.2.2.2		3		
b Not debt-financed property		L			
6 Net rental income or (loss) from personal property					
7 Other investment income			i		
8 Gain or (loss) from sales of assets other than inventory				7,237.	1,819.
9 Net income or (loss) from special events.					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue		And the second			
a					
b					
С					
d					
e					
12 Subtotal Add columns (b), (d), and (e)			學演了強	19,851.	1,819.
13 Total. Add line 12, columns (b), (d), and (e)				13	21,670.
See worksheet in line 13 instructions to verify calcula-					
Rant XVI-B Relationship of Activities to the	e Accompl	lishment of Exemp	t Purpo	ses	
Explain below how each activity for which accomplishment of the foundation's exemp	income is rep of purposes (o	orted in column (e) of Fother than by providing f	Part XVI-A	contributed important such purposes) (See i	tly to the nstructions.)
N/A					
24) 22					
					
					
					
					
					
				 -	
					
	··				
					
					
					
					
					
					
					
		· · ·			
					
					

Form 990-PF (2016) DALE & ALICE BALLARD 87-6237645 [Part Will Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

describ	e organization directly bed in section 501(c) g to political organiza	of the Code (other	ge in any of the following v than section 501(c)(3) org	vith any oth anizations)	er organization or in section 527,		Yes 1	No
•		4 2 4						
a Transfe	1 - (1)							
(1) Ca	1 a (1)	X						
	her assets				•		1 a (2)	X
	ransactions						31.63	
• •	les of assets to a nor	•	•	•			1 b (1)	X
• •			exempt organization			•	1 b (2)	X
• •	ntal of facilities, equi	•	sets .				1 b (3)	X
• • •	ımbursement arrange			•			1 b (4)	X
• •	ans or loan guarante			•			1 b (5)	X
		•	r fundraising solicitations				1 b (6)	X
C Shann	g or racinities, equipm	iem, maning iisis,	other assets, or paid emplo	yees			1 c	X
d If the a the goo any tra	nswer to any of the a ds, other assets, or se insaction or sharing a	above is 'Yes,' con rvices given by the arrangement, show	nplete the following schedu eporting foundation If the fo in column (d) the value of	le. Column undation rec the goods,	(b) should always eived less than fair other assets, or se	show the fair r market value in ervices receive	narket value of d.	
(a) Line no	(b) Amount involved	(c) Name of no	ncharitable exempt organization	(b)	Description of transfers,	transactions, and	sharing arrangemer	nts
N/A	· · · · · · · · · · · · · · · · · · ·							
					- - -			
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	_ 		 					
		<u> </u>						
								
								
		<u> </u>						
describ	oundation directly or in led in section 501(c) complete the follow	of the Code (other	h, or related to, one or more than section 501(c)(3)) or	tax-exempt on section 5	organizations 327?		Yes X]No
	Name of organizat	_ 	(b) Type of organization		(a) Day	scription of rela	ationship	
N/A	a) Ivallie of organizat	1011	(b) Type of organization	''	(C) De:	scription of rea	ations(iip	
N/A								
								
								
								
Under	nenalise of person 1 decla	that I have evanued	his return, including accompanying	had selebedas	statements, and to the hi	est of my knowledge	a and belief it is true	
Sign correc	t, and complete Declaration	of preparer (other than	laxpayer) is based on all information	of which prepa	arer has any knowledge	ost of my knowledge	May the IRS disc this return with t	cuss the
Here Z	rull The	works	- 4/13/17	TF TF	RUSTEE		preparer shown (see instructions	
Sign	ature of officer or trustee		Date	Title			X Yes	No
	Print/Type preparer's na	me	Preparer's signature	Ilm	Date	Check If	PTIN	
Paid	HOKAN OLAUS	SON CPA	HOKAN OLAUSSON	CPA	3/28/17	self-employed	P00082326	i
Preparer	Firm's name	SKIDMORE & O	LAUSSON PLLC		Firm'	s EIN ► 20-8	959260_	
Use Only		301 N 500 W						
	· · · · · · · · · · · · · · · · · · ·		Т 84010		Phon	e no (801) 951-8900)
BAA							Form 990-PF	

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FEDERAL STATEMENTS

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DALE & ALICE BALLARD CHARITABLE FOUNDATION

87-6237645

STATEMENT 1					
FORM 990-PF,	PART	1, [INE	1	6B
ACCOUNTING		•			

		(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PROFESSIONAL FEES	TOTAL	\$ 900. \$ 900.	\$ 900. \$ 900.	\$ 0.	\$ 0.

STATEMENT 2 FORM 990-PF, PART I, LINE 18 **TAXES**

		(A) EXPENSES PER BOOKS		(B) NET INVESTMENT INCOME		(C) ADJUSTED NET INCOME		(D) CHARITABLE PURPOSES	
FOREIGN TAX	TOTAL	\$	260. 260.	\$	260. 260.	\$	0.	\$	0.

STATEMENT 3 FORM 990-PF, PART I, LINE 23 OTHER EXPENSES

			 (A) EXPENSES PER BOOKS	 (B) NET IVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ADMINISTRATION ADVISORY FEES	FEES	TOTAL	\$ 5,680. 4,576. 10,256.	\$ 5,680. 4,576. 10,256.	\$ 0.	\$ 0.

STATEMENT 4 FORM 990-PF, PART I, LINE 25 CONTRIBUTIONS, GIFTS, AND GRANTS

CASH GRANTS AND ALLOCATIONS

DONEE'S NAME: DONEE'S ADDRESS:

350.ORG

20 JAY ST STE 1010

BROOKLYN NY 11201

RELATIONSHIP OF DONEE:

ORGANIZATIONAL STATUS OF DONEE:

NONE

AMOUNT GIVEN:

CHARITY

CHARITABLE CONTRIBUTION

CLASS OF ACTIVITY: DONEE'S NAME:

COMMON GROUND 35 N 100 E

DONEE'S ADDRESS:

LOGAN UT 84321

RELATIONSHIP OF DONEE: AMOUNT GIVEN:

NONE

1,000.

6,000.

CLASS OF ACTIVITY:

CHARITABLE CONTRIBUTION FIGHT THE NEW DRUG

DONEE'S NAME:

2016

FEDERAL STATEMENTS

PAGE 2

DALE & ALICE BALLARD CHARITABLE FOUNDATION

87-6237645

500.

3,000.

4,000.

STATEMENT 4 (CONTINUED) FORM 990-PF, PART I, LINE 25 CONTRIBUTIONS, GIFTS, AND GRANTS

DONEE'S ADDRESS:

367 W 1600 S SLC UT 84115

RELATIONSHIP OF DONEE:

NONE

AMOUNT GIVEN:

CHARITABLE CONTRIBUTION

MALALA FUND

CLASS OF ACTIVITY: DONEE'S NAME: DONEE'S ADDRESS: 1201 CONNECTICUT AVE NW STE 300

WASHINGTON DC 20036

RELATIONSHIP OF DONEE: NONE AMOUNT GIVEN:

CLASS OF ACTIVITY: CHARITABLE CONTRIBUTION

DONEE'S NAME: OPERATION SMILE INC DONEE'S ADDRESS: 3641 FACULTY BLVD VIRGINIA BEACH VA 23453

RELATIONSHIP OF DONEE:

NONE CHARITY

ORGANIZATIONAL STATUS OF DONEE:

AMOUNT GIVEN: 4,000.

CLASS OF ACTIVITY: CHARITABLE CONTRIBUTION

DONEE'S NAME: DONEE'S ADDRESS: UTAH PHYSICIANS FOR A HELATHY ENVIRONMEN 1064 E ELGIN AVE

SLC UT 84106

RELATIONSHIP OF DONEE: NONE

6,000. AMOUNT GIVEN:

CLASS OF ACTIVITY: CHARITABLE CONTRIBUTION

DONEE'S NAME: BEST FRIENDS ANIMAL SOCIETY

ORGANIZATIONAL STATUS OF DONEE: CHARITY AMOUNT GIVEN: 1,000.

CHARITABLE CONTRIBUTION

CLASS OF ACTIVITY: DONEE'S NAME: HOMELESS VETERANS FELLOWSHIP

RELATIONSHIP OF DONEE: NONE ORGANIZATIONAL STATUS OF DONEE: CHARITY

AMOUNT GIVEN: 3,000.

CLASS OF ACTIVITY: CHARITABLE CONTRIBUTION

DONEE'S NAME: THE NATURE CONSERVANCY

RELATIONSHIP OF DONEE: NONE ORGANIZATIONAL STATUS OF DONEE: CHARITY

AMOUNT GIVEN: 3,000.

CLASS OF ACTIVITY: CHARITABLE CONTRIBUTION

DONEE'S NAME: UTAH OPEN LANDS

RELATIONSHIP OF DONEE:
ORGANIZATIONAL STATUS OF DONEE:
CHARITY AMOUNT GIVEN:

TOTAL \$ 31,500.