EXTENDED TO NOVEMBER 15, 2017

Form 990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

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

OMB No 1545-0052

2016

Open to Public Inspection

For calendar year 2016 or tax year beginning , and ending

Name of foundation: THE RENAISSANCE FOUNDATION

A Employer identification number: 93-1306116

Number and street (or P O box number if mail is not delivered to street address): P.O. BOX 80516 | Room/suite:

B Telephone number: 503-726-5970

City or town, state or province, country, and ZIP or foreign postal code: PORTLAND, OR 97280

C If exemption application is pending, check here ▶ ☐

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

D 1. Foreign organizations, check here ▶ ☐

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

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

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

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶$ 12,927,971.

J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) (Part I, column (d) must be on cash basis.)

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

Part I Analysis of Revenue and Expenses

(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)

Section	Line	Description	(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			N/A	
	2	Check ▶ ☒ if the foundation is not required to attach Sch B				
	3	Interest on savings and temporary cash investments	264.	264.		STATEMENT 1
	4	Dividends and interest from securities	199,831.	199,831.		STATEMENT 2
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	388,686.			
	b	Gross sales price for all assets on line 6a 2,636,980.				
	7	Capital gain net income (from Part IV, line 2)		388,686.		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss)				
	11	Other income				
	12	**Total.** Add lines 1 through 11	588,781.	588,781.		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	0.	0.		0.
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees				
	b	Accounting fees STMT 3	8,225.	4,112.		4,113.
	c	Other professional fees				
	17	Interest				
	18	Taxes STMT 4	13,765.	551.		0.
	19	Depreciation and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses STMT 5	67,007.	66,301.		0.
	24	**Total operating and administrative expenses.** Add lines 13 through 23	88,997.	70,964.		4,113.
	25	Contributions, gifts, grants paid	817,281.			817,281.
	26	**Total expenses and disbursements.** Add lines 24 and 25	906,278.	70,964.		821,394.
	27	Subtract line 26 from line 12:				
	a	Excess of revenue over expenses and disbursements	-317,497.			
	b	**Net investment income** (if negative, enter -0-)		517,817.		
	c	**Adjusted net income** (if negative, enter -0-)			N/A	

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623501 11-23-16 LHA For Paperwork Reduction Act Notice, see instructions. Form 990-PF (2016)

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Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only

			Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing			
	2	Savings and temporary cash investments	2,116,480.	259,626.	259,626.
	3	Accounts receivable ▶ Less: allowance for doubtful accounts ▶			
	4	Pledges receivable ▶ Less: allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons			
	7	Other notes and loans receivable ▶ Less: allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments - U.S. and state government obligations			
	b	Investments - corporate stock STMT 6	6,137,505.	5,171,160.	7,861,769.
	c	Investments - corporate bonds STMT 7	405,995.	3,421,583.	3,403,674.
	11	Investments - land, buildings, and equipment basis ▶ Less accumulated depreciation ▶			
	12	Investments - mortgage loans			
	13	Investments - other STMT 8	1,784,233.	1,274,347.	1,402,902.
	14	Land, buildings, and equipment: basis ▶ Less accumulated depreciation ▶			
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers - see the instructions. Also, see page 1, item I)	10,444,213.	10,126,716.	12,927,971.
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable			
	22	Other liabilities (describe ▶)			
	23	**Total liabilities** (add lines 17 through 22)	0.	0.	
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here ▶ [X] and complete lines 24 through 26 and lines 30 and 31**			
	24	Unrestricted	10,444,213.	10,126,716.	
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ [ ] and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg., and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	**Total net assets or fund balances**	10,444,213.	10,126,716.	
	31	**Total liabilities and net assets/fund balances**	10,444,213.	10,126,716.	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	10,444,213.
2	Enter amount from Part I, line 27a	2	-317,497.
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	10,126,716.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	10,126,716.

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	3000 SH CEB INC	P	02/08/11	01/06/16
b	2500 SH AKAMAI TECHNOLOGIES INC	P	08/05/15	01/06/16
c	12343.09 SH BVDIX	P	06/03/09	01/12/16
d	12000 SH GENPACT LTD	P	12/23/10	02/12/16
e	0.40 SH DENTSPLY SIRONA INC	P	07/11/13	03/10/16
f	4000 SH WILLIAMS SONOMA INC	P	01/11/13	04/22/16
g	1500 SH PERRIGO CO PLC	P	12/19/13	04/27/16
h	8600 SH SUNCOR ENERGY INC	P	11/25/03	05/05/16
i	3000 SH CERNER CORP	P	04/23/15	05/05/16
j	800 SH AFFILIATED MANAGERS GROUP	P	08/06/15	06/14/16
k	500 SH EQUIFAX INC	P	06/26/13	08/23/16
l	800 SH APPLE INC	P	10/13/08	08/23/16
m	5150.657 SH DODFX	P	07/25/14	10/05/16
n	2000 SH IDEXX LABORATORIES INC	P	07/11/13	12/09/16
o	8000 SH BIGIX	P	07/29/03	12/09/16

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	172,722.		117,639.	55,083.
b	126,705.		190,838.	-64,133.
c	197,119.		111,470.	85,649.
d	297,434.		194,217.	103,217.
e	24.		15.	9.
f	236,611.		197,322.	39,289.
g	145,856.		228,308.	-82,452.
h	220,452.		186,498.	33,954.
i	166,643.		219,339.	-52,696.
j	123,129.		167,732.	-44,603.
k	65,741.		29,345.	36,396.
l	87,230.		11,846.	75,384.
m	200,000.		241,875.	-41,875.
n	236,331.		93,422.	142,909.
o	200,000.		127,309.	72,691.

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a				55,083.
b				-64,133.
c				85,649.
d				103,217.
e				9.
f				39,289.
g				-82,452.
h				33,954.
i				-52,696.
j				-44,603.
k				36,396.
l				75,384.
m				-41,875.
n				142,909.
o				72,691.

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 / If (loss), enter "-0-" in Part I, line 7 }	2	
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8	3	

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04-01-16

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	2000 SH MEDNAX INC	P	10/08/14	12/15/16
b	UNITUS SEED FUND K-1	P	VARIOUS	VARIOUS
c	UNITUS SEED FUND K-1	P	VARIOUS	VARIOUS
d	OAKTREE PRIV INVEST FUND 2010 K-1	P	VARIOUS	VARIOUS
e	OAKTREE PRIV INVEST FUND 2010 K-1	P	VARIOUS	VARIOUS
f	OAKTREE PRIV INVEST FUND 2010 K-1	P	VARIOUS	VARIOUS
g	OAKTREE PRIV INVEST FUND 2010 K-1	P	VARIOUS	VARIOUS
h	OAKTREE K-1 SEC 1231	P	VARIOUS	VARIOUS
i	CAPITAL GAINS DIVIDENDS			
j				
k				
l				
m				
n				
o				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	130,113.		130,953.	-840.
b			166.	-166.
c	104.			104.
d	82.			82.
e	21,584.			21,584.
f	2,602.			2,602.
g	1,734.			1,734.
h	1,774.			1,774.
i	2,990.			2,990.
j				
k				
l				
m				
n				
o				

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a				-840.
b				-166.
c				104.
d				82.
e				21,584.
f				2,602.
g				1,734.
h				1,774.
i				2,990.
j				
k				
l				
m				
n				
o				

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 / If (loss), enter "-0-" in Part I, line 7 }	2	388,686.
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8	3	N/A

623591
04-01-16

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a				
b	SEE ATTACHED STATEMENTS			
c				
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a				
b				
c				
d				
e	2,636,980.		2,248,294.	388,686.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a				
b				
c				
d				
e				388,686.

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7; If (loss), enter -0- in Part I, line 7 } — 2 — 388,686.

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8 — 3 — N/A

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2015	791,951.	14,601,202.	.054239
2014	781,184.	14,944,752.	.052271
2013	637,781.	13,834,837.	.046100
2012	588,293.	12,462,060.	.047207
2011	507,648.	12,371,537.	.041034

2	**Total** of line 1, column (d)	2	.240851
3	Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.048170
4	Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	13,223,886.
5	Multiply line 4 by line 3	5	636,995.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	5,178.
7	Add lines 5 and 6	7	642,173.
8	Enter qualifying distributions from Part XII, line 4	8	821,394.

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

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

1a Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter: ______ (attach copy of letter if necessary-see instructions)				
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ [X] and enter 1% of Part I, line 27b			1	5,178.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).				
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			2	0.
3 Add lines 1 and 2			3	5,178.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			4	0.
5 **Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-			5	5,178.
6 Credits/Payments:				
a 2016 estimated tax payments and 2015 overpayment credited to 2016	6a	10,150.		
b Exempt foreign organizations - tax withheld at source	6b			
c Tax paid with application for extension of time to file (Form 8868)	6c	12,000.		
d Backup withholding erroneously withheld	6d			
7 Total credits and payments. Add lines 6a through 6d			7	22,150.
8 Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached			8	
9 **Tax due** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶			9	
10 **Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶			10	16,972.
11 Enter the amount of line 10 to be: **Credited to 2017 estimated tax** ▶		16,972. **Refunded** ▶	11	0.

Part VII-A Statements Regarding Activities

		Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)?	1b		X
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.			
c Did the foundation file **Form 1120-POL** for this year?	1c		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ $ 0. (2) On foundation managers. ▶ $ 0.			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ 0.			
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities*	2		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		X
4a Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b If "Yes," has it filed a tax return on **Form 990-T** for this year? N/A	4b		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6		X
7 Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col (c), and Part XV*	7	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ OR			
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*	8b	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? *If "Yes," complete Part XIV*	9		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

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

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ WWW.TRFWEBSITE.ORG

14 The books are in care of ▶ IRVING J. LEVIN Telephone no. ▶ 503-726-5970
Located at ▶ 5200 SW MEADOWS ROAD, SUITE 150, LAKE OSWEGO, OR ZIP+4 ▶ 97035

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** - Check here ▶ ☐
and enter the amount of tax-exempt interest received or accrued during the year ▶ 15 N/A

			Yes	No
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		X
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ▶			

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

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

				Yes	No
1a	During the year did the foundation (either directly or indirectly):				
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception**. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	N/A	1b		
	Organizations relying on a current notice regarding disaster assistance check here	▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2016?		1c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):				
a	At the end of tax year 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016?	☐ Yes ☒ No			
	If "Yes," list the years ▶ ______, ______, ______, ______				
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement - see instructions.)	N/A	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ ______, ______, ______, ______				
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2016 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969; **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2016.)*	N/A	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2016?		4b		X

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

5a During the year did the foundation pay or incur any amount to:				
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes ☒ No			
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	☐ Yes ☒ No			
(3) Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes ☒ No			
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions)	☐ Yes ☒ No			
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes ☒ No			
b If any answer is "Yes" to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?	N/A	5b		
Organizations relying on a current notice regarding disaster assistance check here	▶ ☐			
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? N/A	☐ Yes ☐ No			
If "Yes," attach the statement required by Regulations section 53 4945-5(d)				
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes ☒ No			
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		6b		X
If "Yes" to 6b, file Form 8870.				
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes ☒ No			
b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	N/A	7b		

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
IRVING J. LEVIN 5200 SW MEADOWS RD, SUITE 150 LAKE OSWEGO, OR 97035	TRUSTEE 1.00	0.	0.	0.
STEPHANIE J. FOWLER 5200 SW MEADOWS RD, SUITE 150 LAKE OSWEGO, OR 97035	TRUSTEE 0.00	0.	0.	0.
DIANA HOFF 5200 SW MEADOWS RD, SUITE 150 LAKE OSWEGO, OR 97035	MANAGER 1.00	0.	0.	0.

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

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

Total number of other employees paid over $50,000 ▶ 0

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

3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

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

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

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 N/A	
2	
3	
4	

Part IX-B **Summary of Program-Related Investments**

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:			
a	Average monthly fair market value of securities		1a	12,273,657.
b	Average of monthly cash balances		1b	769,511.
c	Fair market value of all other assets		1c	382,097.
d	**Total** (add lines 1a, b, and c)		1d	13,425,265.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e 0.		
2	Acquisition indebtedness applicable to line 1 assets		2	0.
3	Subtract line 2 from line 1d		3	13,425,265.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)		4	201,379.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4		5	13,223,886.
6	**Minimum investment return.** Enter 5% of line 5		6	661,194.

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ▶ ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6		1	661,194.
2a	Tax on investment income for 2016 from Part VI, line 5	2a 5,178.		
b	Income tax for 2016. (This does not include the tax from Part VI.)	2b		
c	Add lines 2a and 2b		2c	5,178.
3	Distributable amount before adjustments. Subtract line 2c from line 1		3	656,016.
4	Recoveries of amounts treated as qualifying distributions		4	0.
5	Add lines 3 and 4		5	656,016.
6	Deduction from distributable amount (see instructions)		6	0.
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1		7	656,016.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	821,394.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions** Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	821,394.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	5,178.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	816,216.

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2015	(c) 2015	(d) 2016
1 Distributable amount for 2016 from Part XI, line 7				656,016.
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only			499,354.	
b Total for prior years: ____ , ____ , ____		0.		
3 Excess distributions carryover, if any, to 2016:				
a From 2011				
b From 2012				
c From 2013				
d From 2014				
e From 2015				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2016 from Part XII, line 4: ▶ $ 821,394.				
a Applied to 2015, but not more than line 2a			499,354.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2016 distributable amount				322,040.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2015. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2016. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2017				333,976.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2011 not applied on line 5 or line 7	0.			
9 **Excess distributions carryover to 2017.** Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2012				
b Excess from 2013				
c Excess from 2014				
d Excess from 2015				
e Excess from 2016				

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

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

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

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

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

1 **Information Regarding Foundation Managers:**

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

IRVING J. LEVIN

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

NONE

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

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

a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed: SEE STATEMENT 10

SEE STATEMENT 9

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

c Any submission deadlines:

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

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
AMERICAN JEWISH WORLD SERVICE 45 WEST 36TH ST NEW YORK, NY 10018	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	10,000.
AMNESTY INTERNATIONAL 5 PENN PLAZA - 14TH FLOOR NEW YORK, NY 10001	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	3,000.
ARTIST REPERTORY THEATRE 1515 SW MORRISON ST PORTLAND, OR 97205	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	50,000.
BLACK PARENT INITIATIVE 2915 NE MARTIN LUTHER KING BLVD PORTLAND, OR 97212	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	5,000.
BLANCHET HOUSE 310 NW GLISAN ST PORTLAND, OR 97209	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	2,000.
Total SEE CONTINUATION SHEET(S)			▶ 3a	817,281.
b Approved for future payment NONE				
Total			▶ 3b	0.

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
CALDERA 224 NW 13TH AVE, STE 304 PORTLAND, OR 97209	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	5,500.
CEDAR SINAI PARK 6125 SW BOUNDARY ST PORTLAND, OR 97221	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	25,000.
CHESS FOR SUCCESS 2701 NW VAUGHN ST, SUITE 101 PORTLAND, OR 97210	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	15,000.
CHICAGO CANINE RESCUE 5272 N ELSTON AVE CHICAGO, IL 60630	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	1,000.
COLLEGE POSSIBLE 532 SE GRAND AVE PORTLAND, OR 97214	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	10,000.
CORBAN UNIVERSITY 5000 DEER PARK DR SE SALEM, OR 97317	NONE	PUBLIC CHARITY	SCHOLARSHIPS	6,500.
DE LA SALLE HIGH SCHOOL 7528 FENWICK AVE PORTLAND, OR 97217	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	10,000.
DEPAUL TREATMENT CENTERS P.O. BOX 3007 PORTLAND, OR 97208	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	3,000.
DIGITAL DIVIDE DATA 115 W 30TH ST., SUITE 400 NEW YORK, NY 10001	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	20,000.
DOCTORS WITHOUT BORDERS P.O. BOX 5030 HAGERSTOWN, MD 21741	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	5,000.
Total from continuation sheets				747,281.

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
DRESS FOR SUCCESS 1532 NE 37TH ST PORTLAND, OR 97232	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	2,000.
EARTHJUSTICE 426 17TH ST, 6TH FL OAKLAND, CA 94612	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	5,000.
FAIRWARNING, INC. 17514 VENTURA BLVD SUITE 103 ENCINO, CA 91316	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	10,000.
FORTIS COLLEGE 555 E ALEX BELL RD CENTERVILLE, OH 45459	NONE	PUBLIC CHARITY	SCHOLARSHIPS	6,000.
FOUNDATIONS FOR A BETTER OREGON 221 NW 2ND AVE, #210E PORTLAND, OR 97209	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	10,000.
GOOD SAMARITAN FOUNDATION 3600 NW SAMARITAN DRIVE CORVALLIS, OR 97330	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	5,000.
HEIFER INTERNATIONAL P.O. BOX 8058 LITTLE ROCK, AR 72203	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	5,000.
HIAS 1300 SPRING ST, STE 500 SILVER SPRING, MD 20910	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	5,000.
JEWISH FEDERATION 6651 SW CAPITOL HWY PORTLAND, OR 97219	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	25,000.
JEWISH THEATRE COLLABORATIVE 2510 SE 51ST PORTLAND, OR 97206	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	1,500.
Total from continuation sheets				

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
KNOX COLLEGE 2 E SOUTH ST GALESBURG, IL 61401	NONE	PUBLIC CHARITY	SCHOLARSHIPS	3,000.
LEWIS & CLARK COLLEGE 615 SW PALATINE HILL RD PORTLAND, OR 97219	NONE	PUBLIC CHARITY	SCHOLARSHIPS	130,000.
LINN-BENTON COMMUNITY COLLEGE 6500 PACIFIC BLVD SW ALBANY, OR 97321	NONE	PUBLIC CHARITY	SCHOLARSHIPS	2,500.
LITERARY ARTS 925 SW WASHINGTON ST PORTLAND, OR 97321	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	500.
MARYLHURST UNIVERSITY 17600 PACIFIC HIGHWAY MARYLHURST, OR 97036	NONE	PUBLIC CHARITY	SCHOLARSHIPS	6,000.
MAZON 10495 SANTA MONICA BLVD LOS ANGELES, CA 90025	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	3,000.
MILLS COLLEGE 5000 MACARTHER BLVD OAKLAND, CA 94613	NONE	PUBLIC CHARITY	SCHOLARSHIPS	2,500.
MITTLEMAN JEWISH COMMUNITY CENTER 6651 SW CAPITOL HWY PORTLAND, OR 97219	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	3,000.
NATIONAL TRUST FOR HISTORIC PRESERVATION 1785 MASSACHUSETTS AVE, NW WASHINGTON, DC 20036	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	5,000.
NATURE CONSERVANCY 821 SE 14TH AVE PORTLAND, OR 97214	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	5,000.
Total from continuation sheets				

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
NEW ISRAEL FUND 1101 14TH ST NW, 6TH FLOOR WASHINGTON, DC 20005	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	7,000.
OMSI 1945 SE WATER ST PORTLAND, OR 97214	NONE	PUBLIC CHARITY	SCHOLARSHIPS	10,000.
OREGON BRAVO YOUTH ORCHESTRA PO BOX 17356 PORTLAND, OR 97217	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	20,000.
OREGON CHILDREN'S FOUNDATION 101 SW MARKET ST PORTLAND, OR 97201	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	10,000.
OREGON ENTREPENEUR'S NETWORK 309 SW 6TH AVE PORTLAND, OR 97204	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	1,000.
OREGON FOOD BANK P.O. BOX 55370 PORTLAND, OR 97238	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	10,000.
OREGON HUMANE SOCIETY 1067 NE COLUMBIA BLVD PORTLAND, OR 97211	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	1,000.
OUTWARD BOUND CENTER FOR PEACEBUILDING 29-46 NORTHER BLVD LONG ISLAND CITY, NY 11101	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	5,000.
OXFAM AMERICA P.O. BOX 1211 ALBERT LEA, MN 56007	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	5,000.
PACIFIC UNIVERSITY 2043 COLLEGE WAY FOREST GROVE, OR 97116	NONE	PUBLIC CHARITY	SCHOLARSHIPS	9,000.
Total from continuation sheets				

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
PORTLAND ART MUSEUM 1219 SW PARK AVE PORTLAND, OR 97205	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	10,000.
PORTLAND COMMUNITY COLLEGE FOUNDATION P.O. BOX 19000 PORTLAND, OR 97280	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	15,000.
PORTLAND COMMUNITY COLLEGE FOUNDATION P.O. BOX 19000 PORTLAND, OR 97280	NONE	PUBLIC CHARITY	SCHOLARSHIPS AND MENTORING PROGRAM	43,281.
PORTLAND RESCUE MISSION P.O. BOX 3713 PORTLAND, OR 97208	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	2,000.
PSU FOUNDATION P.O. BOX 751 PORTLAND, OR 97207	NONE	PUBLIC CHARITY	SCHOLARSHIPS	134,000.
READING RESULTS 3115 NE SANDY BLVD, STE 299 PORTLAND, OR 97232	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	25,000.
ROSEMARY ANDERSON HIGH SCHOOL 717 N KILLINGSORTH CT PORTLAND, OR 97217	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	15,000.
SAN FRANCISCO BOTANICAL GARDEN SOCIETY 1199 NINTH AVENUE AT LINCOLN WAY SAN FRANCISCO, CA 94122	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	5,000.
SEATTLE UNIVERSITY 901 12TH AVE SEATTLE, WA 98122	NONE	PUBLIC CHARITY	SCHOLARSHIPS	2,500.
SOCIAL VENTURE PARTNERS PORTLAND 308 SW 1ST AVE #158 PORTLAND, OR 97204	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	20,000.
Total from continuation sheets				

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
STAND FOR CHILDREN 516 SE MORRISON ST., SUITE 410 PORTLAND, OR 97214	NONE	PUBLIC CHARITY	SCHOLARSHIPS	15,000.
STANFORD HEALTH CARE PARTNERS P.O. BOX 20466 STANFORD, CA 94309	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	1,000.
SUSAN G KOMEN FOUNDATION 1500 SW 5TH AVE, STE 270 PORTLAND, OR 97201	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	5,000.
THE CHILDREN'S INSTITUTE 1411 SW MORRISON ST, STE 205 PORTLAND, OR 97205	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	10,000.
THE COLONIAL WILLIAMSBURG FOUNDATION P.O. BOX 1776 WILLIAMSBURG, VA 23187	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	1,000.
THE HARPSWELL FOUNDATION P.O. BOX 163 CONCORD, MA 01742	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	10,000.
UNION OF CONCERNED SCIENTISTS TWO BRATTLE SQUARE CAMBRIDGE, MA 02138	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	3,000.
UNIVERSITY OF OREGON 1585 E 13TH AVE EUGENE, OR 97403	NONE	PUBLIC CHARITY	SCHOLARSHIPS	3,000.
WESTERN OREGON UNIVERSITY 345 MONMOUTH AVE N MONMOUTH, OR 97361	NONE	PUBLIC CHARITY	SCHOLARSHIPS	5,500.
WILLIAM TEMPLE HOUSE 2023 NW HOYT ST PORTLAND, OR 97209	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	2,000.
Total from continuation sheets				

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
WORLD AFFAIRS COUNCIL 1200 18TH ST NW, STE 902 WASHINGTON, DC, DC 20036	NONE	PUBLIC CHARITY	GENERAL OPERATING PURPOSES	1,000.
YOUNG ENTREPRENEURS BUSINESS PROGRAMS 1149 COURT STREET NE SALEM, OR 97301	NONE	PUBLIC CHARITY	SCHOLARSHIPS	5,000.
Total from continuation sheets				

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Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	264.	
4 Dividends and interest from securities			14	199,831.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	388,686.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0.		588,781.	0.

13 **Total.** Add line 12, columns (b), (d), and (e) 13 588,781.

(See worksheet in line 13 instructions to verify calculations.)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes).

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

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of:			
	(1) Cash	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
		N/A	

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

b If "Yes," complete the following schedule.

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

Sign Here

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

Signature of officer or trustee: [signature] Date: 11/13/17 Title: TRUSTEE

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

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☒ if self-employed	PTIN
DAVID DERNBACH	[signature]	11/4/17		P00447709

Firm's name ▶ DERNBACH & ASSOCIATES, PLLC — Firm's EIN ▶ 81-2937423

Firm's address ▶ 2025 FIRST AVE, STE 730
SEATTLE, WA 98121 — Phone no. 206-508-2280

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
KEY BANK	264.	264.	
TOTAL TO PART I, LINE 3	264.	264.	

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME
OAKTREE PRIVATE INVESTMENT FUND 2010	22,923.	0.	22,923.	22,923.	
UNITUS FUND	5.	0.	5.	5.	
WILLIAM BLAIR & CO.	179,893.	2,990.	176,903.	176,903.	
TO PART I, LINE 4	202,821.	2,990.	199,831.	199,831.	

FORM 990-PF ACCOUNTING FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAX PREPARATION FEES	8,225.	4,112.		4,113.
TO FORM 990-PF, PG 1, LN 16B	8,225.	4,112.		4,113.

FORM 990-PF — TAXES — STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
OREGON DEPT OF JUSTICE	1,214.	0.		0.
FOREIGN INCOME TAX	551.	551.		0.
FEDERAL INCOME TAX	12,000.	0.		0.
TO FORM 990-PF, PG 1, LN 18	13,765.	551.		0.

FORM 990-PF — OTHER EXPENSES — STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MISCELLANEOUS	706.	0.		0.
ADVISORY FEES	57,243.	57,243.		0.
OAKTREE PRIVATE INVESTMENT FUND	7,558.	7,558.		0.
UNITUS FUND INVESTMENT FEES	1,500.	1,500.		0.
TO FORM 990-PF, PG 1, LN 23	67,007.	66,301.		0.

FORM 990-PF — CORPORATE STOCK — STATEMENT 6

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE STOCKS - WEF-008963 (SEE ATTACHED)	5,171,160.	7,861,769.
TOTAL TO FORM 990-PF, PART II, LINE 10B	5,171,160.	7,861,769.

FORM 990-PF CORPORATE BONDS STATEMENT 7

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE BONDS - WEF-008963 (SEE ATTACHED)	3,421,583.	3,403,674.
TOTAL TO FORM 990-PF, PART II, LINE 10C	3,421,583.	3,403,674.

FORM 990-PF OTHER INVESTMENTS STATEMENT 8

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
EQUITY MUTUAL FUNDS - WEF-008963 (SEE ATTACHED)	COST	879,659.	1,008,214.
OAKTREE PRIVATE INVESTMENT FUND 2010, LP	COST	358,176.	358,176.
UNITUS SEED FUND, LP	COST	36,512.	36,512.
TOTAL TO FORM 990-PF, PART II, LINE 13		1,274,347.	1,402,902.

FORM 990-PF GRANT APPLICATION SUBMISSION INFORMATION STATEMENT 9
PART XV, LINES 2A THROUGH 2D

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

THE RENAISSANCE FOUNDATION
P.O. BOX 80516
PORTLAND, OR 97280

FORM AND CONTENT OF APPLICATIONS

CONCISE WRITTEN PROPOSALS INCLUDING:

*DESCRIPTION OF THE PROJECT/PROGRAM FOR WHICH SUPPORT IS BEING REQUESTED INCLUDING THE NUMBER AND THE NATURE OF THE INTENDED BENEFICIARIES.
*ANTICIPATED OUTCOMES OF THE PROJECT/PROGRAM.
*DETAILS REGARDING HOW THE RECIPIENT ORGANIZATION IMPACTS ITS COMMUNITY/CONSITITUENCY.
*A BRIEF PROJECT/PROGRAM BUDGET INCLUDING THE AMOUNT BEING REQUESTED.
*NAME, TITLE, AND EMAIL ADDRESS OF THE PRINCIPAL CONTACT.
*A ROSTER OF THE BOARD OF DIRECTORS.
*A NARRATIVE (NO MORE THAN 3 PAGES) DESCRIBING THE ORGANIZATION'S HISTORY AND ACHIEVEMENTS.
*AN OPERATING AND PROJECT BUDGET IDENTIFYING THE PROGRAM OR PROJECT'S

ANY SUBMISSION DEADLINES

RESTRICTIONS AND LIMITATIONS ON AWARDS

REQUESTS FOR CAPITAL EXPENSES OR CONTRIBUTIONS TO CAPITAL CAMPAIGNS ARE GENERALLY NOT CONSIDERED.

FORM 990-PF GRANT APPLICATION SUBMISSION INFORMATION PART XV, LINES 2A - 2D (CONTINUATION) STATEMENT 10

FORM AND CONTENT OF APPLICATIONS

INCOME AND EXPENSES OF ITS FISCAL YEAR WITH MOST RECENT AUDITED FINANCIAL STATEMENTS.
*A COPY OF THE LETTER OF TAX EXEMPTION FROM THE INTERNAL REVENUE SERVICE.
*COPIES OF RECENT RELEVANT ARTICLES OR OTHER PUBLICITY ABOUT THE PROGRAM OR ORGANIZATION.

THE RENAISSANCE FOUNDATION					
EIN: 93-1306166					
ATTACHMENT TO 2016 FORM 990-PF					
Page 2, Part II (Balance Sheets) Line 10b, 10c, 13					
			Beg of Year	End of Year	
Description	Security Type	Valuation Code	Book Value	Book Value	Fair Market Value
ABBVIE INC (DUE 5/14/21) 2.3%	CORPORATE BOND	COST	-	300,969	293,937
ANHEUSER-BUSCH (DUE 2/1/21) 2.65%	CORPORATE BOND	COST	-	200,168	201,150
AUTODESK INC (DUE 12/15/22) 3.6%	CORPORATE BOND	COST	-	204,026	200,434
BALL CORPORATION (DUE 12/15/2020) 4 375%	CORPORATE BOND	COST	203,125	203,125	209,000
DOLLAR GENERAL (DUE 4/15/23) 3.25%	CORPORATE BOND	COST	-	146,165	148,025
ECOLAB INC (DUE 1/12/18) 1 55%	CORPORATE BOND	COST	-	199,596	200,226
JUNIPER NETWORKS (DUE 2/26/19) 3.13%	CORPORATE BOND	COST	-	200,298	203,194
LABORATORY CORP OF AMERICA (DUE 11/1/2023) 4 0%	CORPORATE BOND	COST	202,870	202,870	204,908
O'REILLY AUTOMOT (DUE 3/15/16) 3.55%	CORPORATE BOND	COST	-	200,924	198,692
QUEST DIAGNOSTIC (DUE 3/30/20) 2.5%	CORPORATE BOND	COST	-	198,758	199,860
STRYKER CORP (DUE 3/15/21) 2.63%	CORPORATE BOND	COST	-	201,190	200,772
UNITRIN INC (DUE 5/15/17) 6 0%	CORPORATE BOND	COST	-	415,350	405,916
VALMONT INDS (DUE 4/20/20) 6.63%	CORPORATE BOND	COST	-	111,846	110,746
VISA INC (DUE 12/14/22) 2.8%	CORPORATE BOND	COST	-	202,366	201,120
WESTERN UNION (DUE 4/1/20) 5.25%	CORPORATE BOND	COST	-	217,210	214,166
ZIMMER HLDGS (DUE 11/30/19) 4.63%	CORPORATE BOND	COST	-	216,722	211,528
TOTAL	CORPORATE BOND		405,995	3,421,583	3,403,674
WILLIAM BLAIR FUNDS INTERNAT GROWTH FUND	EQUITY MUTUAL FUND	COST	439,815	321,534	511,168
WILLIAM BLAIR EM S/C GR-I	EQUITY MUTUAL FUND	COST	300,000	300,000	287,622
DODGE & COX INTL STOCK FUND	EQUITY MUTUAL FUND	COST	500,000	258,125	209,424
WILLIAM BLAIR SMALL CAP VALUE FUND CLASS I	EQUITY MUTUAL FUND	COST	111,470	-	-
TOTAL	EQUITY MUTUAL FUND	COST	1,351,285	879,659	1,008,214
AIRGAS, INC	CORPORATE STOCK	COST	-	-	-
ADOBE SYSTEMS INC	CORPORATE STOCK	COST	228,540	228,540	308,850
AFFILIATED MANAGERS GROUP INC	CORPORATE STOCK	COST	167,732	-	-
AKAMAI TECHNOLOGIES INC	CORPORATE STOCK	COST	190,838	-	-
ALIGN TECHNOLOGY INC	CORPORATE STOCK	COST	140,328	140,328	264,358
AMETEK, INC.	CORPORATE STOCK	COST	222,557	222,557	255,150
APPLE INC.	CORPORATE STOCK	COST	42,683	30,837	231,640
AXALTA COATING SYSTEMS LTD	CORPORATE STOCK	COST	-	157,127	152,320
BRISTOL-MEYERS SQUIBB CO	CORPORATE STOCK	COST	234,027	234,027	257,136
BWX TECHNOLOGIES INC	CORPORATE STOCK	COST	-	165,090	166,740
CERNER CORP	CORPORATE STOCK	COST	219,339	-	-
COLGATE PALMOLIVE, CO	CORPORATE STOCK	COST	137,381	137,381	307,568
CORPORATE EXECUTIVE BOARD CO	CORPORATE STOCK	COST	117,639	-	-
COSTCO WHOLESALE CORP	CORPORATE STOCK	COST	192,335	192,335	288,198
ECOLAB, INC.	CORPORATE STOCK	COST	120,047	120,047	351,660
EOG RESOURCES INC.	CORPORATE STOCK	COST	149,095	149,095	424,620
EQUIFAX INC.	CORPORATE STOCK	COST	176,071	146,726	295,575
FORTIVE CORP	CORPORATE STOCK	COST	-	161,988	160,890
GENPACT LTD	CORPORATE STOCK	COST	194,217	-	-
GILEAD SCIENCES INC.	CORPORATE STOCK	COST	89,313	89,313	358,050
GUIDEWARE SOFTWARE INC	CORPORATE STOCK	COST	125,348	125,348	128,258
IDEXX LABORATORIES INC.	CORPORATE STOCK	COST	323,720	230,298	586,350
J2 GLOBAL INC	CORPORATE STOCK	COST	-	65,537	81,800
MASTERCARD INC -CLASS A	CORPORATE STOCK	COST	194,655	194,655	309,750
MEDNAX INC	CORPORATE STOCK	COST	130,953	-	-
PERRIGO CO PLC	CORPORATE STOCK	COST	228,308	-	-

THE RENAISSANCE FOUNDATION					
EIN: 93-1306166					
ATTACHMENT TO 2016 FORM 990-PF					
Page 2, Part II (Balance Sheets) Line 10b, 10c, 13					
			Beg of Year	End of Year	
Description	Security Type	Valuation Code	Book Value	Book Value	Fair Market Value
RED HAT, INC.	CORPORATE STOCK	COST	167,508	282,858	278,800
ROCKWELL COLLINS INC	CORPORATE STOCK	COST	296,380	296,380	278,280
SALESFORCE.COM INC	CORPORATE STOCK	COST	-	136,037	136,920
SCHLUMBERGER LTD	CORPORATE STOCK	COST	129,250	129,250	260,245
DENTSPLY SIRONA INC F/K/A SIRONA DENTAL SYSTEMS INC	CORPORATE STOCK	COST	136,138	136,123	209,444
STERICYCLE INC	CORPORATE STOCK	COST	146,461	146,461	154,080
SUNCOR ENERGY INC.	CORPORATE STOCK	COST	186,498	-	-
TRACTOR SUPPLY COMPANY	CORPORATE STOCK	COST	139,471	139,471	303,240
UNION PACIFIC CORP	CORPORATE STOCK	COST	138,762	138,762	155,520
UNITED PARCEL SERVICE - CL B	CORPORATE STOCK	COST	103,152	103,152	229,280
VERISK ANALYTICS INC-CL A	CORPORATE STOCK	COST	304,381	304,381	397,733
VF CORP (VFC)	CORPORATE STOCK	COST	258,037	258,037	218,735
WILLIAMS SONOMA INC.	CORPORATE STOCK	COST	197,322	-	-
WORKDAY INC - CL A	CORPORATE STOCK	COST	122,893	122,893	99,135
ZOETIS INC - CL A	CORPORATE STOCK	COST	186,126	186,126	211,444
TOTAL	CORPORATE STOCK	COST	6,137,505	5,171,160	7,861,769
OAKTREE PRIVATE INVESTMENT FUND 2010, LP	OTHER INVESTMENT	COST	393,804	358,176	358,176
UNITUS SEED FUND, LP	OTHER INVESTMENT	COST	39,144	36,512	36,512
	GRAND TOTALS		8,327,733	9,867,090	12,668,345