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

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

OMB No 1545-0052

For	cal	endar	year 2016 or tax year begin	ning	, 2016	and ending		,	
							Α	Employer identification nun	nber
			ITUTE FOR SPIRITU	AL RESE	CARCH INC	1	<u> </u>	94-2898927	
			3516				В	Telephone number (see insti	
SE	וסמי	NA,	AZ 86340-3516				<u> </u>	(928) 282-544	<u>, b</u>
							С	If exemption application is	pending, check here 🕨 🗌
G	Che	ck all	that apply Initial retui	'n	Initial return of a form	ner public charity	D	1 Foreign organizations, chec	k horo
			Final retur	n [Amended return	•		i roreign organizations, chec	v uete
			Address cl	nange [Name change		1	2 Foreign organizations meet	ing the 85% test, check
H	Che	ck typ	e of organization:	ection 50	1(c)(3) exempt private f	oundation	1	here and attach computation	n • 📗
	ſ		ion 4947(a)(1) nonexempt (orivate foundation	E	If private foundation status	was terminated
ī	Fair		value of all assets at end of year		counting method X C		1	under section 507(b)(1)(A)	
			column (c), line 16)		Other (specify)		F	If the foundation is in a 60	month termination
í	> \$		2,771,757.	(Part I	, column (d) must be or	cash basis)	"	under section 507(b)(1)(B)	
Pa	rt I	An	alysis of Revenue and				<u> </u>		
-		Ex	penses (The total of amour	nts ın	(a) Revenue and expenses per books	(b) Net investmer income	11	(c) Adjusted net income	(d) Disbursements for charitable
		coli	imns (b), (c), and (d) may i	not neces-					purposes
1			ly equal the amounts in col e instructions))	umn (a)				1	(cash basis only)
	Ţ.		Contributions, gifts, grants, etc., received (attack	schedule)	444,596.		—	 	
	ě		Check ► I if the foundation is not require	-				 	
	~		we consider to the response	TO ULLUOIT CONT D					
	~		nterest on savings and temporary cash investm	ents	341.		11.	341.	
	6	1 -	Dividends and interest from securities		38,931.	38,93	31.	38,931.	
	2		Gross rents						
	=	ָ טוני	Net rental income or (loss)						
!	? (let gain or (loss) from sale of assets not on lin		8,012.				
- - 	C LIBER		Gross sales price for all 92	4,189.					
- (Z		Capital gain net încome (from Part IV	, line 2).		8,01	.2.		
!			Net short term capital gain.	*					
. }	نې ز پ		ncome modifications Gross sales less						
•	V	,	ciums and	1	-	1		(
			allowances. Less Cost of	- 10 ; -				 	
			goods sold	- _/	* * * 7				
			iross profit or (loss) (attach schedule)	/ -		·		<u> </u>	
		11 (Other income (attach schedule)			<u>;</u>]	
		١,, .						 	
	_		Total. Add lines 1 through 11		491,880.	47,28	34.	39,272.	
			Compensation of officers, directors, to Other employee salaries and wages	ustees, etc	0.			 	
			Pension plans, employee benefits.					 	
			egal fees (attach schedule).		 -			 	
	A			e St 1	1 100			 	
	M		Other professional fees (attach sch) Se		1,100.	26 17	-	 	
0	Ň		nterest	~ ~ ~	26,143.	26,14	13.		
OPERAT	S			Stm 3				ļ	
Ŗ	Ŕ		Depreciation (attach	Q CIII Q	3,722.				
Ť	A		schedule) and depletion See	Stmt 4	6,283.	I			
N G	٧	20	Occupancy		2,984.				
G	Ė	21 1	Fravel, conferences, and meetings						
A N D	E X P		Printing and publications						
Ď	P.	23	Other expenses (attach schedule)						
	E N		See State	ment 5	5,166.			<u> </u>	
	SES		Total operating and administrative		45 222		. ~		
	S		expenses Add lines 13 through 23 contributions, gifts, grants paid St	mt 6	45,398.	26,14	٤٤.	[14 554
	ı		,,,,,,	····	14,550.			 	14,550.
			Total expenses and disbursements Add lines 24 and 25		59,948.	26,14	13	0.	14,550.
			Subtract line 26 from line 12		33,340.	20,14	٠٠.	 -	14,550.
	Ì		Excess of revenue over expenses					,	
		a	and disbursements		431,932.	<u></u>		<u> </u>	<u></u>
		ри	let investment income (if negative, e	enter -0-)		21,14	11.		
		C A	Adjusted net income (if negative, en	er -0-)	L			39,272.	

Add lines 1, 2, and 3

Decreases not included in line 2 (itemize)

Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30

2,782,630

782,630

4

5

6

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shares MLC Company) (b) How P - Pu D - Do						(C) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1 a	1a SEE ATTACHED WELLS FARGO P						Various
b							
							
d							
е	(e) Gross sales price	(f) Depreciation allowed	(g) Cost or other ba			(h) Gain or	(loss)
		(or allowable)	plus expense of sa			(e) plus (f) m	
a			91	6,177.	-		8,012.
					 		
d							
е							
		ing gain in column (h) and owned				(I) 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 (j), ıf any			an -0-) or Losses (fr	
a							8,012.
b							
e					<u> </u>		
		Elf gain, also	enter in Part I, line 7			[
2	Capital gain net income or (ne	-	o enter in Part I, line 7 hter -0- in Part I, line 7	_	2		8,012.
3	. •	(loss) as defined in sections 1222(· ` ` ¬				
	If gain, also enter in Part I, line in Part I, line 8	e 8, column (c) (see instructions)	If (loss), enter -0-	-	3_	 -	0
Par	t V Qualification Under	r Section 4940(e) for Reduce	ed Tax on Net Investn	nent Inc	ome		
Was It 'Ye	s,' the foundation does not qua	ction 4942 tax on the distributable a	complete this part.	<u>. </u>	d [?]	Yes	No
		each column for each year, see the in		entries	_		
	(a) Base period years Calendar year (or tax year beginning in)	Adjusted qualifying distributions	(c) Net value of noncharitable-use as	sets		(d) Distributior (col (b) divided	
	2015						
	2014						
	2013				<u> </u>		
	2012						
	2011	<u> </u>	<u> </u>		 	T	
2	Total of line 1, column (d)				2		
. 3		ne 5-year base period — divide the n has been in existence if less than		the	3		
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5					4		
5	Multiply line 4 by line 3				5	<u> </u> 	
6	Enter 1% of net investment inc	come (1% of Part I, line 27b)			6		
7	Add lines 5 and 6				7	<u> </u>	
8	8 Enter qualifying distributions from Part XII, line 4					<u></u>	
	If line 8 is equal to or greater tha Part VI instructions.	in line 7, check the box in Part VI, line	e 1b, and complete that part	using a 1%	tax r	rate See the	

	1999-1 (2010) THE INSTITUTE FOR SPIRITUAL RESEARCH INC 94-2898927			age 4
	TVI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 – see instruction	15)		
1 8	a Exempt operating foundations described in section 4940(d)(2), check here			
	Date of ruling or determination letter (attach copy of letter if necessary – see instructions)			400
•	Domestic foundations that meet the section 4940(e) requirements in Part V,			<u> 123.</u>
	check here. ► and enter 1% of Part I, line 27b			
•	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-)			<u>0.</u>
3	Add lines 1 and 2			<u> 123.</u>
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			<u>0.</u>
5	Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-			<u> 423.</u>
6	Credits/Payments			
	a 2016 estimated tax pmts and 2015 overpayment credited to 2016			
1	Exempt foreign organizations – tax withheld at source			,
•	Tax paid with application for extension of time to file (Form 8868)			t
_	d Backup withholding erroneously withheld	-		
7	Total credits and payments Add lines 6a through 6d			8 <u>48.</u>
8	Enter any penalty for underpayment of estimated tax. Check here If Form 2220 is attached			
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			0.
10	Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			<u>425.</u>
11	Enter the amount of line 10 to be. Credited to 2017 estimated tax 425. Refunded 11			0.
Pai	t VII-A Statements Regarding Activities			T
1 a	a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it	-	Yes	No
	participate or intervene in any political campaign?	1 a		X
ı	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes	١		l
	(see Instructions for the definition)?	16	L	X
	If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and copies of any materials published	1		ļ
	or distributed by the foundation in connection with the activities			. '
	Did the foundation file Form 1120-POL for this year? I Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year	1 c	<u> </u>	X
,	(1) On the foundation \Rightarrow \$ 0. (2) On foundation managers \Rightarrow \$	İ		
	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on	1		
	foundation managers. •\$0.			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		X
	If 'Yes,' attach a detailed description of the activities			
· [‡] 3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles	1		
J	of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conformed copy of the changes	3		X
4 8	a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		X
ı	olf 'Yes,' has it filed a tax return on Form 990-T for this year?	4 b	N	/A
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		Х
	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			
	By language in the governing instrument, or	1		
	By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict	1]
	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	Х	
8 8	Enter the states to which the foundation reports or with which it is registered (see instructions)			Π
	AZ	1]	
i	of the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General	1 .	1	1
1	(or designate) of each state as required by General Instruction G ² If 'No,' attach explanation	8 b	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(i)(3) or 4942(i)(5)	_	[
	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	<u>L</u> _	X
10	Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names	1	İ	
-	and addresses	10	1	X X
BAA	k Pi	orm 99	U-PF (ZU16)

Par	t VII-A	Statements Regarding Activities (continued)			
11	At any ti within th	me during the year, did the foundation, directly or indirectly, own a controlled entity e meaning of section 512(b)(13)? If 'Yes,' attach schedule (see instructions)	11	Yes	No X
12	Did the fo	oundation make a distribution to a donor advised fund over which the foundation or a disqualified person had privileges? If 'Yes,' attach statement (see instructions)	12		x
13		oundation comply with the public inspection requirements for its annual returns and exemption application?	13	Х	
14	Website	address ► N/A Telephone no ►	. _		
1-7	Located				. – – – - – – -
15		4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — Check here by the amount of tax-exempt interest received or accrued during the year	N/A	!	
16		me during calendar year 2016, did the foundation have an interest in or a signature or other authority over a		Yes	N/A No
	bank, se	curities, or other financial account in a foreign country?	16		X
		instructions for exceptions and filing requirements for FinCEN Form 114. If 'Yes,' name of the foreign country			;
Par	t VII-B	Statements Regarding Activities for Which Form 4720 May Be Required		•	
	File Form	n 4720 if any item is checked in the 'Yes' column, unless an exception applies.		Yes	No
1 a	During th	ne year did the foundation (either directly or indirectly).			1
	(1) Enga	age in the sale or exchange, or leasing of property with a disqualified person?.	o	[
	(2) Borr disqi	ow money from, lend money to, or otherwise extend credit to (or accept it from) a ualified person?	5		
	(3) Furn	ish goods, services, or facilities to (or accept them from) a disqualified person? $\qquad \qquad \qquad \qquad \ \ \ \ \ \ \ \ \ \ \ \ \ $	o		,
	(4) Pay	compensation to, or pay or reimburse the expenses of, a disqualified person? \square Yes \square N	o		
	(5) Tran for the	sfer any income or assets to a disqualified person (or make any of either available he benefit or use of a disqualified person)?	D		
	(6) Agree found of go	te to pay money or property to a government official? (Exception. Check 'No' if the dation agreed to make a grant to or to employ the official for a period after termination overnment service, if terminating within 90 days).	.	_	
' - E	If any ar Regulation	nswer is 'Yes' to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in ons section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	1 6	N	ľΑ
	Organiza	ations relying on a current notice regarding disaster assistance check here			
ď	Did the f	oundation engage in a prior year in any of the acts described in 1a, other than excepted acts, e not corrected before the first day of the tax year beginning in 2016?	10		X
2	Taxes or private of	n failure to distribute income (section 4942) (does not apply for years the foundation was a operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the er and 6e, l	nd of tax year 2016, did the foundation have any undistributed income (lines 6d Part XIII) for tax year(s) beginning before 2016?	0		
	If 'Yes,'	list the years ► 20 , 20 , 20			
t	Are there	e any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2)			
	(relating all years	to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to listed, answer 'No' and attach statement — see instructions)	2 b		ľΑ
c	-	ovisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here			
	▶ 20	, 20 , 20 , 20	1		
3 a	Did the f	foundation hold more than a 2% direct or indirect interest in any business se at any time during the year? Yes X N			'
	a If 'Vas ' .	did it have excess business holdings in 2016 as a result of (1) any purchase by the foundation	\		١ ,
•	or disqua by the C (3) the la	alified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved ommissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or ipse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to		,,	1/3
_		ne if the foundation had excess business holdings in 2016)	31	<u> </u>	I/A
4 a		oundation invest during the year any amount in a manner that would jeopardize its e purposes?	4 a	1	Х
t	Did the f	oundation make any investment in a prior year (but after December 31, 1969) that could			
		e its charitable purpose that had not been removed from jeopardy before the first day of rear beginning in 2016?	41		X
BAA			Form 9		

Part VIII Statements Regarding Activities for Which Form 4720 May Be Required (continued)	Form 990-PF (2016) THE INSTITUTE FOR			94-289	8927	Page 6
(d) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? (d) Influence the outcome of ray spenific public aledom (see section 4955), or to carry on, directly or indirectly, any voter registration drive? (d) Provide a grant to an individual for travel, study, or other similar purposes? (d) Provide a grant to an individual for travel, study, or other similar purposes? (d) Provide a grant to an individual for travel, study, or other similar purposes? (d) Provide a grant to an individual for travel, study, or other similar purposes? (d) Provide a grant to an individual for travel, study, or other similar purposes? (e) Provide a grant to an individual for travel, study, or other similar purposes? (e) Provide a grant to an individual for travel, study, or other similar purposes? (e) Provide a grant to an individual for travel, study, or other similar purposes? (e) Provide a grant to an individual for travel, study, or other similar purposes? (e) Provide a grant to an individual for travel, study, or other similar purposes? (e) Provide a grant to an individual for travel, study, or other similar purposes? (e) If any similar for the student for the similar purposes. (e) If the answer is Yes' to question 53 4945 or in a current indice regarding disaster assistance. (e) If the answer is Yes' to question 53494 or in a current indice regarding disaster assistance. (e) If the similar purposes of the student individual for the student individual f			4720 May Be Req	uired (continued)		
(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any valver registration drive? (3) Provide a grant to an individual for travel, study, or other similar purposes? (4) Provide a grant to an individual for travel, study, or other similar purposes? (5) Provide for any purpose other than religious, charitable, scientific, literary, or executional purposes, or for the pervention of cruelty to chicken or animals? (6) Provide for any purpose other than religious, charitable, scientific, literary, or executional purposes, or for the pervention of cruelty to chicken or animals? (6) Provide for any purpose other than religious, charitable, scientific, literary, or executional purposes, or for the prevention of cruelty to chicken or animals? (7) From the state of the scientific of the prevention of cruelty to chicken or animals? (8) Provide for any purpose other than religious, charitable, scientific, literary, or executional purposes, or for the prevention of cruelty chicken or samples of the scientific of the purpose of control of the scientific of the purpose of the scientific of the scientific of the scientific of the scientific of the purpose of the scientific of th		•				Ì
on, directly or indirectly, any voter registration drive? (3) Provide a grant to an individual for trivel, study, or other similar purposes? (4) Provide a grant to an individual for trivel, study, or other similar purposes? (5) Provide a grant to an individual for trivel, study, or other similar purposes? (6) Provide a grant to an individual for trivel, study, or other similar purposes. (7) Provide for any purpose other than religious, charidable, etc. organization described in section 4954(0)(4/6); dea study of the transactions fall to quality under the exceptions described in Regulations section 33 4946 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here (a) If the answer is "set to question 5a(4), does the foundation claim exemption from the tax because it maintained spenditure responsibility for the grant? If "Yes," affact the statement required by Regulations section 53 4945—5(3) So Did the foundation, during the year, exerce vary funds, directly or indirectly, to pay premiums but the foundation, during the year, set year, was the foundation a party to a prohibited tax striller transaction? If "Yes," did the foundation receive any proceeds or have any net noome attributable to the transaction? If yes," did the foundation receive any proceeds or have any net noome attributable to the transaction? I start officers, directors, frustees, foundation an party to a prohibited tax striller transaction? I start officers, directors, frustees, foundation managers and their compensation (see instructions). (8) Name and address (9) Name and address (9) Title, and everage (c) Compensation (see instructions). (9) Expense account, other strillers, and deferred compensation of the highest-paid employees (other than those included on line 1 – see instructions). If none, enter NONE: (9) Title, and everage paid more than \$50,000 (1) Title, and everage controllers. (1) Title, and everage controllers. (2	(1) Carry on propaganda, or otherwise attempt	ot to influence legislatio	n (section 4945(e))?	∐ Yes X	No	ļ
(c) Proude for any purpose other than religious, chartable, scie, organization described in section 4945(d)(4)(4)(4)(4)(4)(4)(4)(4)(4)(4)(4)(4)(4)	(2) Influence the outcome of any specific pub on, directly or indirectly, any voter registra	lic election (see section ation drive?	4955), or to carry	Yes X	No	
in section 4945(c)(4)(A) (see instructions) (S) Promotific far any purposes other than religious, charitable, scentific, literary, or educational purposes, or for the prevention of cruelty to children or animals? b) If any anyense is Yes' to Sa(1)—(5), and any of the transactions fall to qualify under the evidence of the productions? Organizations relying on a current notice regarding disaster assistance case instructions? Organizations relying on a current notice regarding disaster assistance check here c) If the answer is Yes' to question 55(4), does the foundation claim exemption from the tas because it maintained expenditure responsibility for the grant? If Yes, atlach the statement required by Regulations seation 55 4945—5(0) to pay premiums on a personal benefit contract? If Yes, atlach the statement required by Regulations seation 55 49455—5(0) to pay premiums on a personal benefit contract? If Yes, atlach the statement required by Regulations seation 55 49455—5(0) to pay premiums on a personal benefit contract? If Yes, atlach the statement required by Regulations seation 55 49455—5(0) to pay premiums on a personal benefit contract? If Yes, atlach the statement required by Regulations assistance the statement of the statement o	,,	•		Yes X	No	
educational purposes, or for the prevention of cruelly to children or animals? Yes No			zation described	Yes X	No	
Comparison relying on a current notice regarding disaster assistance check here				Yes X	No	
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? 6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? b Did the foundation, during the year, pay premiums, directly or indirectly, to pay premiums on a personal benefit contract? b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? 7a At any time during the tax year, was the foundation a party to a prohibited tax sheller transaction? 7yes No	b If any answer is 'Yes' to 5a(1)—(5), did any of described in Regulations section 53 4945 or in (see instructions)?	the transactions fail to a a current notice regard	qualify under the excel ding disaster assistance	ptions :	5 b	N/A_
tix because it maintained expenditure responsibility for the grant? If 'Yes,' altach the statement required by Regulations section 53 4945–5(0) 6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? bid the foundation, during the year, receive any funds, directly or indirectly, on a personal benefit contract? bid the foundation during the year, pay premiums, directly or indirectly, on a personal benefit contract? 7a At any time during the tax year, was the foundation a party to a prohibited tax sheller transaction? 7a At any time during the tax year, was the foundation a party to a prohibited tax sheller transaction? 7b Yes \(\text{No} \) 8b It 'Yes,' did the foundation receive any proceeds or have any net income attributable to the transaction? 7c Yes \(\text{No} \) 8b It 'Yes,' did the foundation receive any proceeds or have any net income attributable to the transaction? 1 List all officers, directors, trustees, foundation managers and their compensation (see instructions). 1 List all officers, directors, trustees, foundation managers and their compensation (see instructions). 1 List all officers, directors, trustees, foundation managers and their compensation (see instructions). 1 List all officers, directors, trustees, foundation managers and their compensation (see instructions). 1 List all officers, directors, trustees, foundation managers and their compensation (see instructions). 1 List all officers, directors, trustees, foundation directors and active received the foundation and active received the foundation and active received the position of the foundation and active received the foundation and their received received the foundation and their received receive	Organizations relying on a current notice rega	rding disaster assistant	ce check here	▶ []		
6 a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? bid the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If Yes to 6b, file Form 8870 7 a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? If Yes to 6b, file Form 8870 7 a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? If Yes to 6b, file Form 8870 7 a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? If Yes to 6b, file Form 8870 7 a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? If Yes to 6b, file Form 8870 7 a At any time during the tax year, was the foundation and party to a prohibited tax shelter transaction? If Yes to 6b, file Form 8870 7 a At any time during the tax year, was the foundation and party to a prohibited tax shelter transaction? If Yes to 6b, file Form 8870 7 a At any time during the tax year, was the foundation and party to a prohibited tax shelter transaction? If Yes to 8b, file Form 8870 7 b to 6b the foundation during the year, pay premiums, directly on a personal benefit contract? If Yes to 6b, file Form 8870 7 b to 6b the foundation form 870 to 6b the file file file file file file file fil	the answer is les to question sa(4), does	the foundation claim ex sibility for the grant?	emption from the	N/A Yes	No	
on a personal benefit contract? bid the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? bid the foundation giving the year, pay premiums, directly or indirectly, on a personal benefit contract? 7 a At any time during the lax year, was the foundation a party to a prohibited tax shelter transaction? 7 a At any time during the lax year, was the foundation a party to a prohibited tax shelter transaction? 9 Yes X No 1 It is all officers of during the lax year, was the foundation a party to a prohibited tax shelter transaction? 1 List all officers, directors, trustees, foundation managers and their compensation (see instructions). (a) Name and address (b) Title, and average hours per week devoted to position (a) Name and address President 5.00 SUSAN HAWKINS President 5.00 SEDONA, AZ 86336 WALLY ARNOLD Vice Preside 0. 0. 0. 224 OREGON ST. 1.00 Li SEGUNDO, CA 90245 KATHY ARNOLD SECONDO, CA 90245 Treasurer 1.00 Li SEGUNDO, CA 90245 FRAN GRACE P. 0. BOX 1435 1.00 REDIANDS, CA 92373 1.00 2 Compensation of five highest-paid employees (other than those included on line 1 – see instructions). If none, enter 'NONE' (e) Expense account, other allowances of each employee hours per week devoted to position None (c) Compensation (d) Contributions to employee hours per week devoted to position (d) Compensation (e) Expense account, other allowances of each employee other than those included on line 1 – see instructions). If none, enter 'NONE' (e) Expense account, other allowances compensation of the position of the pos	If 'Yes,' attach the statement required by Reg	ulations section 53 4945	5—5(d)			
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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 (see instructions). (a) Name and address (b) Title, and average house paid more than \$50,000 (i) Title, and average house paid more than \$50,000 (i) Title, and average house paid more than \$50,000 (i) Title, and average house paid more than \$50,000 (i) Title, and average house paid the foundation Managers, Highly Paid Employee benefit plans and deferred (c) Expense account, other allowances of the railowances of the	•	d-4				,
Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors					-	
Tand Contractors 1 List all officers, directors, trustees, foundation managers and their compensation (see instructions). (a) Name and address (b) Title, and average hours per week devoted to position (fir not paid, enter-0.) SUSAN_HAWKINS President 0. 0. 0. 0. 0. 151 KELLER IN. 5.00 SEDONA, AZ 86336 WALLY ARNOLD Vice Preside 0. 0. 0. 0. 0. 0. 224 OREGON ST. 1.00 EL SEGUNDO, CA 90245 KATHY ARNOLD Secretary 0. 0. 0. 0. 0. 0. 224 OREGON ST. 1.00 EL SEGUNDO, CA 90245 FRAN GRACE Treasurer 0. 0. 0. 0. 0. 0. 0. 0. 0. 0. 0. 0. 0.					.,	
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SEDONA, AZ 86336	(a) Name and address			plans and deferred		
SEDONA, AZ 86336 WALLY ARNOLD	SUSAN HAWKINS	President	0.	0.		0.
WALLY ARNOLD 224 OREGON ST. EL SEGUNDO, CA 90245 KATHY ARNOLD 224 OREGON ST. 1.00 Secretary 1.00 1.00 0.00	151 KELLER LN.	5.00				
224 OREGON ST. 1.00	SEDONA, AZ 86336					
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Secretary 1.00 0. 0. 0. 0. 224 OREGON ST. 1.00 1.00 0. 0. 0. 0.		1.00				
224 OREGON ST. 1.00 EL SEGUNDO, CA 90245 FRAN GRACE Treasurer 0. 0. 0. 0. 0. 0. P.O. BOX 1435 REDLANDS, CA 92373 2 Compensation of five highest-paid employees (other than those included on line 1 – see instructions). If none, enter 'NONE' (a) Name and address of each employee hours per week devoted to position None (c) Compensation (d) Contributions to employee benefit plans and deferred compensation (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 (o) Compensation		Cognotoni		 	ļ	
EL SEGUNDO, CA 90245 FRAN GRACE P.O. BOX 1435 REDLANDS, CA 92373 2 Compensation of five highest-paid employees (other than those included on line 1 – see instructions). If none, enter 'NONE.' (a) Name and address of each employee paid more than \$50,000 None (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		1 -	0.	0.	[0.
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2 Compensation of five highest-paid employees (other than those included on line 1 – see instructions). 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 (o) Compensation (o) Compensation (d) Contributions to employee benefit plans and deferred compensation (e) Expense account, other allowances		1.00				
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None None N						
	(a) Name and address of each employee paid more than \$50,000	hours per week	(c) Compensation	plans and deferred	(e) Expense other all	e account, lowances
Total number of other employees paid over \$50,000	None					 _
Total number of other employees paid over \$50,000						
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Total number of other employees paid over \$50,000		}			}	
	Total number of other employees paid over \$50,000	0		<u> </u>		0

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Part VIII Information About Officers, Directors, Trustee		
and Contractors (continued) 3 Five highest-paid independent contractors for professional servi	ices (see instructions). If none, enter 'NONE	
(a) Name and address of each person paid more than \$50,000		(c) Compensation
None		
Total number of others receiving over \$50,000 for professional services		- 0
Part X-A Summary of Direct Charitable Activities		
List the foundation's four largest direct charitable activities during the tax year. Include rele organizations and other beneficiaries served, conferences convened, research papers produ	evant statistical information such as the number of	Expenses
1 N/A	ced, etc	
' N/A		
, 2		
3		
3		
4		
·		
Part IX-B. Summary of Program-Related Investments (s	ee instructions)	
Describe the two largest program-related investments and by the foundation		Amount
1		
N/A		
2		
All other program related investments. See instructions		

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Total. Add lines 1 through 3

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Part X Minimum Investment Return (All domestic foundations must complete this see instructions.)	s part. Foreign founda	tions,
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	1 a	
b Average of monthly cash balances	1 b	
c Fair market value of all other assets (see instructions)	16	
d Total (add lines 1a, b, and c)	1 d	
e Reduction claimed for blockage or other factors reported on lines 1a and	- <u>- u</u>	0.
1c (attach detailed explanation)		
2 Acquisition indebtedness applicable to line 1 assets		
3 Subtract line 2 from line 1d	3	
	-3	
4 Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	
5 Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line	4 5	0.
6 Minimum investment return. Enter 5% of line 5	6	0.
Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) prival and certain foreign organizations check here ► ☐ and do not complete the		ions
1 Minimum investment return from Part X, line 6.	11	
2a Tax on investment income for 2016 from Part VI, line 5	423.	
b Income tax for 2016. (This does not include the tax from Part VI)		
c Add lines 2a and 2b	2 c	423.
3 Distributable amount before adjustments Subtract line 2c from line 1	3	-423.
4 Recoveries of amounts treated as qualifying distributions	4	
5 Add lines 3 and 4	5	-423.
6 Deduction from distributable amount (see instructions)	6	
7 Distributable amount as adjusted. Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	0.
Part XII Qualifying Distributions (see instructions)		
Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes a Expenses, contributions, gifts, etc. — total from Part I, column (d), line 26	1a	14,550.
b Program-related investments total from Part IX-B	1 b	
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purp	ooses 2	
3 Amounts set aside for specific charitable projects that satisfy the a Suitability test (prior IRS approval required)	3a	

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

Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4

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)

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b Cash distribution test (attach the required schedule)

6 Adjusted qualifying distributions. Subtract line 5 from line 4

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14,550.

14,550.

3 b

4

5

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2015	(c) 2015	(d) 2016
Distributable amount for 2016 from Part XI, line 7				0.
2 Undistributed income, if any, as of the end of 2016.				<u></u>
a Enter amount for 2015 only			0.	
b Total for prior years. 20 , 20 , 20		0.		
3 Excess distributions carryover, if any, to 2016.				
a From 2011		·		
b From 2012 11, 182.			1	
c From 2013 1,906.				
d From 2014 4, 380.				
e From 2015 5, 250.				
f Total of lines 3a through e	22,718.			
4 Qualifying distributions for 2016 from Part				
XII, line 4 > \$ 14,550.				
a Applied to 2015, but not more than line 2a			0.	
b Applied to undistributed income of prior years			}	
(Élection required – see instructions)		0.		
c Treated as distributions out of corpus	0		1	
(Election required – see instructions) d Applied to 2016 distributable amount	0.			0.
e Remaining amount distributed out of corpus	14 550			<u></u>
5 Excess distributions carryover applied to 2016	14,550. 0.			0.
(If an amount appears in column (d), the				0.
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	37,268.			
ļ.	31,200.			
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) I				
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 instructions.			0.	
into Ed. Yakabio amount. Soc mot acciona				
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				
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 (see instructions)	0.			
9 Excess distributions carryover to 2017.	·			
Subtract lines 7 and 8 from line 6a	37,268.			
10 Analysis of line 9				
a Excess from 2012 11, 182.			Ì	
b Excess from 2013 1, 906.			\	
c Excess from 2014 4, 380.				
d Excess from 2015 5, 250.		į		
e Excess from 2016 14,550.		<u> </u>		Form 990 PF (2016)

orm 990 PF (2016) THE INSTITUTE FOR SPIRITUAL RESEARCH INC 94-2898927 Page 10						
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 foundat		rating foundation de		4942(j)(3) or	4942(J)(5)	
2a Enter the lesser of the adjusted net income from Part I or the minimum	Tax year	45 201E	Prior 3 years	(4) 2012	(e) Total	
investment return from Part X for each year listed	(a) 2016	(b) 2015	(c) 2014	(d) 2013		
b 85% of line 2a						
 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			1			
a 'Assets' alternative test — enter						
(1) Value of all assets						
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)						
b 'Endowment' alternative test — enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed						
c 'Support' alternative test — enter:						
 Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) 						
(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 assets at any time during the	(Complete this	part only if the	foundation had	\$5,000 or more	in	
Information Regarding Foundation Managers of the foundation who have close of any tax year (but only if they have None	gers:	nan 2% of the total co	entributions received section 507(d)(2).)	by the foundation bef	ore 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 0% or greater intere	n (or an equally large est	portion of the owner	ship of	
2 Information Regarding Contribution, Grant, C Check here ► X If the foundation only ma requests for funds If the foundation makes gr complete items 2a, b, c, and d	kes contributions to	preselected charitable				
a The name, address, and telephone number of	e-mail address of th	ne person to whom ap	pplications should be	addressed:		
b The form in which applications should be submitted and information and materials they should include.						
c Any submission deadlines:						
d Any restrictions or limitations on awards, s	such as by geograp	hical areas, charital	ble fields, kinds of i	nstitutions, or other	factors	

Form 990-PF (2016) THE INSTITUTE FOR SPIRITUAL RESEARCH INC 94-2898927 Page 11 Part XV Supplementary Information (continued) 3 Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, show any relationship to any foundation manager or substantial contributor oundation Recipient Purpose of grant or contribution status of recipient Amount Name and address (home or business) a Paid during the year Total ► 3a **b** Approved for future payment

Total

3ь

Ca Amount Exclusion Amount Exclusion Amount Exclusion Code	iter gross	amounts unless otherwise indicated	Unrelated business income Excluded by section 512, 513, or 514				(e)	
a b c c d d d d d d d d d d d d d d d d d	. 5		Business		Exclu- sion		Related or exempt	
b c c d d d d d d d d d d d d d d d d d	•	am service revenue	 		code	·	<u> </u>	
g Fees and contracts from government agencies Membership dues and assessments Interest on savings and temporary cash investments Interest on savings and temporary cash investments Debt-financed property Not debt-financed property Not debt-financed property Not rental income or (loss) from personal property Not rental income or (loss) from personal property Net rental income or (loss) from sales of assets other than inventory Net income or (loss) from sales of inventory Other revenue: Subtotal Add columns.(b), (d), and (e) Subtotal Add columns.(b), (d), and (e) Subtotal Add line 12, columns (b), (d), and (e) Subtotal Add line 12, columns (b), (d), and (e) Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)	. —		 					
g Fees and contracts from government agencies g Membership dues and assessments linterest on savings and temporary cash investments linterest on savings and savings and savings and savings and savings and savings and savings and savings and savings and savings and savings and savings and savings and savings and savings and savings and savings and savings and savings and savings a	c							
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Membership dues and assessments Interest on savings and temporary cash investments Interest of savings and temporary cash investments Interest of savings and temporary cash investments Interest of savings and temporary cash investments Interest of savings and temporary cash investments Interest of savings and temporary cash investments Interest on savings and temporary cash investments Interest on savings and temporary cash investments Interest on savings and temporary cash investments Interest on savings and temporary cash investments Interest on savings and temporary cash investments Interest on savings and temporary cash investments Interest on savings and temporary cash investments Interest on savings and temporary cash investments Interest on savings and temporary cash investments Interest on savings and temporary cash investments Interest on savings and temporary cash investments Interest on savings and temporary cash investments Interest on savings and temporary cash investments Interest on savings and temporary cash investments Interest on savings and temporary cash investments Interest on savings and temporary cash investments Interest on savings and temporary cash in savings and savings	ė	- · · · · · · · · · · · · · · · · · · ·						
Membership dues and assessments Interest on savings and temporary cash investments Invidends and interest from securities Dividends and interest from sales of any any and any any any any any any any any any any	1	and contracts from government agencies	 		- - -		 _	
Interest on savings and temporary cash investments Dividends and interest from securities Net rental income or (loss) from real estate: a Debt-financed property b Not debt-financed property Other investment income Gain or (loss) from sales of assets other than inventory Net income or (loss) from special events Gross profit or (loss) from sales of inventory Other revenue: a Bubtotal Add columns (b), (d), and (e) B Subtotal Add columns (b), (d), and (e) B Subtotal Add ine 12, columns (b), (d), and (e) B Subtotal Add ine 12, columns (b), (d), and (e) B Subtotal Add ine 12, columns (b), (d), and (e) B Subtotal Add columns (b), (d), and (e) B Subtotal Add ine 12, columns (b), (d), and (e) B Subtotal Add columns (b), (d), and (e) B Subtotal Add ine 12, columns (b), (d), and (e) B Subtotal Add ine 12, columns (b), (d), and (e) B Subtotal Add ine 12, columns (b), (d), and (e) B Subtotal Add columns (b), (d), and (e) B Subtotal Add columns (b), (d), and (e) B Subtotal Add ine 12, columns (b), (d), and (e) B Subtotal Add columns (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)	_		 		++-			
A Dividends and interest from securities Net rental income or (loss) from real estate: a Debt-financed property b Not debt-financed property Cother investment income Gain or (loss) from sales of assets other than inventory Net income or (loss) from special events Gross profit or (loss) from sales of inventory Other revenue: a b b c c c c c c c c c c c c c c c c c		•					341	
a Debt-financed property b Not debt-financed property 5 Net rental income or (loss) from personal property 7 Other investment income 8 Gain or (loss) from sales of assets other than inventory 9 Net income or (loss) from special events 10 Gross profit or (loss) from sales of inventory 11 Other revenue 12 Subtotal Add columns (b),_(d),_and (e) 13 47,28 15 See worksheet in line 13 instructions to verify calculations.) 16 Total. Add line 12, columns (b) Activities to the Accomplishment of Exempt Purposes 16 Interval Incomplete Interval Incomplete I							38,931	
b Not debt-financed property Net rental income or (loss) from personal property Other investment income Gain or (loss) from sales of assets other than inventory Net income or (loss) from sales of assets other than inventory Other investment income Gross profit or (loss) from sales of inventory Other revenue a b c c d d e 2 Subtotal Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) we worksheet in line 13 instructions to verify calculations.) art XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes ine No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)	5 Net re	ental income or (loss) from real estate:						
Net rental income or (loss) from personal property Other investment income Gain or (loss) from sales of assets other than inventory Net income or (loss) from special events Gross profit or (loss) from sales of inventory Other revenue Subtotal Add columns (b), (d), and (e) Subtotal Add line 12, columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculations.) Total. Relationship of Activities to the Accomplishment of Exempt Purposes ine No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)	a Debt-	financed property						
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Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)	2 Subto					13	47,284 47,284	
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Form 990-PF (2016) THE INSTITUTE FOR SPIRITUAL RESEARCH INC 94-2898927 Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

								Yes	NO
describ	organization directly ed in section 501(c) c to political organizat	of the Code (of	ngage in any of the following w ther than section 501(c)(3) orga	ith any othe nizations) o	r organizatio r in section 5	n 527,			
-	, ,		a noncharitable exempt organia	zation of					1
(1) Cas	sh						1a(1)	<u>, </u>	X
(2) Other assets							1 a (2)	,	X
b Other to	ransactions							1	
(1) Sales of assets to a noncharitable exempt organization									Х
(2) Pur	rchases of assets fron	n a noncharita	ble exempt organization				1 b (2)	,	X
(3) Rer	ntal of facilities, equip	ment, or othe	r assets .				1 b (3)	,	X
(4) Rei	imbursement arranger	ments					1 b (4)		X
(5) Loa	ans or loan guarantee	s					1 b (5		X
(6) Per	rformance of services	or membersh	ip or fundraising solicitations		•		1 b (6))	Χ
c Sharing	g of facilities, equipme	ent, mailing lis	sts, other assets, or paid employ	yees		•	1 c		X
any tra	nsaction or sharing ar	rrangement, sl	complete the following schedul the reporting foundation. If the foundation in column (d) the value of	the goods, o	other assets,	or services	received		
(a) Line no	(b) Amount involved	(c) Name o	of noncharitable exempt organization	(d) De	scription of tran	sters, transaction	ons, and sharing arr	angemen	ts
N/A				 					
				 					
				 					
				 					
				 					
		 		 					
				 					
									
	 	<u> </u>		<u> </u>					
				 -					
				 			<u></u>		
				 					
									
				 					
				 					
		L							
describ	ed in section 501(c) o	of the Code (o	d with, or related to, one or more ther than section 501(c)(3)) or i	ax-exempt on section 52	rganizations 27?		Y	es X	No
	complete the follows		(L) T	_ T		N Dagawakan	f - c - t - c - c - c - c - c - c - c - c - c		
	a) Name of organization	on	(b) Type of organizatio	n	(c	Description	n of relationship		
<u>N/A</u>									
	 								
		··					 		
Linda						Ab - b - A - 6	learning and bales		
correc	t, and complete Declaration	of preparer (other	iined this return, including accompanying s than taxpayer) is based on all information	of which prepar	rer has any know	ledge	Knowledge and belief	, it is true	••
Sign) /	7 1					May the	e IRS disc urn with t	cuss
Here t	de sous	6 lotan	15-24-	ク Pro	esident		prepare	er shown	below
Sign	nature of officer or trustee		Date	Title				X Yes	No
	Print/Type preparer's nam	ne	Pleparer's signature		Date /	Check	X if PTIN		السياسة
Paid	JAMES M	6R41	F Jame M X	rad	5/24/1	self-emplo	' 1 // -	20:	3636
Preparer		ames M. (Graif C.P.A.	$\overline{\nu}$	11	Firm's EIN	76-079617	ىــــــــــــــــــــــــــــــــــــ	-
Use Only	_		wy 89A #3			<u> </u>	<u>, 0 0, 0011</u>		
Jac Only	_		Z 86336			Phone no	(928) 204	-5672	2
BAA		caona, At				<u></u>	Form 9		
							1 01111 2	~~	_\J.\J/

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

Department of the Treasury Internal Revenue Service

Schedule of Contributors

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

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

OMB No 1545-0047

2016

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

Name of the organization		Employer identification number
THE INSTITUTE FOR SPIR	RITUAL RESEARCH INC	94-2898927
Organization type (check one)		
Filers of:	Section:	
Form 990 or 990-EZ	501(c)() (enter number) organ	nization
	4947(a)(1) nonexempt charitable trus	st not treated as a private foundation
	527 political organization	·
Form 990-PF	X 501(c)(3) exempt private foundation	
	4947(a)(1) nonexempt charitable trus	st treated as a private foundation
	501(c)(3) taxable private foundation	
	our (o) (o) taxable private loandation	
Check if your organization is covered by	y the General Rule or a Special Rule.	
Note. Only a section 501(c)(7), (8),	or (10) organization can check boxes for both the Ge	eneral Rule and a Special Rule See instructions.
General Rule		
X For an organization filing Form property) from any one contribu	990, 990-EZ, or 990-PF that received, during the year itor Complete Parts I and II See instructions for dete	r, contributions totaling \$5,000 or more (in money or ermining a contributor's total contributions
Special Rules		
under sections 509(a)(1) and 1700 received from any one contribute	n section 501(c)(3) filing Form 990 or 990-EZ that me (b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-E tor, during the year, total contributions of the greater (ii) Form 990-EZ, line 1. Complete Parts I and II	t the 33-1/3% support test of the regulations EZ), Part II, line 13, 16a, or 16b, and that of (1) \$5,000 or (2) 2% of the amount on (i)
For an organization described in during the year, total contribution purposes, or for the prevention	n section 501(c)(7), (8), or (10) filing Form 990 or 990 ons of more than \$1,000 <i>exclusively</i> for religious, char of cruelty to children or animals. Complete Parts I, II,	D-EZ that received from any one contributor, ritable, scientific, literary, or educational , and III.
during the year, contributions e. \$1,000 If this box is checked, e charitable, etc., purpose Don't	n section 501(c)(7), (8), or (10) filing Form 990 or 990 xclusively for religious, charitable, etc., purposes, but enter here the total contributions that were received discomplete any of the parts unless the General Rule appose, charitable, etc., contributions totaling \$5,000 or not seem to the parts unless that were received discomplete any of the parts unless the General Rule apposes.	no such contributions totaled more than uring the year for an <i>exclusively</i> religious, opplies to this organization because
990-PF), but it must answer 'No' or	covered by the General Rule and/or the Special Rules n Part IV, line 2, of its Form 990, or check the box on n't meet the filing requirements of Schedule B (Form 9	line H of its Form 990-FZ or on its Form 990-PF

BAA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF.

O 1 1 1	_	·- ·	~~~	^^^					
Schedule	ы	(Form :	990,	990-EZ,	or	990-PF) ((2016)	

Page

1 of

1 of Part I

Name of organization
THE INSTITUTE FOR SPIRITUAL RESEARCH INC

Employer identification number 94-2898927

			
Part I	Contributors (see instructions) Use duplicate copies of Part I if additional space	is needed	
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	WILBERT S. FOLDS TRUST 2785 FLORIBUNDA DR. COLUMBUS, OH 43209-3119	\$ <u>10,000.</u>	Person X Payroll Noncash (Complete Part II for noncash contributions)
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
	RICHARD & CAROL DRURY P.O. BOX 445 FRIDAY HARBOR, WA 98250	\$5,000.	Person X Payroll Noncash (Complete Part II for noncash contributions)
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
3	DAVID R. HAWKINS Q. P. R. TRUST 151 KELLER LANE SEDONA, AZ 86336	\$399,000.	Person Payroll Noncash X (Complete Part II for noncash contributions)
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
4	EUNYOUNG OH KWONSUNGU MAESILO 70 102-705 KYUNGGIDO, 16395 Korea, Republic of (South)	\$7,000.	Person X Payroll Noncash (Complete Part II for noncash contributions)
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Complete Part II for noncash contributions)
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Complete Part II for noncash contributions)

Page

1 to

1 of Part II

THE INSTITUTE FOR SPIRITUAL RESEARCH INC

Employer identification number

94-2898927

Part II	Noncash Property (see instructions) Use duplicate copies of Part II if additional sp	pace is needed	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
3	LAND AND BUILDING		
		\$399,000.	7/01/16
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		 \$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		e	S.
			·
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		s	
(-) N -	4)	()	48
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
BAA	. I	 	7 or 990-PF) (201)

1 to

of Part III

Name of organization
THE INSTITUTE FOR SPIRITUAL RESEARCH INC

1 Employer identification number 94-2898927

Daisell (7 / / / U			34 2030327
Part III				
	or (10) that total more than \$1,000 for the	ne year from any one contrib	utor. Complet	e columns (a) through (e) and
	the following line entry For organizations of	empleting Part III, enter the tota	of exclusive	ely religious, charitable, etc ,
	contributions of \$1,000 or less for the year Use duplicate copies of Part III if additional	(Enter this information once Se	e instruction	s)
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift		(d) Description of how gift is held
	N/A			
		· · · · · · · · · · · · · · · · · · ·		
			·	
			· 	
		(a)		
		(e) Transfer of gift		
	Transferee's name, addres		Rela	tionship of transferor to transferee
		· · · · · · · · · · · · · · · · · · ·		
			·	·
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	L			
	45			\A\
(a) No. from	(b) Purpose of gift	(c) Use of gift		(d) Description of how gift is held
Part I	, mposs or give	930 01 g.m		Doscription of new gire is need
~		~		
		(0)		
		(e) Transfer of gift		
	Transferee's name, addres	c and 7ID ± 4	Rela	tionship of transferor to transferee
-				
	<u> </u>			
(2)	(b)	(6)	-	14
(a) No. from	Purpose of gift	(c) Use of gift		(d) Description of how gift is held
Part I				
	[
				·
		(e)		
		Transfer of gift		
	Transferee's name, addres	s, and ZIP + 4	Rela	tionship of transferor to transferee
	Γ			
(a)	(b)	(c)		(d)
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift		Description of how gift is held
Part I				
	L			
		(e)		
	_	(e) Transfer of gift		
	Transferee's name, addres	s, and ZIP + 4	Rela	tionship of transferor to transferee
	L			

2016	Federal Statements	Page 1
	THE INSTITUTE FOR SPIRITUAL RESEARCH INC	94-2898927
Statement 1 Form 990-PF, Part I, Line 16b Accounting Fees	(a) (b) Net (c) Expenses Investment Adjusted per Books Income Net Income	(d) Charitable Purposes
	Total $\frac{\$}{\$}$ $\frac{1,100.}{1,100.}$ $\frac{\$}{\$}$ $\frac{0.}{\$}$	\$ 0.
Statement 2 Form 990-PF, Part I, Line 16c Other Professional Fees		
BROKER FEES	(a) (b) Net (c) Expenses Investment Adjusted per Books Income Net Income \$ 26,143. \$ 26,143. \$ 26,143. Total \$ 26,143. \$ 26,143. \$ 0.	
- Statement 3 Form 990-PF, Part I, Line 18 Taxes		
PROPERTY TAXES	(a) (b) Net (c) Expenses Investment Adjusted per Books Income Net Income \$ 3,722. \$ 0. \$ 0.	(d) Charitable Purposes \$ 0.
Statement 4 Form 990-PF, Part I, Line 19 Allocated Depreciation		
Date Cost <u>Acquired Basis</u> LEASEHOLD IMPROVEMENTS 1/01/11 7,612	Prior Yr Depr Method Rate Life Yr Depr Incom 5,428 S/L 7 1,087	vest Adjusted ne <u>Net Income</u> 0 0
LEASEHOLD IMPROVEMENTS 1/31/12 17,132	9,584 S/L 7 2,447	0 0
COMPUTER 3/03/12 2,000	1,533 S/L 5 400	0 0
LEASEHOLD IMPROVEMENTS 8/01/16 10,000	S/L 7 595	0 0
BUILDING 7/01/16 149,000	S/L 0.0118 1,754	0 0

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Federal Statements

Page 2

THE INSTITUTE FOR SPIRITUAL RESEARCH INC

94-2898927

Statement 5 Form 990-PF, Part I, Line 23 Other Expenses

		(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable <u>Purposes</u>
OUTSIDE SERVICES REPAIRS & MAINTENANCE .	Total	\$ 466. 4,700. \$ 5,166.	\$ 0.	<u>\$</u>	<u>\$ 0.</u>

Statement 6 Form 990-PF, Part I, Line 25 Contributions, Gifts, and Grants

Cash Grants and Allocations

Class of Activity:

Donee's Name: Donee's Address:

Organizational Status of Donee:

Organizational Status of Donee:

Amount Given:

Donee's Name:

Amount Given:

DONATION

ST. ANDREW'S EPISCOPAL CHURCH 100 ARROYO PINON DR.

SEDONA AZ 86336

501 (C) 3

DONATION

VARIOUS QUALIFIED CHARITIES

501 (C) 3

Class of Activity:

Class of Activity: Donee's Name:

Donee's Address:

RESEARCH GRANT TAYLOR ZEHREN

254 N. MAIN ST. APT. A

ASHLAND OR 97520

INDIVIDUAL

Organizational Status of Donee:

Amount Given:

10,000.

Total \$ 14,550.

\$

2,000.

2,550.

Statement 7 Form 990-PF, Part II, Line 14 Land, Buildings, and Equipment

Category		Basis	 Accum. Deprec.	_	Book Value	F	air Market Value
Machinery and Equipment Buildings Improvements Land	\$ Total \$	39,197. 149,000. 34,744. 250,000. 472,941.	\$ 39,197. 1,754. 19,074.	-	0. 147,246. 15,670. 250,000. 412,916.	\$	0. 147,246. 15,670. 250,000. 412,916.

2016 Page 3 **Federal Statements** 94-2898927 THE INSTITUTE FOR SPIRITUAL RESEARCH INC Statement 8 Form 990-PF, Part III, Line 3 Other Increases MUNICIPAL BOND INTEREST Total \$

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Account Statement For INSTITUTE FOR SPIRITUAL-CONSOLIDATED

| Consolidated Account Number AGG658059

Period Covered January 1, 2016 - December 31, 2016

REALIZED GAIN/LOSS DETAIL (continued)

Date Sold	2 QUANTITY	Asset Description	Cost Basis	PROCEEDS	SHORT TERM REALIZED GAIN/LOSS	LONG TERM REALIZED GAIN/LOSS
07/01/16	25,000.000	PIMA CNTY AZ UNIF SC 4.500% 7/01/16	- 25,000.00	25,000.00	0.00	0.00
		ACCOUNT NUMBER 65805901 25,000 0000 UNITS ACQUIRED ON 05/1;4/1 ³	25,000 00			
04/08/16	2,795.899	PIMCO EMERG MKTS BD-INST #137	- 30,000.00	26,952.47	0.00	- 3,047.53
		ACCOUNT NUMBER 65805900 2,795 8990 UNITS ACQUIRED ON 12/24/13	30,000,05			
04/08/16	2,447.835	PIMCO FOREIGN BD FD USD H-INST #103	- 27,219.93	24,870.00	0.00	- 2,349.93
		ACCOUNT, NUMBER 65805900 2,447 8350 UNITS ACQUIRED ON 08/27/14	27,21993	••		
10/07/16	0.637	REAL ESTATE SELECT SECT SPDR	- 20 74	19.77	- 0.97	000
		ACCOUNT NUMBER 65805900 0 6370 UNITS ACQUIRED ON 09/22/16	2074			
04/12/16	1,745.000	VANGUARD SHORT TERM BOND ETF	- 140,592 60	140,678.83	383.76	- 297.53
		ACCOUNT NUMBER 65805900 500 0000 UNITS ACQUIRED ON 11/06/12 1,245 0000 UNITS ACQUIRED ON 02/04/16	40,606 65 99,985 95			
04/08/16	15,060.241	WELLS FARGO S/T MUNI-INS #3161	- 150,000.00	150,000.00	00:0	000
		ACCOUNT NUMBER 65805900 15,060 2410 UNITS ACQUIRED ON 08/22/1 3	00 000'05'			
07/14/16	3,208.800	WF ULTRA SH-TRM MUNI INC-! #3107	- 30,869.30	30,900.74	31.44	00:00
		ACCOUNT NUMBER 65805901 64 8000 UNITS ACQUIRED ON 07/06/16 3.144 0000 UNITS ACQUIRED ON 03/03/16	62402 · 30,24528	,		
07/15/16	2,824.600	WF ULTRA SH-TRM MUNI INC-I #3107	- 27,200.90	27,200.90	0.00	000
	•	ACCOUNT NUMBER 65805901 2,824 6000 UNITS ACQUIRED ON 07/06/16	27,200 90			
Total This Period		-	- \$916,177.18	\$924,189.21	- \$4,810 75	\$12,822.78
Leave at the part of a part boother and a contempt to the form	יי שיר שישיייי	sesson in a few transfer to the session of the property of the	or retirement	200007110		

Gain/Loss information is un-audited and should not be used for tax preparation, estate and/or retirement planning purposes



Account Statement For INSTITUTE FOR SPIRITUAL-CONSOLIDATED

Period Covered January 1, 2016 - December 31, 2016

Consolidated Account Number AGG658059

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DATE SOLD 04/08/16

12/01/16

03/01/16

04/12/16

04/12/16

04/08/16

12/22/16

07/01/16

04/08/16

	Asset		ı	SHORT TERM	LONGTERM
QUANTITY	i	COST BASIS	PROCEEDS	REALIZED GAIN/LOSS	REALIZED GAIN/LOSS
924.883	EATON VANCE FLOATING RATE FD-1 #924	- 8,277.70	7,880.00	0.00	- 397.70
	ACCOUNT NUMBER 65805900 924 8830 UNITS ACQUIRED ON 05/30/12	8,277 70			
7,507.508	FPA NEW INCOME FUND #78	-77,327.33	75,000.00	0.00	- 2,327.33
	ACCOUNT NUMBER 65805900 7,507 5080 UNITS ACQUIRED ON 05/22/14	77.32733			
25,000.000	INDIANA ST FIN AUTH 5.000% 3/01/16	- 25,000.00	25,000,00	00 0	0.00
	ACCOUNT NUMBER 65805901 25,000 0000 UNITS ACQUIRED ON 04/04/13	25,000 00			
150.000	ISHARES CORE S & P 500 ETF	- 20,010.49	30,921.82	0.00	10,911.33
	ACCOUNT NUMBER 65805900 25 0000 UNITS ACQUIRED ON 05/30/12 125 0000 UNITS ACQUIRED ON 06/11/12	3,31425 16,69624			
290.000	ISHARES CORE S&P MIDCAP ETF	- 27,772.84	41,295.10	0000	13,522 26
,	ACCOUNT NUMBER 65805900 50 0000 UNITS ACQUIRED ON 05/30/12 75 0000 UNITS ACQUIRED ON 06/11/12 125 0000 UNITS ACQUIRED ON 08/08/12 40 0000 UNITS ACQUIRED ON 01/09/13	4,65900 6,91650 11 983 74. 4,213 60			
1,213.723	JOHCM INTERNATIONAL SEL-I #180	- 22,126.17	21,580.00	0.00	- 546.17
•	ACCOUNT NUMBER 65805900 1,213 7230 UNITS ACQUIRED ON 05/01/14	22,1261,7			
10,336.476	LOOMIS SAYLES BOND FD INSTL #1162	- 154,300.00	> 140,265.98	1,441.10	- 15,475.12
	ACCOUNT NUMBER 65805900 7,334 1840 UNITS ACQUIRED ON 05/22/14 3,002 2920 UNITS ACQUIRED ON 04/07/16	115,000 00 39,300 00			
25,000.000	MARICOPA CNTY ARIZ 4.125% 7/01/19	- 25,000.00	25,000.00	0.00	00:0
	ACCOUNT NUMBER 65805901 25,000 0000 UNITS ACQUIRED ON 05/15/13	25,000 00		•	
876.840	MONDRIAN INTERNATIONAL EQUITY FUND	- 11,670.74	11,320.00	- 350.74	0.00
	ACCOUNT NUMBER 65805900 876 8400 UNITS ACQUIRED ON 09/30/15	11,67074			



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Account Statement For INSTITUTE FOR SPIRITUAL-CONSOLIDATED

Consolidated Account Number AGG658059

Period Covered January 1, 2016 - December 31, 2016

REALIZED GAIN/LOSS DETAIL

Date Sold	QUANTITY	Asset Description	Cost Basis	PROCEEDS	SHORT TERM REALIZED GAIN/LOSS	LONG TERM REALIZED GAIN/LOSS
04/08/16	552 163	ABERDEEN GLOBAL HIGH INCOME FD #5497	- \$5,387.59	\$4,340.00	\$0.00	-\$1,047.59
		ACCOUNT NUMBER 65805900 499 2160 UNITS ACQUIRED ON 08/08/12 52 9470 UNITS ACQUIRED ON 12/17/13	4,849 12 538 47			
12/22/16	3,366.391	ABERDEEN GLOBAL HIGH INCOME FD #5497	- 29,461.53	28,008.37	76 797	- 1,721.13
		ACCOUNT NUMBER 65805900 2,436 0540 UNITS ACQUIRED ON 11/30/16 930 3370 UNITS ACQUIRED ON 12/17/13	20,000 00 9,461 53			
04/12/16	180.000	AMEX CONSUMER DISCR SPDR	-8,188.84	14,135.09	0.00	5,946.25
		ACCOUNT NUMBER 65805500 125 0000 UNITS ACQUIRED ON 08/08/12 55 0000 UNITS ACQUIRED ON 12/10/12	5,586 24 2,602 60			
04/12/16	80.000	AMEX MATERIALS SPDR	- 2,877.59	3,555.12	0.00	677 53
		ACCOUNT NUMBER 65805900 80 0000 UNITS ACQUIRED ON 08/08/12	2,877.59			
04/12/16	650.000	AMEX TECHNOLOGY SELECT SPDR	- 19,506.18	28,716.37	0.00	9,210.19
		ACCOUNT NUMBER 65805900 650 0000 UNITS ACQUIRED ON 08/08/1,2	19,506 18:			
04/08/16	872.033	ASG GLOBAL ALTERNATIVES-Y #1993	- 9,915.02	8,450.00	000	- 1,465 02
	•••	ACCOUNT NUMBER 65805900 872 0330 UNITS ACQUIRED ON 08/16/13	6,98502			
11/02/16	1,502.637	ASG GLOBAL ALTERNATIVES-Y #1993	- 17,084.98	14,635.68	0.00	- 2,449.30
	••	ACCOUNT NÚMBER 65805900 1,502 6370 UNITS ACQUIRED ON 08/16/13	17,084 98			
04/12/16	210.000	CONSUMER STAPLES SECTOR SPDR TR	-7,534.19	11,213.76	0.00	3,679.57
		ACCOUNT NUMBER 65805900 150 0000 UNITS ACQUIRED ON 08/08/12 60 0000 UNITS ACQUIRED ON 12/10/12	5,366 99 2,167 20		ģ#	
01/29/16	350.000	E-TRACS ALERIAN MLP INFRASTRUCTURE	- 13,832.52	7,249.21	- 6,583.31	0.00
		ACCOUNT NUMBER 65805900 350 0000 UNITS ACQUIRED ON 02/04/15	13,832 52			
		0				•

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