

EXTENSION ATTACHED

2949118103319 8

EXTENDED TO JUNE 15, 2018

## Return of Private Foundation

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

Form 990-PF

Department of the Treasury  
Internal Revenue ServiceDo 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](http://www.irs.gov/form990pf).

OMB No 1545-0052

2016

Open to Public Inspection

For calendar year 2016 or tax year beginning AUG 1, 2016, and ending JUL 31, 2017

Name of foundation  
**THE SAGER FAMILY TRAVELING FOUNDATION  
AND ROAD SHOW, INC.**

Number and street (or P.O. box number if mail is not delivered to street address)  
**151 TREMONT ST.**

Room/suite  
**21K**

City or town, state or province, country, and ZIP or foreign postal code  
**BOSTON, MA 02111**

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

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

I Fair market value of all assets at end of year (from Part II, col (c), line 16)  
**\$ 1,029,495.** (Part I, column (d) must be on cash basis)

J Accounting method:  
☒ Cash  
☐ Accrual  
☐ Other (specify)

A Employer identification number  
**04-3528688**

B Telephone number  
**617-542-4091**

C If exemption application is pending, check here ☐

D 1. Foreign organizations, check here ☐  
 2. Foreign organizations meeting the 85% test, check here and attach computation ☐

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

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).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1	Contributions, gifts, grants, etc., received	570,000.			
2	Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
3	Interest on savings and temporary cash investments				
4	Dividends and interest from securities				
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10				
b	Gross sales price for all assets on line 6a				
7	Capital gain net income (from Part IV, line 2)		0.		
8	Net short-term capital gain				
9	Income modifications				
10a	Gross sales less returns and allowances	355.			STATEMENT 1
b	Less: Cost of goods sold				
c	Gross profit or (loss)	355.		355.	
11	Other income				
12	Total. Add lines 1 through 11	570,355.	0.	355.	
13	Compensation of officers, directors, trustees, etc.	7,450.	0.	0.	7,450.
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees STMT 2	26,574.	0.	0.	26,574.
b	Accounting fees STMT 3	20,625.	0.	0.	10,313.
c	Other professional fees STMT 4	11,721.	0.	0.	11,721.
17	Interest				
18	Taxes STMT 5	3,667.	0.	0.	3,667.
19	Depreciation and depletion				
20	Occupancy				
21	Travel, conferences, and meetings	35,518.	0.	0.	35,518.
22	Printing and publications				
23	Other expenses STMT 6	30,635.	437.	0.	30,198.
24	Total operating and administrative expenses. Add lines 13 through 23	136,190.	437.	0.	125,441.
25	Contributions, gifts, grants paid	387,890.			387,890.
26	Total expenses and disbursements. Add lines 24 and 25	524,080.	437.	0.	513,331.
27	Subtract line 26 from line 12:				
a	Excess of revenue over expenses and disbursements	46,275.			
b	Net investment income (if negative, enter -0-)		0.		
c	Adjusted net income (if negative, enter -0-)			355.	

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<b>Part II Balance Sheets</b>		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
<b>Assets</b>	1 Cash - non-interest-bearing	40,062.	78,371.	78,371.
	2 Savings and temporary cash investments			
	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	149,609.	157,575.	308,550.
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock			
	c Investments - corporate bonds			
	<b>Liabilities</b>	11 Investments - land, buildings, and equipment basis ▶		
Less accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other				
14 Land, buildings, and equipment: basis ▶		7,609.		
Less accumulated depreciation STMT 7 ▶		7,609.		
15 Other assets (describe ▶ STATEMENT 8 )		642,574.	642,574.	642,574.
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		832,245.	878,520.	1,029,495.
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.		
<b>Net Assets or Fund Balances</b>	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	832,245.	878,520.	
30 Total net assets or fund balances	832,245.	878,520.		
31 Total liabilities and net assets/fund balances	832,245.	878,520.		

**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	832,245.
2 Enter amount from Part I, line 27a	2	46,275.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	878,520.
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	878,520.

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**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 NONE				
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			

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			

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

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

2	
3	

**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	545,966.	68,291.	7.994699
2014	905,823.	200,513.	4.517528
2013	783,507.	174,303.	4.495086
2012	775,039.	198,400.	3.906447
2011	616,178.	133,294.	4.622699

2 Total of line 1, column (d)	2	25.536459
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	5.107292
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	144,576.
5 Multiply line 4 by line 3	5	738,392.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	0.
7 Add lines 5 and 6	7	738,392.
8 Enter qualifying distributions from Part XII, line 4	8	513,331.

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.

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**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 <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		1	0.
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	0.
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	0.
6 Credits/Payments:			
a 2016 estimated tax payments and 2015 overpayment credited to 2016	6a		
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7		0.
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> 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		0.
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be: Credited to 2017 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11		

**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?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? 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.		X
c Did the foundation file Form 1120-POL for this year?		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		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		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) 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?	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	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <u>MA</u>		
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	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(i)(3) or 4942(i)(5) for calendar year 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

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**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)		<b>X</b>
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)		<b>X</b>
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <b>WWW.TEAMSAGER.ORG</b>	<b>X</b>	
14 The books are in care of ► <b>ROBERT SAGER</b> Telephone no. ► <b>617-542-4091</b> Located at ► <b>151 TREMONT STREET, NO. 21K, BOSTON, MA</b> ZIP+4 ► <b>02111</b>		
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	<input type="checkbox"/>	
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? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►	<b>X</b>	

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.	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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (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.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)? Organizations relying on a current notice regarding disaster assistance check here	<input type="checkbox"/>	<b>X</b>
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?		<b>X</b>
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? If "Yes," list the years ►	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
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.)	<b>N/A</b>	
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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)	<b>N/A</b>	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		<b>X</b>
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2016?		<b>X</b>

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**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)?

5b

X

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?

**SEE STATEMENT 10**

☒ 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

6b

X

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

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

7b

N/A

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

**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
SEE STATEMENT 9		7,450.	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

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

[illegible]

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0

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.

1	SCIENCE FOR MONKS - PROVIDE SCIENTIFIC EDUCATION TO TIBETAN MONKS & ENCOURAGE WORLDWIDE COOPERATION THROUGH THE TRANSFER OF SCIENTIFIC KNOWLEDGE THROUGH SEMINARS AND LECTURES.	218,793.
2	GREY'S REEF LIGHT - LIGHTHOUSE IN LAKE MICHIGAN FOR HISTORICAL PERSERVATION AND EDUCATIONAL PROGRAMMING	33,207.
3	BOOKS - PUBLISH PHOTOGRAPHY BOOKS THAT TELL INSPIRATIONAL STORIES. THESE BOOKS FURTHER THE FOUNDATION'S MISSION BY INSPIRING PEOPLE TO GET INVOLVED IN THE FOUNDATION'S CAUSES.	11,699.
4	SEE STATEMENT 11	1,435.

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

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.

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**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	0.
b Average of monthly cash balances		1b	146,778.
c Fair market value of all other assets		1c	
d Total (add lines 1a, b, and c)		1d	146,778.
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	146,778.
4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)		4	2,202.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4		5	144,576.
6 Minimum investment return. Enter 5% of line 5		6	7,229.

**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	7,229.
2a Tax on investment income for 2016 from Part VI, line 5	2a		
b Income tax for 2016. (This does not include the tax from Part VI.)	2b		
c Add lines 2a and 2b		2c	0.
3 Distributable amount before adjustments. Subtract line 2c from line 1		3	7,229.
4 Recoveries of amounts treated as qualifying distributions		4	0.
5 Add lines 3 and 4		5	7,229.
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	7,229.

**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	513,331.
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	513,331.
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	0.
6 Adjusted qualifying distributions. Subtract line 5 from line 4		6	513,331.

**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.

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

	(a) Corpus	(b) Years prior to 2015	(c) 2015	(d) 2016
<b>1</b> Distributable amount for 2016 from Part XI, line 7				7,229.
<b>2</b> Undistributed income, if any, as of the end of 2016				
<b>a</b> Enter amount for 2015 only			0.	
<b>b</b> Total for prior years:		0.		
<b>3</b> Excess distributions carryover, if any, to 2016:				
<b>a</b> From 2011	609,514.			
<b>b</b> From 2012	765,121.			
<b>c</b> From 2013	757,238.			
<b>d</b> From 2014	895,797.			
<b>e</b> From 2015	542,551.			
<b>f</b> Total of lines 3a through e	3,570,221.			
<b>4</b> Qualifying distributions for 2016 from Part XII, line 4: ▶ \$	513,331.			
<b>a</b> Applied to 2015, but not more than line 2a			0.	
<b>b</b> Applied to undistributed income of prior years (Election required - see instructions)		0.		
<b>c</b> Treated as distributions out of corpus (Election required - see instructions)	0.			
<b>d</b> Applied to 2016 distributable amount				7,229.
<b>e</b> Remaining amount distributed out of corpus	506,102.			
<b>5</b> Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5	4,076,323.			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b		0.		
<b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
<b>d</b> Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
<b>e</b> Undistributed income for 2015. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
<b>f</b> Undistributed income for 2016. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2017				0.
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
<b>8</b> Excess distributions carryover from 2011 not applied on line 5 or line 7	609,514.			
<b>9</b> Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	3,466,809.			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2012	765,121.			
<b>b</b> Excess from 2013	757,238.			
<b>c</b> Excess from 2014	895,797.			
<b>d</b> Excess from 2015	542,551.			
<b>e</b> Excess from 2016	506,102.			

## Page 10

N/A

- 4942(j)(3) or ☐ 4942(j)(5)

- (4) Gross investment income**

Form **990-PF** (2016)

**THE SAGER FAMILY TRAVELING FOUNDATION  
AND ROAD SHOW, INC.**

Form 990-PF (2016)

04-3528688 Page 11

**Part XV** **Supplementary Information** (continued)

<b>3 Grants and Contributions Paid During the Year or Approved for Future Payment</b>				
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
<b>a Paid during the year</b>				
BEARPAW POST OFFICE BOX 19 DEERFIELD, NH 03037		PC	GENERAL & UNRESTRICTED	500.
CNEWA 1011 FIRST AVENUE NEW YORK, NY 10022		PC	GENERAL & UNRESTRICTED	1,000.
DALAI LAMA CENTER FOR ETHICS 77 MASSACHUSETTS AVENUE CAMBRIDGE, MA 02139		PC	GENERAL & UNRESTRICTED	30,000.
FRIEZE FIND AT CHILDRENS HOSPITAL 800 BOYLSTON STREET BOSTON, MA 02199		PC	GENERAL & UNRESTRICTED	3,400.
INNOVATION AFRICA 520 8TH AVENUE, 15TH FLOOR NEW YORK, NY 10018		PC	GENERAL & UNRESTRICTED	1,800.
<b>Total</b>	<b>SEE CONTINUATION SHEET(S)</b>			<b>387,890.</b>
<b>b Approved for future payment</b>				
NONE				
<b>Total</b>				<b>0.</b>

Form 990-PF (2016)





**THE SAGER FAMILY TRAVELING FOUNDATION  
AND ROAD SHOW, INC.**

04-3528688

**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
INTERNATIONAL MEDICAL CORPS 12400 WILSHIRE BLVD., STE. 1500 LOS ANGELES, CA 90025		PC	GENERAL & UNRESTRICTED	50,000.
JEWISH COMMUNITY CENTERS 333 NAHANTON STREET NEWTON, MA 02461		PC	GENERAL & UNRESTRICTED	20,000.
LENNY ZAKIM FUND 33 ARCH STREET BOSTON, MA 02110		PC	GENERAL & UNRESTRICTED	25,000.
LIBRARY OF TIBETAN WORKS AND ARCHIVES GANGCHEN KYISHONG DHARAMSHALA, HIMACHAL PRADESH, INDIA 176215		NC	GENERAL & UNRESTRICTED	18,000.
LUNCHBOX FUND P.O. BOX 10 NEW YORK, NY 10276		PC	GENERAL & UNRESTRICTED	1,000.
MALDEN HIGH SCHOOL ALUMNI ASSOCIATION P.O. BOX 47 MALDEN, MA 02148		PC	SCHOLARSHIPS FOR STUDENTS	2,100.
MASSACHUSETTS GENERAL HOSPITAL 125 NASHUA STREET BOSTON, MA 02114		PC	GENERAL & UNRESTRICTED	20,000.
MASSACHUSETTS SPECIAL OLYMPICS 512 FOREST STREET MARLBOROUGH, MA 01752		PC	GENERAL & UNRESTRICTED	100.
NATIONAL PARKS CONSERVATION ASSOCIATION 777 6TH STREET NW., STE. 700 WASHINGTON, DC 20001-3723		PC	GENERAL & UNRESTRICTED	100.
ROUND UP RIVER RANCH PO BOX 8589 AVON, CO 81620		PC	GENERAL & UNRESTRICTED	360.
<b>Total from continuation sheets</b>				<b>351,190.</b>

**THE SAGER FAMILY TRAVELING FOUNDATION  
AND ROAD SHOW, INC.**

04-3528688

**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
SCIENCE FOR MONKS 968 LAWRENCE LANE PALO ALTO, CA 94303		PC	GENERAL & UNRESTRICTED	170,000.
SLC PAY IT FORWARD 2400 DISTRICT AVENUE BURLINGTON, MA 01803		PC	GENERAL & UNRESTRICTED	18,000.
SOUTHERN POVERTY LAW CENTER 400 WASHINGTON AVENUE MONTGOMERY, AL 36104		PC	GENERAL & UNRESTRICTED	50.
SYNERGOS INSTITUTE 3 EAST 54TH STREET NEW YORK, NY 10022		PC	GENERAL & UNRESTRICTED	24,500.
THE POLICE ASSISTED ADDICTION AND RECOVERY INITIATIVE 186 MAIN STREET GLOUCESTER, MA 01930		PC	GENERAL & UNRESTRICTED	1,030.
US MISSION 1286 UNIVERSITY AVENUE SAN DIEGO, CA 92103		PC	GENERAL & UNRESTRICTED	50.
WGBH ONE GUEST STREET BOSTON, MA 02135		PC	GENERAL & UNRESTRICTED	500.
WRITERS WITHOUT MARGINS 3 CONCORD AVE #34 CAMBRIDGE, MA 02138		PC	GENERAL & UNRESTRICTED	400.
<b>Total from continuation sheets</b>				

**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, or 990-PF) and  
its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No 1545-0047

**2016**

Name of the organization

THE SAGER FAMILY TRAVELING FOUNDATION  
AND ROAD SHOW, INC.

Employer identification number

04-3528688

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

- ☐ 501(c)( ) (enter number) organization
- ☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
- ☐ 527 political organization

Form 990-PF

- ☒ 501(c)(3) exempt private foundation
- ☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
- ☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.**Note:** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.**General Rule**

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

**Special Rules**

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. ▶ \$ \_\_\_\_\_

**Caution:** An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

**LHA** For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2016)



Name of organization  
**THE SAGER FAMILY TRAVELING FOUNDATION  
 AND ROAD SHOW, INC.**

Employer identification number

04-3528688

**Part I Contributors** (See instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	ROBERT AND ELAINE SAGER  151 TREMONT STREET, SUITE 21P  BOSTON, MA 02111	\$ 370,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
2	SHANE SAGER  151 TREMONT STREET, SUITE 21K  BOSTON, MA 02111	\$ 100,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
3	TESS SAGER  151 TREMONT STREET, SUITE 21K  BOSTON, MA 02111	\$ 100,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)



Name of organization

THE SAGER FAMILY TRAVELING FOUNDATION  
AND ROAD SHOW, INC.

Employer identification number

04-3528688

**Part III** Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year (Enter this info once) ▶ \$

Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

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FORM 990-PF	INCOME AND COST OF GOODS SOLD INCLUDED ON PART I, LINE 10	STATEMENT	1
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## INCOME

1. GROSS RECEIPTS . . . . .	355	
2. RETURNS AND ALLOWANCES . . . . .		
3. LINE 1 LESS LINE 2 . . . . .		355
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4. COST OF GOODS SOLD (LINE 15) . . . . .		
5. GROSS PROFIT (LINE 3 LESS LINE 4) . . . . .		355
<hr/>		
6. OTHER INCOME . . . . .		
7. GROSS INCOME (ADD LINES 5 AND 6) . . . . .		355
<hr/> <hr/>		

## COST OF GOODS SOLD

8. INVENTORY AT BEGINNING OF YEAR . . . . .	
9. MERCHANDISE PURCHASED. . . . .	
10. COST OF LABOR. . . . .	
11. MATERIALS AND SUPPLIES . . . . .	
12. OTHER COSTS. . . . .	
13. ADD LINES 8 THROUGH 12 . . . . .	
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14. INVENTORY AT END OF YEAR . . . . .	
15. COST OF GOODS SOLD (LINE 13 LESS LINE 14) . .	
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FORM 990-PF	LEGAL FEES	STATEMENT	2
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	26,574.	0.	0.	26,574.
TO FM 990-PF, PG 1, LN 16A	26,574.	0.	0.	26,574.

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FORM 990-PF	ACCOUNTING FEES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING SERVICES	20,625.	0.	0.	10,313.
TO FORM 990-PF, PG 1, LN 16B	20,625.	0.	0.	10,313.

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FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
IT SERVICES	10,971.	0.	0.	10,971.
OTHER PROFESSIONAL FEES	750.	0.	0.	750.
TO FORM 990-PF, PG 1, LN 16C	11,721.	0.	0.	11,721.

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FORM 990-PF	TAXES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAX EXPENSE	3,667.	0.	0.	3,667.
TO FORM 990-PF, PG 1, LN 18	3,667.	0.	0.	3,667.

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FORM 990-PF OTHER EXPENSES STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BANK CHARGES	437.	437.	0.	0.
FILING FEES	175.	0.	0.	175.
OFFICE EXPENSES/ SUPPLIES	513.	0.	0.	513.
INSURANCE	2,485.	0.	0.	2,485.
OTHER EXPENSES	9,072.	0.	0.	9,072.
CREDIT CARD PROCESSING FEES	1,012.	0.	0.	1,012.
DIGITAL SERVICES	5,000.	0.	0.	5,000.
STORAGE AND SHIPPING				
EXPENSES - HOPE BALLS	1,435.	0.	0.	1,435.
STORAGE AND SHIPPING				
EXPENSES - BOOKS	7,431.	0.	0.	7,431.
TELEPHONE	2,718.	0.	0.	2,718.
UTILITIES	357.	0.	0.	357.
TO FORM 990-PF, PG 1, LN 23	30,635.	437.	0.	30,198.

FORM 990-PF DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT STATEMENT 7

DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
EQUIPMENT	7,609.	7,609.	0.
TOTAL TO FM 990-PF, PART II, LN 14	7,609.	7,609.	0.

FORM 990-PF OTHER ASSETS STATEMENT 8

DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
BOSTON GARDEN FLOOR	331,100.	331,100.	331,100.
SAGER DESIGN COSTS	57,251.	57,251.	57,251.
SAGER GANZA MICROFINANCE	254,223.	254,223.	254,223.
TO FORM 990-PF, PART II, LINE 15	642,574.	642,574.	642,574.

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FORM 990-PF                      PART VIII - LIST OF OFFICERS, DIRECTORS                      STATEMENT      9  
    TRUSTEES AND FOUNDATION MANAGERS

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NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
ROBERT C. SAGER 151 TREMONT STREET, UNIT 21K BOSTON, MA 02111	PRESIDENT/DIRECTOR 10.00	0.	0.	0.
MICHAEL BYRNE 151 TREMONT STREET, UNIT 21K BOSTON, MA 02111	TREASURER/SECRETARY/DIRECTOR 10.00	7,450.	0.	0.
ELAINE SAGER 151 TREMONT STREET, UNIT 21K BOSTON, MA 02111	VICE PRESIDENT/DIRECTOR 10.00	0.	0.	0.
TESS SAGER 151 TREMONT STREET, UNIT 21K BOSTON, MA 02111	DIRECTOR 10.00	0.	0.	0.
SHANE SAGER 151 TREMONT STREET, UNIT 21K BOSTON, MA 02111	DIRECTOR 10.00	0.	0.	0.
MITCHELL COHEN 151 TREMONT STREET, UNIT 21K BOSTON, MA 02111	DIRECTOR 10.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		7,450.	0.	0.

FORM 990-PF

EXPENDITURE RESPONSIBILITY STATEMENT  
PART VII-B, LINE 5C

STATEMENT 10

GRANTEE'S NAME

LIBRARY OF TIBETAN WORKS AND ARCHIVES

GRANTEE'S ADDRESSDHARAMSALA  
HIMACHAL PRADESH, INDIAGRANT AMOUNTDATE OF GRANTAMOUNT EXPENDED

18,000.

11/02/16

18,000.

PURPOSE OF GRANTTO PRESERVE AND DISSEMINATE THE TIBETAN CULTURE, AS IT SERVES AS A CENTER  
FOR CULTURAL EDUCATION.DATES OF REPORTS BY GRANTEE

02/28/17

ANY DIVERSION BY GRANTEE

NO



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FORM 990-PF	SUMMARY OF DIRECT CHARITABLE ACTIVITIES	STATEMENT 11
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ACTIVITY FOUR

HOPE BALLS - THE FOUNDATION PARTNERS WITH ORGANIZATIONS, SUCH AS GRASSROOT SOCCER, ESPERANCE AND CAROLINA FOR KIBERA, WHERE CHILDREN FROM RESOURCE-POOR AREAS PARTICIPATES IN PROGRAMS THAT USE SOCCER AS A PLATFORM FOR TEACHING LIFE SKILLS. THE CHILDREN WOULD EARN THEIR SOCCER BALLS (HOPE BALLS) BY TRADING IN THEIR OLD, BEATEN UP BALLS.

EXPENSES

TO FORM 990-PF, PART IX-A, LINE 4

1,435.

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FORM 990-PF	PART XV - LINE 1A LIST OF FOUNDATION MANAGERS	STATEMENT 12
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NAME OF MANAGER

ROBERT C. SAGER  
ELAINE SAGER  
TESS SAGER  
SHANE SAGER

2016 DEPRECIATION AND AMORTIZATION REPORT

FORM 990-PF PAGE 1

990-PF

Asset No	Description	Date Acquired	Method	Life	Conv	Line No	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	* Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
1	EQUIPMENT	07/31/11	SL	5.00		16	7,609.				7,609.	7,609.		0.	7,609.
	* TOTAL 990-PF PG 1 DEPR						7,609.				7,609.	7,609.		0.	7,609.

628111 04-01-18

(D) - Asset disposed

\* ITC, Salvage, Bonus, Commercial Revitalization Deduction, GO Zone