

Form **990-PF**  
Department of the Treasury  
Internal Revenue Service

## Return of Private Foundation

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

- Do not enter social security numbers on this form as it may be made public.
- Information about Form 990-PF and its instructions is at [www.irs.gov/form990pf](http://www.irs.gov/form990pf).

2016

**Open to Public  
Inspection**

**For calendar year 2016, or tax year beginning 10-01-2016 , and ending 09-30-2017**

Name of foundation THE BURTON W RUDER FOUNDATION		<b>A Employer identification number</b> 36-3428676
Number and street (or P O box number if mail is not delivered to street address) 2238 EGANDALE ROAD		Room/suite
City or town, state or province, country, and ZIP or foreign postal code HIGHLAND PARK, IL 600352502		<b>B Telephone number (see instructions)</b> (847) 432-7755
<b>G Check all that apply</b> <div style="display: flex; justify-content: space-around;"> <input type="checkbox"/> Initial return           <input type="checkbox"/> Initial return of a former public charity         </div> <div style="display: flex; justify-content: space-around;"> <input type="checkbox"/> Final return           <input type="checkbox"/> Amended return         </div> <div style="display: flex; justify-content: space-around;"> <input type="checkbox"/> Address change           <input type="checkbox"/> Name change         </div>		<b>C If exemption application is pending, check here</b> ► <input type="checkbox"/>
<b>H Check type of organization</b> <div style="display: flex; justify-content: space-around;"> <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation           <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust           <input type="checkbox"/> Other taxable private foundation         </div>		<b>D 1. Foreign organizations, check here</b> ► <input type="checkbox"/> <b>2. Foreign organizations meeting the 85% test, check here and attach computation</b> ► <input type="checkbox"/>
<b>I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ► \$ 398,150</b>		<b>J Accounting method</b> <div style="display: flex; justify-content: space-around;"> <input checked="" type="checkbox"/> Cash           <input type="checkbox"/> Accrual         </div> <div style="display: flex; justify-content: space-around;"> <input type="checkbox"/> Other (specify) _____         </div> <p><i>(Part I, column (d) must be on cash basis)</i></p>
		<b>E If private foundation status was terminated under section 507(b)(1)(A), check here</b> ► <input type="checkbox"/> <b>F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here</b> ► <input type="checkbox"/>

## Part I

## **Analysis of Revenue and Expenses** (*The total*)

*of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions) )*

(a)	Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
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Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)			
	2	Check ► <input checked="" type="checkbox"/> if the foundation is <b>not</b> required to attach Sch. B			
	3	Interest on savings and temporary cash investments	19	19	
	4	Dividends and interest from securities	5,546	5,546	
	5a	Gross rents			
	b	Net rental income or (loss)			
	6a	Net gain or (loss) from sale of assets not on line 10	12,920		
	b	Gross sales price for all assets on line 6a	24,566		
	7	Capital gain net income (from Part IV, line 2)		12,920	
	8	Net short-term capital gain			
	9	Income modifications			
	10a	Gross sales less returns and allowances			
b	Less Cost of goods sold				
c	Gross profit or (loss) (attach schedule)				
11	Other income (attach schedule)				
12	<b>Total.</b> Add lines 1 through 11	18,485	18,485		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	0	0	0
	14	Other employee salaries and wages			
	15	Pension plans, employee benefits			
	16a	Legal fees (attach schedule)	618	309	309
	b	Accounting fees (attach schedule)	2,300	0	2,300
	c	Other professional fees (attach schedule)			
	17	Interest			
	18	Taxes (attach schedule) (see instructions)	315	0	15
	19	Depreciation (attach schedule) and depletion			
	20	Occupancy			
	21	Travel, conferences, and meetings			
	22	Printing and publications			
	23	Other expenses (attach schedule)	10	0	10
	24	<b>Total operating and administrative expenses.</b>			
	Add lines 13 through 23	3,243	309	2,634	
25	Contributions, gifts, grants paid	19,208		19,208	
26	<b>Total expenses and disbursements.</b> Add lines 24 and 25	22,451	309	21,842	
27	Subtract line 26 from line 12				
a	<b>Excess of revenue over expenses and disbursements</b>	-3,966			
b	<b>Net investment income</b> (if negative, enter -0-)		18,176		
c	<b>Adjusted net income</b> (if negative, enter -0-)				

	<b>Part II Balance Sheets</b>	Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions )	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
	<b>1</b> Cash—non-interest-bearing . . . . .		10,021	7,452	7,452
	<b>2</b> Savings and temporary cash investments . . . . .				
	<b>3</b> Accounts receivable ►				
	Less allowance for doubtful accounts ►				
	<b>4</b> Pledges receivable ►				
	Less allowance for doubtful accounts ►				
	<b>5</b> Grants receivable . . . . .				
	<b>6</b> Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .				
	<b>7</b> Other notes and loans receivable (attach schedule) ►				
	Less allowance for doubtful accounts ►				
	<b>8</b> Inventories for sale or use . . . . .				
	<b>9</b> Prepaid expenses and deferred charges . . . . .				
	<b>10a</b> Investments—U S and state government obligations (attach schedule)				
	<b>b</b> Investments—corporate stock (attach schedule) . . . . .	134,805		136,559	241,064
	<b>c</b> Investments—corporate bonds (attach schedule) . . . . .	47,950		44,950	149,634
	<b>11</b> Investments—land, buildings, and equipment basis ►				
	Less accumulated depreciation (attach schedule) ►				
	<b>12</b> Investments—mortgage loans . . . . .				
	<b>13</b> Investments—other (attach schedule) . . . . .				
	<b>14</b> Land, buildings, and equipment basis ►				
	Less accumulated depreciation (attach schedule) ►				
	<b>15</b> Other assets (describe ► _____)				
	<b>16</b> <b>Total assets</b> (to be completed by all filers—see the instructions Also, see page 1, item I)	192,776		188,961	398,150
	<b>17</b> Accounts payable and accrued expenses . . . . .				
	<b>18</b> Grants payable. . . . .				
	<b>19</b> Deferred revenue . . . . .				
	<b>20</b> Loans from officers, directors, trustees, and other disqualified persons				
	<b>21</b> Mortgages and other notes payable (attach schedule) . . . . .				
	<b>22</b> Other liabilities (describe ► _____)	200		0	
	<b>23</b> <b>Total liabilities</b> (add lines 17 through 22) . . . . .	200		0	
	<b>Foundations that follow SFAS 117, check here ► <input type="checkbox"/></b> <b>and complete lines 24 through 26 and lines 30 and 31.</b>				
	<b>24</b> Unrestricted . . . . .				
	<b>25</b> Temporarily restricted . . . . .				
	<b>26</b> Permanently restricted . . . . .				
	<b>Foundations that do not follow SFAS 117, check here ► <input checked="" type="checkbox"/></b> <b>and complete lines 27 through 31.</b>				
	<b>27</b> Capital stock, trust principal, or current funds . . . . .	238,643		238,643	
	<b>28</b> Paid-in or capital surplus, or land, bldg , and equipment fund	0		0	
	<b>29</b> Retained earnings, accumulated income, endowment, or other funds	-46,067		-49,682	
	<b>30</b> <b>Total net assets or fund balances</b> (see instructions) . . . . .	192,576		188,961	
	<b>31</b> <b>Total liabilities and net assets/fund balances</b> (see instructions) .	192,776		188,961	

**Part III Analysis of Changes in Net Assets or Fund Balances**

<b>1</b> 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	192,576
<b>2</b> Enter amount from Part I, line 27a . . . . .	2	-3,966
<b>3</b> Other increases not included in line 2 (itemize) ►	3	351
<b>4</b> Add lines 1, 2, and 3 . . . . .	4	188,961
<b>5</b> Decreases not included in line 2 (itemize) ►	5	0
<b>6</b> Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	188,961

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)			(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
<b>1 a</b> ISHARES CORE S&P MIDCAP			P	2009-05-18	2016-10-24
<b>b</b> ISHARES CORE S&P MIDCAP			P	2009-05-18	2017-01-19
<b>c</b> ISRAEL BONDS			P	2011-01-18	2017-05-02
<b>d</b> ISHARES CORE S&P SMALLCAP			P	2009-05-18	2017-07-26
<b>e</b> CAPITAL GAINS DIVIDENDS			P		
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)		
<b>a</b> 7,179		3,211	3,968		
<b>b</b> 60		19	41		
<b>c</b> 5,400		5,400	0		
<b>d</b> 10,046		3,016	7,030		
<b>e</b> 1,881			1,881		
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))		
<b>a</b>			3,968		
<b>b</b>			41		
<b>c</b>			0		
<b>d</b>			7,030		
<b>e</b>			1,881		
<b>2</b> 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		<b>2</b>	12,920	
<b>3</b> 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) (see instructions) If (loss), enter -0- in Part I, line 8	. . . . .			<b>3</b>	

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

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

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

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

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

 Yes  No

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2015	19,783	344,974	0 057346
2014	22,425	383,395	0 058491
2013	21,056	391,169	0 053828
2012	17,635	343,297	0 051370
2011	16,716	316,608	0 052797
<b>2</b> Total of line 1, column (d)			<b>2</b> 0 273832
<b>3</b> Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years			<b>3</b> 0 054766
<b>4</b> Enter the net value of noncharitable-use assets for 2016 from Part X, line 5			<b>4</b> 390,113
<b>5</b> Multiply line 4 by line 3			<b>5</b> 21,365
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)			<b>6</b> 182
<b>7</b> Add lines 5 and 6			<b>7</b> 21,547
<b>8</b> Enter qualifying distributions from Part XII, line 4			<b>8</b> 21,842

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ► <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)	1	182
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ► <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		
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	182
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	0
5	<b>Tax based on investment income.</b> Subtract line 4 from line 3 If zero or less, enter -0-	5	182
6	Credits/Payments		
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a	216
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	216
8	Enter any <b>penalty</b> for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached	8	
9	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b>	9	
10	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b>	10	34
11	Enter the amount of line 10 to be <b>Credited to 2017 estimated tax</b> ►	34	Refunded ►
		11	0

**Part VII-A Statements Regarding Activities**

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	Yes	No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)?	1b	Yes	No
	<i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities</i>			
c	Did the foundation file <b>Form 1120-POL</b> for this year?	1c	Yes	No
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? <i>If "Yes," attach a detailed description of the activities</i>	2	Yes	No
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? <i>If "Yes," attach a conformed copy of the changes</i>	3	Yes	No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	Yes	No
b	If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year?	4b	Yes	No
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T</i>	5	Yes	No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	No
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	7	Yes	No
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ► IL			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation</i>	8b	Yes	No
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>	9	Yes	No
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	10	Yes	No

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

11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions). 11 No

12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions). 12 No

13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? 13 Yes

Website address ►N/A

14 The books are in care of ►BURTON RUDER Telephone no ►(847) 432-7755

Located at ►2238 EGANDALE HIGHLAND PARK IL

ZIP+4 ►60035

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** —Check here and enter the amount of tax-exempt interest received or accrued during the year. ► 15 □

16 At any time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? 16 Yes No

See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR). If "Yes", enter the name of the foreign country ►

**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.**

1a During the year did the foundation (either directly or indirectly)

(1) Engage in the sale or exchange, or leasing of property with a disqualified person?  Yes  No

(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  Yes  No

(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  Yes  No

(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  Yes  No

(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?  Yes  No

(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days).  Yes  No

b If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here. ►

c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2016? 1c No

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 ► 20\_\_\_\_, 20\_\_\_\_, 20\_\_\_\_, 20\_\_\_\_  Yes  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) 2b

c If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ► 20\_\_\_\_, 20\_\_\_\_, 20\_\_\_\_, 20\_\_\_\_

3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?  Yes  No

b If "Yes," did it have excess business holdings in 2016 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2016). 3b

4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4a No

b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2016? 4b No

**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)? . . . . . 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? . . . . .  Yes  No  
*If "Yes," attach the statement required by Regulations section 53.4945-5(d)*

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? . . . . .  Yes  No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? . . . . . If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  Yes  No

b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?  Yes  No

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).**

List all officers, directors, trustees, foundation managers and their compensation (see instructions).				
(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
BURTON RUDER 2238 EGANDALE ROAD HIGHLAND PARK, IL 60035	PRESIDENT, TRES & DIR 0 10	0	0	0
LINDA RUDER 2238 EGANDALE ROAD HIGHLAND PARK, IL 60035	SECRETARY & DIRECTOR 0 10	0	0	0

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

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

6

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**
**3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services. . . . . ► 0

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

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

**Expenses**

1	
2	
3	
4	

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

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

**Amount**

1	
2	
All other program-related investments. See instructions	
3	

**Total.** Add lines 1 through 3 . . . . . ► 0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities. . . . .	1a	379,531
b	Average of monthly cash balances. . . . .	1b	16,523
c	Fair market value of all other assets (see instructions). . . . .	1c	0
d	<b>Total</b> (add lines 1a, b, and c). . . . .	1d	396,054
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	396,054
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions). . . . .	4	5,941
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3 Enter here and on Part V, line 4	5	390,113
6	<b>Minimum investment return.</b> Enter 5% of line 5. . . . .	6	19,506

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

1	Minimum investment return from Part X, line 6. . . . .	1	19,506
2a	Tax on investment income for 2016 from Part VI, line 5. . . . .	2a	182
b	Income tax for 2016 (This does not include the tax from Part VI). . . . .	2b	
c	Add lines 2a and 2b. . . . .	2c	182
3	Distributable amount before adjustments Subtract line 2c from line 1. . . . .	3	19,324
4	Recoveries of amounts treated as qualifying distributions. . . . .	4	0
5	Add lines 3 and 4. . . . .	5	19,324
6	Deduction from distributable amount (see instructions). . . . .	6	0
7	<b>Distributable amount</b> as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1. . . . .	7	19,324

**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	21,842
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	<b>Qualifying distributions.</b> Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	21,842
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions). . . . .	5	182
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4. . . . .	6	21,660
<b>Note:</b> The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years			

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

	(a) Corpus	(b) Years prior to 2015	(c) 2015	(d) 2016
<b>1</b> Distributable amount for 2016 from Part XI, line 7				19,324
<b>2</b> Undistributed income, if any, as of the end of 2016			0	
<b>a</b> Enter amount for 2015 only. . . . .			0	
<b>b</b> Total for prior years 20____, 20____, 20____		0		
<b>3</b> Excess distributions carryover, if any, to 2016				
<b>a</b> From 2011. . . . .				
<b>b</b> From 2012. . . . .				
<b>c</b> From 2013. . . . .				
<b>d</b> From 2014. . . . .				
<b>e</b> From 2015. . . . .	2,270			
<b>f</b> <b>Total</b> of lines 3a through e. . . . .	2,270			
<b>4</b> Qualifying distributions for 2016 from Part XII, line 4 ► \$ 21,842			0	
<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. . . . .				19,324
<b>e</b> Remaining amount distributed out of corpus	2,518			
<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> <b>Enter the net total of each column as indicated below:</b>				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5	4,788			
<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 instructions . . . . .			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 (see instructions) . . . . .	0			
<b>9</b> <b>Excess distributions carryover to 2017.</b> Subtract lines 7 and 8 from line 6a. . . . .	4,788			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2012. . . . .				
<b>b</b> Excess from 2013. . . . .				
<b>c</b> Excess from 2014. . . . .				
<b>d</b> Excess from 2015. . . . .	2,270			
<b>e</b> Excess from 2016. . . . .	2,518			

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

1a	If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2016, enter the date of the ruling. ►			
b	Check box to indicate whether the organization is a private operating foundation described in section <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 4942(j)(5)			
2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.			
b	85% of line 2a.			
c	Qualifying distributions from Part XII, line 4 for each year listed.			
d	Amounts included in line 2c not used directly for active conduct of exempt activities.			
e	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c.			
3	Complete 3a, b, or c for the alternative test relied upon			
a	"Assets" alternative test—enter			
(1)	Value of all assets.			
(2)	Value of assets qualifying under section 4942(j)(3)(B)(i)			
b	"Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.			
c	"Support" alternative test—enter			
(1)	Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties).			
(2)	Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(III).			
(3)	Largest amount of support from an exempt organization			
(4)	Gross investment income			

**Part XV Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see instructions.)****1 Information Regarding Foundation Managers:**

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

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

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

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

a The name, address, and telephone number or email address of the person to whom applications 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, such as by geographical areas, charitable fields, kinds of institutions, or other factors

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

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

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions )
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
<b>1 Program service revenue</b>					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
<b>g Fees and contracts from government agencies</b>					
<b>2 Membership dues and assessments.</b>					
<b>3 Interest on savings and temporary cash investments</b>			14	19	
<b>4 Dividends and interest from securities.</b>			14	5,546	
<b>5 Net rental income or (loss) from real estate</b>					
a Debt-financed property.					
b Not debt-financed property.					
<b>6 Net rental income or (loss) from personal property</b>					
<b>7 Other investment income.</b>					
<b>8 Gain or (loss) from sales of assets other than inventory</b>			18	12,920	
<b>9 Net income or (loss) from special events</b>					
<b>10 Gross profit or (loss) from sales of inventory</b>					
<b>11 Other revenue a</b>					
b _____					
c _____					
d _____					
e _____					
<b>12 Subtotal Add columns (b), (d), and (e).</b>		0		18,485	
<b>13 Total. Add line 12, columns (b), (d), and (e).</b>			13		18,485

(See worksheet in line 13 instructions to verify calculations )

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



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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<i>a Paid during the year</i>				
ALZHEIMERS ASSOCIATION PO BOX 806457 CHICAGO, IL 60680	NONE	PC	ARTISTIC, SOCIAL AND EDUCATION PURPOSES	1,250
AMERI CARES 88 HAMILTON AVE STAMFORD, CT 06902	NONE	PC	ARTISTIC, SOCIAL AND EDUCATION SERVICES	500
AMERICAN FRIENDS OF MAGEN DAVID ADOM 352 SEVENTH AVE SUITE 400 NEW YORK, NY 10001	NONE	PC	ARTISTIC, SOCIAL AND EDUCATION SERVICES	250
AMERICAN JEWISH COMMITTEE 55 E MONROE SUITE 2930 CHICAGO, IL 60603	NONE	PC	ARTISTIC, SOCIAL AND EDUCATION SERVICES	250
AMERICAN JEWISH JOINT DISTRIBUTION COMMITTEE 711 THIRD AVE NEW YORK, NY 10017	NONE	PC	ARTISTIC, SOCIAL AND EDUCATION SERVICES	250
<b>Total . . . . .</b>				19,208
<b>3a</b>				

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a Paid during the year</b>				
AMERICAN JEWISH WORLD SERVICE PO BOX 568 ETNA, NH 03750	NONE	PC	ARTISTIC, SOCIAL AND EDUCATION SERVICES	250
AMERICAN TINNITUS PO BOX 5 PORTLAND, OR 97207	NONE	PC	ARTISTIC, SOCIAL AND EDUCATION SERVICES	250
ART INSTITUTE OF CHICAGO 111 S MICHIGAN AVE CHICAGO, IL 60603	NONE	PC	ARTISTIC, SOCIAL AND EDUCATION SERVICES	140
CARE PO BOX 1871 MERRIFIELD, VA 22116	NONE	PC	ARTISTIC, SOCIAL AND EDUCATION PURPOSES	100
CENTER FOR ENRICHED LIVING 280 SAUNDERS ROAD RIVERWOODS, IL 60015	NONE	PC	ARTISTIC, SOCIAL AND EDUCATION PURPOSES	250
<b>Total . . . . .</b>	►			19,208
<b>3a</b>				

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a Paid during the year</b>				
CHICAGO BOTANIC GARDENS 1000 LAKE COOK ROAD GLENCOE, IL 60022	NONE	PC	ARTISTIC, SOCIAL AND EDUCATION PURPOSES	240
CHICAGO LIGHTHOUSE FOR THE BLIND 1850 W ROOSEVELT RD CHICAGO, IL 60608	NONE	PC	ARTISTIC, SOCIAL AND EDUCATION SERVICES	225
DOCTORS WITHOUT BORDERS 273 DEARBORN CT GENEVA, IL 60134	NONE	PC	ARTISTIC, SOCIAL AND EDUCATION SERVICES	500
FEEDING AMERICA 35 E WACKER DRIVE SUITE 2000 CHICAGO, IL 60601	NONE	PC	ARTISTIC, SOCIAL AND EDUCATION PURPOSES	250
HAND IN HAND HURRICANE RELIEF 488 MADISON AVE 10TH FLOOR NEW YORK, NY 10022	NONE	PC	ARTISTIC, SOCIAL AND EDUCATION PURPOSES	500
<b>Total . . . . .</b>				19,208
<b>3a</b>				

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a Paid during the year</b>				
JAC EDUCATION FOUNDATION PO BOX 541 HIGHLAND PARK, IL 60035	NONE	PC	ARTISTIC, SOCIAL AND EDUCATION SERVICES	1,000
JEWISH UNITED FUND 30 S WELLS ST CHICAGO, IL 60606	NONE	PC	ARTISTIC, SOCIAL AND EDUCATION PURPOSES	6,000
JEWSIH NATIONAL FUND 78 RANDALL AVENUE ROCKVILLE CENTER, NY 11570	NONE	PC	ARTISTIC, SOCIAL AND EDUCATION PURPOSES	608
LURIE'S CHILDREN'S FOUNDATOIN 225 E CHICAGO AVENUE CHICAGO, IL 60611	NONE	PC	ARTISTIC, SOCIAL AND EDUCATION SERVICES	1,000
MACC FUND SKI FOR CANCER 10000 W INNOVATION DR SUITE 135 MILWAUKEE, WI 53226	NONE	PC	ARTISTIC, SOCIAL AND EDUCATION SERVICES	250
<b>Total . . . . .</b>			►	19,208
<b>3a</b>				

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a Paid during the year</b>				
MACCABI USA 1511 WALNUT STREET SUITE 401 PHILADELPHIA, PA 19102	NONE	PC	ARTISTIC, SOCIAL AND EDUCATION SERVICES	150
MARWEN 833 N ORLEANS STREET CHICAGO, IL 60610	NONE	PC	ARTISTIC, SOCIAL AND EDUCATION PURPOSES	250
MICHAEL J FOX FOUNDATION PO BOX 4777 NEW YORK, NY 10163	NONE	PF	ARTISTIC, SOCIAL AND EDUCATION SERVICES	500
MOVE FOR HUNGER 814 ASBURY AVE ASBURY PARK, NJ 07712	NONE	PC	ARTISTIC, SOCIAL AND EDUCATION SERVICES	250
MUSEUM OF CONTEMPORARY ART 220 EAST CHICAGO AVENUE CHICAGO, IL 60611	NONE	PC	ARTISTIC, SOCIAL AND EDUCATION SERVICES	320
<b>Total . . . . . ►</b>				19,208
<b>3a</b>				

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a Paid during the year</b>				
NORTH SHORE AUXILLARY 216 W JACKSONBLVD STE 800 CHICAGO, IL 60606	NONE	PC	ARTISTIC, SOCIAL AND EDUCATION PURPOSES	75
PLANNED PARENTHOOD 18 S MICHIGAN AVE 6TH FLOOR CHICAGO, IL 60603	NONE	PC	ARTISTIC, SOCIAL AND EDUCATION SERVICES	250
RETT SYNDROME RESEARCH CHARITY 3935 W 26TH STREET CHICAGO, IL 60623	NONE	PC	ARTISTIC, SOCIAL AND EDUCATION SERVICES	250
ROLFE FOUNDATION 4809 N RAVENSWOOD SUITE 326 CHICAGO, IL 60640	NONE	PC	ARTISTIC, SOCIAL AND EDUCATION SERVICES	250
SAVE THE CHILDREN 500 KINGS HIGHEAY EAST SUITE 400 FAIRFIELD, CT 06825	NONE	PC	ARTISTIC, SOCIAL AND EDUCATION SERVICES	500
<b>Total . . . . .</b>				19,208
<b>3a</b>				

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a Paid during the year</b>				
SIERRA CLUB FOUNDATION 21001 WEBSTER STREET SUITE 1250 OAKLAND, CA 94612	NONE	PC	ARTISTIC, SOCIAL AND EDUCATION SERVICES	100
SOUTHERN POVERTY LAW CENTER PO BOX 548 MONTGOMERY, AL 63101	NONE	PC	ARTISTIC, SOCIAL AND EDUCATION SERVICES	500
THE ALS ASSOCIATION PO BOX 6051 ALBERT LEA, MN 56007	NONE	PC	ARTISTIC, SOCIAL AND EDUCATION SERVICES	100
WITS FOUNDATION 27 EAST MONROE SUITE 1400 CHICAGO, IL 60603	NONE	PC	ARTISTIC, SOCIAL AND EDUCATION SERVICES	300
WOUNDED WARRIOR PROJECT 4899 BELFORT ROAD SUITE 300 JACKSONVILLE, FL 32256	NONE	PC	ARTISTIC, SOCIAL AND EDUCATION SERVICES	500
<b>Total . . . . .</b>				19,208
<b>3a</b>				

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a Paid during the year</b>				
WOUNDED WARRIOR PROJECT - FAMILY SUPPORT 920 S 107TH AVENUE SUITE 250 OMAHA, NE 68114	NONE	PC	ARTISTIC, SOCIAL AND EDUCATION SERVICES	750
YOUTH AND OPPORTUNITY UNITED 1027 SHERMAN AVENUE EVANSTON, IL 60202	NONE	PC	ARTISTIC, SOCIAL AND EDUCATION SERVICES	100
<b>Total . . . . .</b>			►	19,208
<b>3a</b>				

## TY 2016 Accounting Fees Schedule

**Name:** THE BURTON W RUDER FOUNDATION**EIN:** 36-3428676

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CLIFTONLARSONALLEN LLP	2,300	0		2,300

## TY 2016 Investments Corporate Bonds Schedule

**Name:** THE BURTON W RUDER FOUNDATION

**EIN:** 36-3428676

<b>Name of Bond</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
ISRAEL BONDS	2,000	2,602
OAKMARK GLOBAL	42,950	147,032

**TY 2016 Investments Corporate Stock Schedule****Name:** THE BURTON W RUDER FOUNDATION**EIN:** 36-3428676

<b>Name of Stock</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
OAKMARK EQUITY INCOME	50,678	79,439
ISHARES S&P MIDCAP	20,300	65,376
ISHARES S&P SMALLCAP	10,947	37,992
MSCI EAFE INDEX FUND	14,500	16,983
BLACKROCK STRAT. INCOME	40,134	41,274

## TY 2016 Legal Fees Schedule

**Name:** THE BURTON W RUDER FOUNDATION**EIN:** 36-3428676

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
PANTER DAWN & ASSOCIATES	618	309		309

## TY 2016 Other Expenses Schedule

**Name:** THE BURTON W RUDER FOUNDATION  
**EIN:** 36-3428676

## Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MISCELLANEOUS EXPENSES	10	0		10

## TY 2016 Other Increases Schedule

**Name:** THE BURTON W RUDER FOUNDATION

**EIN:** 36-3428676

Description	Amount
PRIOR PERIOD ADJUSTMENT	351

## TY 2016 Other Liabilities Schedule

**Name:** THE BURTON W RUDER FOUNDATION**EIN:** 36-3428676

<b>Description</b>	<b>Beginning of Year - Book Value</b>	<b>End of Year - Book Value</b>
CONTRIBUTIONS IN TRANSIT	200	0

## TY 2016 Taxes Schedule

**Name:** THE BURTON W RUDER FOUNDATION**EIN:** 36-3428676

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
IL CHARITY BUREAU FUND	15	0		15
INTERNAL REVENUE SERVICE	300	0		0