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Form **990-PF**

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

OMB No 1545-0052

2017

Department of the Treasury
Internal Revenue Service

▶ Do not enter social security numbers on this form as it may be made public.
▶ Go to www.irs.gov/Form990PF for instructions and the latest information.

Open to Public Inspection

For calendar year 2017 or tax year beginning , and ending

Name of foundation
BEN D. SPAGOLIO CHARITABLE TRUST
C/O JAMES C. BOHORAD, TRUSTEE

Employer identification number
13-7345617

Number and street (or P O box number if mail is not delivered to street address)
1940 W. NORWEGIAN ST., PO BOX 1280

Room/suite
6

Telephone number (see instructions)
570-622-1811

City or town, state or province, country, and ZIP or foreign postal code
POTTSVILLE PA 17901-7280

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

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

Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ **292,225**

Accounting method
 Cash
 Accrual
 Other (specify)

Other information:
 E 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) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)	4,000			
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	520	520		
	4 Dividends and interest from securities	6,258	6,258		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	57,739			
	b Gross sales price for all assets on line 6a	290,442			
	7 Capital gain net income (from Part IV, line 2)		57,739		
	8 Net short-term capital gain			0	
	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 Total. Add lines 1 through 11	68,517	64,517	0		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule) STMT 1	1,610			
	c Other professional fees (attach schedule) STMT 2	641			
	17 Interest				
	18 Taxes (attach schedule) (see instructions) STMT 3	147			
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
22 Printing and publications					
23 Other expenses (att sch) STMT 4	138				
24 Total operating and administrative expenses. Add lines 13 through 23	2,536	0	0	0	
25 Contributions, gifts, grants paid	11,575			11,575	
26 Total expenses and disbursements. Add lines 24 and 25	14,111	0	0	11,575	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	54,406				
b Net investment income (if negative, enter -0-)		64,517			
c Adjusted net income (if negative, enter -0-)			0		

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Part II	Balance Sheets	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
Assets	1	Cash – non-interest-bearing		307	307
	2	Savings and temporary cash investments	2,919	50,038	50,038
	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 (attach schedule) (see instructions)			
	7	Other notes and loans receivable (att schedule) ▶ Less allowance for doubtful accounts ▶	0		
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments – U S and state government obligations (attach schedule)			
	b	Investments – corporate stock (attach schedule) SEE STMT 5	229,894	236,874	241,880
	c	Investments – corporate bonds (attach schedule)			
	11	Investments – land, buildings, and equipment basis ▶ Less accumulated depreciation (attach sch) ▶			
	12	Investments – mortgage loans			
	13	Investments – other (attach schedule)			
	14	Land, buildings, and equipment basis ▶ Less accumulated depreciation (attach sch) ▶			
15	Other assets (describe ▶)				
16	Total assets (to be completed by all filers – see the instructions Also, see page 1, item I)	232,813	287,219	292,225	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ▶ <input type="checkbox"/>				
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input checked="" type="checkbox"/>				
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg, and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	232,813	287,219	
30	Total net assets or fund balances (see instructions)	232,813	287,219		
31	Total liabilities and net assets/fund balances (see instructions)	232,813	287,219		

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	232,813
2	Enter amount from Part I, line 27a	2	54,406
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	287,219
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 30	6	287,219

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, 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	WADDELL & REED CAP GAIN DIST			
b	AMERICAN FUNDS			
c	PUBLICLY TRADED SECURITIES			
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	7,445		7,445	
b				
c	282,997	232,703	50,294	
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				(i) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any		
a			7,445	
b				
c			50,294	
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]		2	57,739
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) See instructions If (loss), enter -0- in Part I, line 8]		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))
2016	14,488	264,531	0.054769
2015	12,696	267,358	0.047487
2014	11,495	270,849	0.042441
2013	10,418	244,411	0.042625
2012	11,713	223,738	0.052351
2	Total of line 1, column (d)		0.239673
3	Average distribution ratio for the 5-year base period - divide the total on line 2 by 5 0, or by the number of years the foundation has been in existence if less than 5 years		0.047935
4	Enter the net value of noncharitable-use assets for 2017 from Part X, line 5		268,501
5	Multiply line 4 by line 3		12,871
6	Enter 1% of net investment income (1% of Part I, line 27b)		645
7	Add lines 5 and 6		13,516
8	Enter qualifying distributions from Part XII, line 4 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		11,575

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	1,290
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	1,290
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	1,290
6	Credits/Payments		
a	2017 estimated tax payments and 2016 overpayment credited to 2017	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	
8	Enter any penalty for underpayment of estimated tax Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	3
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	1,293
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 2018 estimated tax Refunded	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
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the 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 <input type="checkbox"/> \$ _____ (2) On foundation managers <input type="checkbox"/> \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____		
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 PA		
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(j)(3) or 4942(j)(5) for calendar year 2017 or the taxable year beginning in 2017? 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

2

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		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement See instructions		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ N/A	X	
14 The books are in care of ▶ JAMES C. BOHORAD Telephone no ▶ 570-622-1811 P.O. BOX 1280 Located at ▶ POTTSVILLE PA ZIP+4 ▶ 17901-7280		
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 2017, 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 ▶		X

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) <ul style="list-style-type: none"> (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 type="checkbox"/> Yes <input checked="" 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		N/A
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 2017?		N/A
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)) <ul style="list-style-type: none"> a At the end of tax year 2017, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2017? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ 20 , 20 , 20 , 20 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) 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If "Yes," did it have excess business holdings in 2017 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 2017)		N/A
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2017?		X

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

5a During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? Yes No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? Yes No

(3) Provide a grant to an individual for travel, study, or other similar purposes? Yes No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions Yes No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? Yes No

b If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions Yes No **N/A** **5b**

Organizations relying on a current notice regarding disaster assistance, check here

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? **N/A** Yes No

If "Yes," attach the statement required by Regulations section 53.4945–5(d)

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

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? Yes No **6b** **X**

If "Yes" to 6b, file Form 8870

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

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? Yes No **N/A** **7b**

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

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

(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
JAMES C BOHORAD P.O. BOX 1280	POTTSVILLE PA 17901-7280	TRUSTEE 2.00	0	0

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
NONE				

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

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

3 Five highest-paid independent contractors for professional services. 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 ▶

Part IX-A Summary of Direct Charitable Activities

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

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

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 ▶	

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	202,137
b	Average of monthly cash balances	1b	70,453
c	Fair market value of all other assets (see instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	272,590
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	272,590
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	4,089
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	268,501
6	Minimum investment return. Enter 5% of line 5	6	13,425

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	13,425
2a	Tax on investment income for 2017 from Part VI, line 5	2a	1,290
b	Income tax for 2017 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	1,290
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	12,135
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	12,135
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	12,135

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	11,575
b	Program-related investments – total from Part IX-B	1b	
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	11,575
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	11,575

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2016	(c) 2016	(d) 2017
1 Distributable amount for 2017 from Part XI, line 7				12,135
2 Undistributed income, if any, as of the end of 2017				
a Enter amount for 2016 only			11,552	
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2017				
a From 2012				
b From 2013				
c From 2014				
d From 2015				
e From 2016				
f Total of lines 3a through e				
4 Qualifying distributions for 2017 from Part XII, line 4 ▶ \$ <u>11,575</u>				
a Applied to 2016, but not more than line 2a			11,552	
b Applied to undistributed income of prior years (Election required – see instructions)				
c Treated as distributions out of corpus (Election required – see instructions)				
d Applied to 2017 distributable amount				23
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2017 (If an amount appears in column (d), the 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				
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount – see instructions				
e Undistributed income for 2016 Subtract line 4a from line 2a Taxable amount – see instructions				
f Undistributed income for 2017 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2018				12,112
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)				
8 Excess distributions carryover from 2012 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9				
a Excess from 2013				
b Excess from 2014				
c Excess from 2015				
d Excess from 2016				
e Excess from 2017				

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 2017, enter the date of the ruling ▶

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

2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

	Tax year				(e) Total
	(a) 2017	(b) 2016	Prior 3 years		
			(c) 2015	(d) 2014	
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test – enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test – enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test – enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

- 1 Information Regarding Foundation Managers:**
- a** List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))
N/A
- 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
N/A
- 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., to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions.
- a** The name, address, and telephone number or email address of the person to whom applications should be addressed
**JAMES C. BOHORAD, TRUSTEE 570-622-1811
P.O. BOX 1280 POTTSVILLE PA 17901-7280**
- b** The form in which applications should be submitted and information and materials they should include
SEE STATEMENT 6
- c** Any submission deadlines
NONE
- d** Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors
NONE

Part XV Supplementary Information *(continued)*

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i> SEE STATEMENT 7				11,575
Total			▶ 3a	11,575
b <i>Approved for future payment</i> N/A				
Total			▶ 3b	

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Statement 1 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
MARSHALL, BOHORAD, THORNBERG, PRICE	\$ 1,610	\$	\$	\$
TOTAL	\$ 1,610	\$ 0	\$ 0	\$ 0

Statement 2 - Form 990-PF, Part I, Line 16c - Other Professional Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
MID PENN BANK - INVESTMENT FEES	\$ 641	\$	\$	\$
TOTAL	\$ 641	\$ 0	\$ 0	\$ 0

Statement 3 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
2016 FEDERAL EXCISE TAX	\$ 137	\$	\$	\$
FOREIGN INCOME TAX WITHHELD	10			
TOTAL	\$ 147	\$ 0	\$ 0	\$ 0

Statement 4 - Form 990-PF, Part I, Line 23 - Other Expenses

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
EXPENSES				
BANK SERVICE CHARGES	60			
OFFICE SUPPLIES - CHECKS	78			
TOTAL	\$ 138	\$ 0	\$ 0	\$ 0

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Statement 5 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
AMERICAN GROWTH & BALANCED FUNDS - C	\$ 94,837	\$	COST	\$
WADDELL & REED WR ADVISOR FUNDS:				
SCIENCE AND TECHNOLOGY BOND	7,226	8,294	COST	12,556
GOVERNMENT SECURITIES	137	137	COST	
SMALL CAP	100	100	COST	
WILSHIRE GLOBAL ALLOCATION A	9,316	10,988	COST	13,352
IVY INTERNATIONAL CORE EQUITY	10,275	8,908	COST	9,021
IVY CORE EQUITY A	4,863	4,931	COST	6,832
ADVISORS HIGH INCOME A	49,073	48,095	COST	47,208
ADVISORS CORE INVESTMENT A	43,882	49,582	COST	47,105
ADVISORS CONTINENTAL INCOME A	10,185	10,839	COST	10,746
MID PENN BANK TRUST DEPT.				
T. ROWE PRICE MID CAP GROWTH		5,000	COST	4,977
VANGUARD STAR FUND		8,000	COST	7,785
VANGUARD TOTAL INTL STOCK INDEX FD		11,000	COST	11,108
VANGUARD HIGH DIVIDEND YIELD INDEX		5,000	COST	5,030
VANGUARD EMERGING MKTS STOCK INDEX		16,000	COST	16,395
VANGUARD SMALL-CAP VALUE INDEX FD		5,000	COST	4,963
FEDERATED FLOATING RATE STRAT INC		15,000	COST	14,955
FEDERATED TOTAL RETURN BOND FD IS		15,000	COST	14,964
VANGUARD SHORT-TERM CORP BD IDX AD		15,000	COST	14,883
TOTAL	\$ 229,894	\$ 236,874		\$ 241,880

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Statement 6 - Form 990-PF, Part XV, Line 2b - Application Format and Required Contents

Description

LETTER FORM, TO INCLUDE THE PURPOSE FOR WHICH THE FUNDS
WILL BE USED

Form 990-PF, Part XV, Line 2c - Submission Deadlines

Description

NONE

Form 990-PF, Part XV, Line 2d - Award Restrictions or Limitations

Description

NONE

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Statement 7 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the
Year

Name		Address		Relationship	Status	Purpose	Amount
Address							
A FOUNDATION OF PHILANTHROPIC FUNDS	NEW YORK NY 10018	520 8TH AVE.			501(C)(3)	PUBLIC CHARITY	
ALL AGES READ TOGETHER	LEESBURG VA 20175	8 C S ST. SW			501(C)(3)	FOR ASSISTANCE WITH EDUCATION	50
ALMOST HOME ANIMAL SANCTUARY	READING PA 19606	200 LIMEKILN ROAD			501(C)(3)	PUBLIC CHARITY	
ALS ASSOCIATION	WASHINGTON DC 20005	1275 K ST. NW			501(C)(3)	PUBLIC CHARITY	
AMERICAN CANCER SOCIETY	MINERSVILLE PA 17954	16 N. 4TH ST.			501(C)(3)	FOR ASSISTANCE WITH CANCER RESEARCH	
AMERICAN HEART ASSOCIATION	LANCASTER PA 17603	610 COMMUNITY WAY			501(C)(3)	CHARITABLE	
ARNOLD DELIN SCHOLARSHIP FUND	MARLIN PA 17951	17 MAPLE AVE., PO BOX 130			501(C)(3)	FOR ASSISTANCE WITH EDUCATION	
ARTIS - NAPLES	NAPLES FL 34108	5833 PELICAN BAY BLVD.				FOR ASSISTANCE WITH THE ARTS	
ASHLAND PUBLIC LIBRARY	ASHLAND PA 17921	1229 CENTRE STREET			501(C)(3)	PUBLIC CHARITY	
AVENUES	POTTSVILLE PA 17901	2 PARK STREET			501(C)(3)	FOR ASSISTANCE TO THE DISABLED	140
AVON 39 WALK TO END BREAST CANCER	RYE NY 10580	1 AVON PLAZA			501(C)(3)	PUBLIC CHARITY	
BAREFIELD DEVELOPMENT CORPORATION	POTTSVILLE PA 17901	410 LAUREL BOULEVARD			501(C)(3)	PUBLIC CHARITY	
BIG BROTHERS/BIG SISTERS	TAMPA FL 33607	2202 N. WESTSHORE BLVD.			501(C)(3)	PUBLIC CHARITY	
BISHOP'S ANNUAL APPEAL	ALLEN TOWN PA 18105	PO BOX F				FOR ASSISTANCE WITH RELIGION	
BLUE MOUNTAIN EAGLE FOUND	ORWIGSBURG PA 17961	675 REDDALE ROAD			501(C)(3)	FOR ASSISTANCE WITH YOUTH	
BLUE MOUNTAIN PTO	ORWIGSBURG PA 17961	685 RED DALE ROAD				FOR ASSISTANCE WITH EDUCATION	200
BOROUGH OF ORWIGSBURG FIRE DEPT	ORWIGSBURG PA 17961	PO BOX 205				FOR ASSISTANCE WITH FIRE FIGHTING	
		FIRE CO.					

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Statement 7 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)

Name		Address		Relationship	Status	Purpose	Amount
BOY SCOUTS OF AMERICA		1325 N. WALNUT HILL LANE					
IRVING TX 75015		501(C)(3)				PUBLIC CHARITY	
BRADY CENTER TO PREVENT GUN VIOLENC		840 FIRST STREET NE					
WASHINGTON DC 20002		501(C)(3)				PUBLIC CHARITY	
BRYN MAWR COLLEGE		101 N. MERION AVE.					
BRYN MAWR PA 19010		SCHOOL				FOR ASSISTANCE WITH EDUCATION	
CALDERONE MEMORIAL SCHOLARSHIP FD		POTTSVILLE					
POTTSVILLE PA 17901		501(C)(3)				FOR ASSISTANCE WITH EDUCATION	
CAPT. JASON B. JONES MEMORIAL FOUND		4605 BROOKSIDE COURT					
ORWIGSBURG PA 17961		501(C)(3)				PUBLIC CHARITY	250
CHABAD LUBAVITCH		382 SOUTH CENTRE STREET					
POTTSVILLE PA 17901		CHURCH				FOR ASSISTANCE WITH RELIGION	
CHARLES BABER PRESERVATION TRUST		200 SOUTH SECOND STREET					
POTTSVILLE PA 17901		501(C)(3)				PUBLIC CHARITY	100
CHILDHOOD LEUKEMIA FOUNDATION		PO BOX 21069					
LANSING MI 48909		501(C)(3)				PUBLIC CHARITY	
CHILDREN'S CANCER RECOVERY FOUND		PO BOX 238					
HERSHEY PA 17033		501(C)(3)				PUBLIC CHARITY	
CHURCH WORLD SERVICE		28006 PHILLIPS STREET					
ELKHART IN 46515		501(C)(3)				FOR ASSISTANCE WITH RELIGION	
CITY OF POTTSVILLE/YORKVILLE HOSE		WEST NORWEGIAN ST.					
POTTSVILLE PA 17901		MUNICIPALITY				FOR ASSISTANCE WITH FIRE FIGHTING	
CMON-GOLISANO CHILDREN'S MUSEUM		1508 LIVINGSTON RD.					
NAPLES FL 34109		501(C)(3)				PUBLIC CHARITY	
COLLIER COUNTY PUBLIC LIBRARY		2385 ORANGE BLOSSOM ROAD					
NAPLES FL 34109		501(C)(3)				FOR ASSISTANCE WITH EDUCATION	
COLORADO AGENCY FOR JEWISH CHARITIE		300 S. DAHLIA ST.					
DENVER CO 80246		N/A				FOR ASSISTANCE WITH RELIGION	
COMMUNITY FOUND OF COLLIER CTY		1100 IMMOKALEE ROAD					
NAPLES FL 34110		501(C)(3)				PUBLIC CHARITY	
CONSERVANCY OF SOUTHWEST FLORIDA		1450 MERRIHUE DR.					
NAPLES FL 34102		N/A				FOR ASSISTANCE WITH SCIENCE	
CONSUMER REPORTS FOUND.		101 TRUMAN AVE.					
YONKERS NY 10703		501(C)(3)				FOR ASSISTANCE WITH EDUCATION	

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Statement 7 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)

Name		Address		Relationship	Status	Purpose	Amount
CRIMSON TIDE FOOTBALL CLUB		2064 MAHANTONGO ST.				CHARITABLE	
POTTSVILLE PA 17901		501(C)(3)					
CRIMSON TIDE FOUNDATION	N/A	410 LAUREL BLVD.				PUBLIC CHARITY	
POTTSVILLE PA 17901	N/A	501(C)(3)					
DAMON RUNYAN CANCER RESEARCH	N/A	55 BROADWAY				FOR ASSISTANCE WITH CANCER RESEARCH	
NEW YORK NY 10006	N/A	501(C)(3)					
DA VINCI SCIENCE CENTER	N/A	3145 HAMILTON BLVD BYP				FOR ASSISTANCE WITH EDUCATION	
ALLENTOWN PA 18103	N/A	501(C)(3)					
DEBRA OF AMERICA	N/A	16 E. 41ST ST.				CHARITABLE	
NEW YORK NY 10017	N/A	118 S. CENTRE ST., STE. 1				FOR ASSISTANCE WITH RESEARCH	225
DIAKON COMMUNITY SERVICES	N/A	HAGERSTOWN				FOR ASSISTANCE WITH HEALTHCARE	
POTTSVILLE PA 17901	N/A	501(C)(3)					
DOCTORS WITHOUT BORDERS	N/A	418 COMMONWEALTH AVE.				PUBLIC CHARITY	200
HAGERSTOWN MD 21741	N/A	501(C)(3)					
DOC WAYNE YOUTH SERVICES INC.	N/A	45 WILDER STREET				PUBLIC CHARITY	
BOSTON MA 02215	N/A	501(C)(3)					
EAGLE FOUNDATION	N/A	2307 15TH ST. NW				CHARITABLE	
ORWIGSBURG PA 17961	N/A	2350 MCGREGOR BLVD				FOR ASSITANCE WITH EDUCATION	
ECO ENERGY FINANCE	N/A	415 SCHOOL DRIVE				FOR ASSISTANCE WITH EDUCATION	100
WASHINGTON DC 20009	N/A	SCHOOL					
EDISON MUSEUM	N/A	231 JARDIN ST.				FOR ASSISTANCE WITH RELIGION	
FORT MEYERS FL 33901	N/A	2105 LAUREL BUSH RD.				CHARITABLE	
EVERGLADE CITY SCHOOL	N/A	110 S. ROUTE 61 SOUTH				FOR ASSISTANCE WITH RELIGION	
EVERGLADES CITY FL 34139	N/A	CHURCH					
FATHER WALTER CISZEK PRAYER LEAGUE	N/A	223 PIKE STREET				FOR ASSISTANCE WITH RELIGION	
SHENANDOAH PA 17976	N/A	CHURCH					
FIRST CANDLE	N/A	800 N. KING ST.				FOR ASSISTANCE WITH RELIGION	
BEL AIR MD 21015	N/A	SCHOOL				FOR ASSISTANCE WITH EDUCATION	
FIRST UNITED CHURCH OF CHRIST	N/A						
SCHUYLKILL HAVEN PA 17972	N/A						
FIRST UNITED METHODIST CHURCH	N/A						
PORT CARBON PA 17965	N/A						
FRANCES HAZEL REID ELEMENTARY	SCHOO						
LEESBURG VA 20176	N/A						

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Statement 7 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)

Name		Address		Relationship	Status	Purpose	Amount
FRANKLIN & MARSHALL COLLEGE	LANCASTER PA 17604	N/A	415 HARRISBURG AVE.	SCHOOL		FOR ASSISTANCE WITH EDUCATION	
GABRIEL CHAMBER ENSEMBLE	ORWIGSBURG PA 17961	N/A	P.O. BOX 36	501(C)(3)		FOR ASSISTANCE WITH THE ARTS	
GIRL SCOUTS OF THE NATION'S CAPITAL	WASHINGTON DC 20008	N/A	4301 CONNECTICUT AVE. NW	501(C)(3)		PUBLIC CHARITY	
GOLISAMO CHILDREN'S MUSEUM	NAPLES FL 34109	N/A	15080 LIVINGSTON RD.	501(C)(3)		FOR ASSISTANCE WITH EDUCATION	
GULFSHORE PLAYHOUSE	NAPLES FL 34108	N/A	755 8TH AVE. SOUTH			FOR ASSISTANCE WITH THE ARTS	
HABITAT FOR HUMANITY	AMERICUS GA 31709	N/A	PO BOX 1729	501(C)(3)		FOR ASSISTANCE TO UNDER-PRIVILEGED	
HAWK MOUNTAIN SANCTUARY	KEMPTON PA 19529	N/A	1700 HAWK MOUNTAIN ROAD	501(C)(3)		FOR ASSISTANCE WITH WILDLIFE PRESERV	100
HILLSIDE SPCA	POTTSVILLE PA 17901	N/A	P.O. BOX 233	501(C)(3)		FOR ASSISTANCE TO ANIMALS	500
HODGES UNIVERSITY	NAPLES FL 34119	N/A	2655 NORTHBROOKE DR.	SCHOOL		FOR ASSISTANCE WITH EDUCATION	
HOLOCAUST MUSEUM OF SW FLORIDA	NAPLES FL 34103	N/A	4760 TAMiami TR N	501(C)(3)		FOR ASSISTANCE WITH EDUCATION	
HOLY CROSS CHURCH	NEW PHILADELPHIA PA 17951	N/A	99 VALLEY ST.	CHURCH		FOR ASSISTANCE WITH RELIGION	
HOPE HOSPICE C/O HOPE HEALTH	HYANNIS MA 02610	N/A	765 ATTUCKS LN			CHARITABLE	
HOSPICE OF CENTRAL PENNSYLVANIA	HARRISBURG PA 17110	N/A	1320 LINGLESTOWN RD.	501(C)(3)		PUBLIC CHARITY	
HOSPICE OF THE GOLDEN ISLES	BRUNSWICK GA 31525	N/A	1692 GLENCO PARKWAY	501(C)(3)		PUBLIC CHARITY	
IMMACULATE CONCEPTION SCHOOL	NEWBURYPORT MA 01950	N/A	1 WASHINGTON STREET	SCHOOL		FOR ASSISTANCE WITH EDUCATION	
INTERNATIONAL PLANNED PARENTHOOD	NEW YORK NY 10269	N/A	120 WALL STREET	501(C)(3)		FOR ASSISTANCE WITH EDUCATION	
JAMES & MARY EDITH RHOADES FOUND.	POTTSVILLE PA 17901	N/A	P.O. BOX 485	501(C)(3)		PUBLIC CHARITY	100

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**Statement 7 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the
 Year (continued)**

Name		Address		Relationship	Status	Purpose	Amount
JANET EICH LIBRARY	111 PIKE STREET						
PORT CARBON PA 17965	501(C)(3)	N/A				PUBLIC CHARITY	
JUVENILE DIABETES RESEARCH FOUN.	26 BROADWAY	N/A				FOR ASSISTANCE WITH DIABETES RESEARC	
NEW YORK NY 10004	501(C)(3)	N/A				FOR ASSISTANCE WITH EDUCATION	
KILMER MIDDLE SCHOOL DISTRICT	8100 WOLFTRAP RD.						
VIENNA VA 22182	SCHOOL						
KNIGHTS OF COLUMBUS CHARITIES	ARCH STREET						
POTTSVILLE PA 17901	501(C)(3)	N/A				PUBLIC CHARITY	
LEAGUE OF WOMEN VOTERS ED FUND	1730 NORTH ST. NW					FOR ASSISTANCE WITH EDUCATION	
WASHINGTON DC 20036	501(C)(3)	N/A				FOR ASSISTANCE WITH HEALTH CARE	840
LEHIGH VALLEY HEALTH NETWORK	420 S. JACKSON ST.						
POTTSVILLE PA 17901	HOSPITAL						
LEUKEMIA AND LYMPHOMA SOC	PO BOX 4072						
PITTSFIELD MA 01202	501(C)(3)	N/A				FOR ASSISTANCE WITH LEUKEMIA RESEARC	
MAHANOY AREA HISTORICAL SOCIETY	P.O. BOX 127						
MAHANOY CITY PA 17948		N/A				FOR ASSISTANCE WITH EDUCATION	
MAHANOY CITY VISITING NURSES ASSOC.	100 E. MARKET STREET						
MAHANOY CITY PA 17948	501(C)(3)	N/A				PUBLIC CHARITY	
MAKE-A-WISH FOUNDATION							
MARLIN HOSE COMPANY	501(C)(3)					PUBLIC CHARITY	100
MARLIN PA 17951	PO BOX 83						
MATH COUNTS	400 ONE NORWEGIAN PLAZA	N/A				MUNICIPALITY FOR ASSISTANCE WITH FIRE FIGHTING	100
MEMORIAL SLOAN KETTERING	1275 YORK AVE.	N/A				FOR ASSISTANCE WITH EDUCATION	
NEW YORK NY 10065	HOSPITAL						
MID PENN LEGAL SERVICES	315 N. CENTRE ST,STE 201	N/A				FOR ASSISTANCE WITH SCIENCE	
POTTSVILLE PA 17901	501(C)(3)	N/A				PUBLIC CHARITY	50
MINERSVILLE PUBLIC LIBRARY	220 S. FOURTH ST.						
MINERSVILLE PA 17954	501(C)(3)	N/A				FOR ASSISTANCE WITH EDUCATION	50
MULICK SCHOLARSHIP FUND	PO BOX 57						
HEGINS PA 17938	501(C)(3)	N/A				FOR ASSISTANCE WITH EDUCATION	
MUSCULAR DYSTROPHY ASSOC.	5940 HAMILTON BLVD.						
ALLENTOWN PA 18106	501(C)(3)	N/A				FOR ASSISTANCE WITH RESEARCH	470

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Statement 7 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)

Name		Address		Relationship	Status	Purpose	Amount
Address							
NAPLES BOTANICAL GARDENS		4820 BAYSHORE DRIVE				PUBLIC CHARITY	110
NAPLES FL 34112	N/A	501(C)(3)					
NAPLES COUNCIL ON WORLD AFFAIRS		12290 TREELINE AVE.				FOR ASSISTANCE WITH EDUCATION	
FORT MYERS FL 33913	N/A	501(C)(3)					
NAPLES MUSEUM OF ART		5833 PELICAN BAY BLVD.				FOR ASSISTANCE TO THE ARTS	
NAPLES FL 34108	N/A	501(C)(3)					
NATIONAL AQUARIUM OF BALTIMORE		501 E. PRATT ST.				FOR ASSISTANCE WITH EDUCATION	
BALTIMORE MD 21202	N/A						
NATIONAL COUNCIL OF WORLD AFFAIRS		12290 TREELINE AVE.				PUBLIC CHARITY	
FT. MYERS FL 33913	N/A	501(C)(3)					
NATIONAL WHEELCHAIR BASKETBALL ASSO		1130 ELKTON STREET				FOR ASSISTANCE TO HANDICAPPED	100
COLORADO SPRINGS CO 80907	N/A	501(C)(3)					
NATIVITY BVM HIGH SCHOOL		LAWTON HILL				FOR ASSISTANCE WITH EDUCATION	200
POTTSVILLE PA 17901	N/A	SCHOOL					
N. BERKS/S. SCHUYLKILL HIST. SOC.		PORT CLINTON				FOR ASSISTANCE WITH EDUCATION	250
PORT CLINTON PA 19549	N/A						
OHEB ZEDECK SISTERHOOD		2400 WEST END AVE.				FOR ASSISTANCE WITH RELIGION	
POTTSVILLE PA 17901	N/A	CHURCH					
OHEB ZEDECK SYNAGOGUE CENTER		2400 WEST END AVE.				FOR ASSISTANCE WITH RELIGION	
POTTSVILLE PA 17901	N/A	CHURCH					
OLMSTED CENTER FOR SIGHT		1170 MAIN ST.				PUBLIC CHARITY	250
BUFFALO NY 14209	N/A	501(C)(3)					
ORWIGSBURG BOROUGH		NORTH WARREN ST.				FOR ASSISTANCE WITH AMBULANCE SERVIC	
ORWIGSBURG PA 17961	N/A	501(C)(3)					
ORWIGSBURG FREE PUBLIC LIBRARY		214 INDEPENDENCE ST.				FOR ASSISTANCE WITH EDUCATION/BOOKS	100
ORWIGSBURG PA 17961	N/A	501(C)(3)					
PAHS GIRLS SOFTBALL BOOSTERS		16TH ST. & ELK AVE.				FOR ASSISTANCE WITH YOUTH ATHLETICS	
POTTSVILLE PA 17901	N/A						
PARKINSON ASSOC. OF S.W. FLORIDA		1048 GOODLETTE RD.				FOR ASSISTANCE WITH PARKINSON RESEAR	
NAPLES FL 34102	N/A	501(C)(3)					
PENNSYLVANIA FOP ASSOCIATION		2949 NORTH FRONT STREET				PUBLIC CHARITY	
HARRISBURG PA 17110-1250	N/A	501(C)(3)					
PENNSYLVANIA HERITAGE FOUNDATION		400 NORTH STREET				FOR ASSISTANCE WITH EDUCATION	
HARRISBURG PA 17120	N/A	501(C)(3)					

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**Statement 7 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the
 Year (continued)**

Name		Address		Relationship	Status	Purpose	Amount
PENNSYLVANIA STATE UNIVERSITY		201 OLD MAIN			SCHOOL	FOR ASSISTANCE WITH EDUCATION	
UNIVERSITY PARK PA 16802		N/A					
PEOPLE FOR THE AMERICAN WAY FOUND		2000 M ST NW			501(C)(3)	FOR ASSISTANCE WITH EDUCATION	
WASHINGTON DC 20077		N/A					
PHILHARMONIC CTR FOR ARTS		5833 PELICAN BAY BLVD.			501(C)(3)	FOR ASSISTANCE WITH ARTS	
NAPLES FL 34108		N/A					
PHOENIX FIRE COMPANY NO. 2		P.O. BOX 1245				FOR ASSISTANCE WITH FIREFIGHTING	800
POTTSVILLE PA 17901		N/A					
PLANNED PARENTHOOD FEDERATION OF AM		PO BOX 97166			501(C)(3)	FOR ASSISTANCE WITH EDUCATION	150
WASHINGTON DC 20077		N/A					
POTTSVILLE CHAPTER OF HADASSAH		2400 WEST END AVENUE			501(C)(3)	FOR ASSISTANCE WITH RELIGION	
POTTSVILLE PA 17901		N/A					
POTTSVILLE CRIMSON TIDE WRESTLING		POTTSVILLE				CHARITABLE	
POTTSVILLE PA 17901		N/A					
POTTSVILLE MIDGET FOOTBALL LEAGUE		POTTSVILLE				FOR ASSISTANCE WITH YOUTH ATHLETICS	
POTTSVILLE PA 17901		N/A					
POTTSVILLE FREE PUBLIC LIBRARY		215 W. MARKET ST.			501(C)(3)	FOR ASSISTANCE WITH EDUCATION/BOOKS	650
POTTSVILLE PA 17901		N/A					
POTTSVILLE ROTARY CHARITIES		POTTSVILLE				PUBLIC CHARITY	
POTTSVILLE PA 17901		N/A					
POTTSVILLE TEENER BASEBALL LEAGUE		436 ADAMS STREET				FOR ASSISTANCE WITH YOUTH SPORTS	
POTTSVILLE PA 17901		N/A					
PRINCETON CLUB OF SW FLORIDA		PO BOX 112795			501(C)(3)	FOR ASSISTANCE WITH EDUCATION	
NAPLES FL 34108		N/A					
PRINCETON UNIVERSITY		1 NASSAU HALL				FOR ASSISTANCE WITH EDUCATION	
PRINCETON NJ 08544		N/A					
PSP CAMP CADET		C/O RIVERVIEW BANK			501(C)(3)	PUBLIC CHARITY	
POTTSVILLE PA 17901		N/A					
READING HEALTH SYSTEM FOUNDATION		6TH AVE. & SPRUCE ST.			HOSPITAL	FOR ASSISTANCE WITH HEALTH CARE	
WEST READING PA 19608		N/A					
READING PUBLIC MUSEUM		500 MUSEUM ROAD			501(C)(3)	FOR ASSISTANCE WITH EDUCATION	
READING PA 19611		N/A					
RENAISSANCE ACAD OF FL		8695 COLLEGE PARKWAY			SCHOOL	FOR ASSISTANCE WITH EDUCATION	
FORT MYERS FL 33919		N/A					

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Statement 7 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)

Name		Address		Relationship	Status	Purpose	Amount
RIDE TO CONQUER CANCER	PHILADELPHIA PA 19128	N/A	6024 RIDGE AVE.		501(C)(3)	PUBLIC CHARITY	
RUTH STEINERT SPCA	PINE GROVE PA 17963	N/A	18 WERTZ DR.		501(C)(3)	PUBLIC CHARITY	
SALVATION ARMY	POTTSVILLE PA 17901	N/A	N. CENTRE STREET		501(C)(3)	PUBLIC CHARITY	
SCHUYLKILL ALLIANCE FOR HEALTHCARE	POTTSVILLE PA 17901	N/A	ONE SOUTH SECOND STREET		501(C)(3)	FOR ASSISTANCE WITH HEALTH CARE	
SCHUYLKILL AREA COMMUNITY FOUNDATIO	POTTSVILLE PA 17901	N/A	216 SOUTH CENTRE STREET		501(C)(3)	PUBLIC CHARITY	500
SCHUYLKILL COUNTY COUNCIL FOR ARTS	POTTSVILLE PA 17901	N/A	1440 MAHANTONGO STREET		501(C)(3)	FOR ASSISTANCE WITH ARTS	100
SCHUYLKILL COUNTY HISTORICAL SOCIET	POTTSVILLE PA 17901	N/A	305 N. CENTRE ST.		501(C)(3)	PUBLIC CHARITY	100
SCHUYLKILL COUNTY YMCA	POTTSVILLE PA 17901	N/A	219 N. 12TH ST.		501(C)(3)	TO PROMOTE CHRISTIAN PRINCIPLES	1,000
SCHUYLKILL EMS	POTTSVILLE PA 17901	N/A	320 N. 9TH ST.		501(C)(3)	CHARITABLE	100
SCHUYLKILL HEALTH CARE	POTTSVILLE PA 17901	N/A	SOUTH JACKSON ST.		501(C)(3)	PUBLIC CHARITY	
SCHUYLKILL INTERMEDIATE UNIT 29	MARLIN PA 17951	N/A	17 MAPLE AVE.		SCHOOL	FOR ASSISTANCE WITH EDUCATION	
SCHUYLKILL MEDICAL CENTER	POTTSVILLE PA 17901	N/A	SOUTH JACKSON ST.		HOSPITAL	FOR ASSISTANCE WITH HEALTH CARE	
SCHUYLKILL UNITED WAY	POTTSVILLE PA 17901	N/A	9 NORTH CENTRE ST.		501(C)(3)	PUBLIC CHARITY	1,020
SCHUYLKILL WOM. IN CRISIS	POTTSVILLE PA 17901	N/A	368 S. CENTER ST.		501(C)(3)	FOR ASSISTANCE TO WOMEN	
SCHUYLKILL YMCA	POTTSVILLE PA 17901	N/A	NORTH CENTRE STREET		501(C)(3)	PUBLIC CHARITY	
SELTZER HOSE COMPANY	POTTSVILLE PA 17901	N/A	PO BOX 4270		MUNICIPALITY	FOR ASSISTANCE WITH FIRE FIGHTING	100
SELTZER PA 17974	POTTSVILLE PA 17901	N/A	17 WESTWOOD CENTRE		501(C)(3)	FOR ASSISTANCE TO VICTIMS	300
SEXUAL ASSAULT RESOURCE COUNS CTR	POTTSVILLE PA 17901	N/A					

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Statement 7 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)

Name		Address		Relationship	Status	Purpose	Amount
SHELTER FOR ABUSED WOMEN & CHILDREN		LAKEWOOD BOULEVARD					
NAPLES FL 34112		501(C)(3)				FOR ASSISTANCE TO VICTIMS	
SHRINER'S CHILDREN'S HOSPITAL		3551 N. BROAD ST.					
PHILADELPHIA PA 19140		HOSPITAL				FOR ASSISTANCE WITH HEALTH CARE	
SJOGREN'S SYNDROME FOUNDATION		6707 DEMOCRACY BOULEVARD					
BETHESDA MD 20817		501(C)(3)				FOR ASSISTANCE WITH EDUCATION	
SOL LIPTON SCHOLARSHIP FOUNDATION		316 N. CENTRE ST.					
POTTSVILLE PA 17901		501(C)(3)				FOR ASSISTANCE WITH EDUCATION	100
SOUTHERN POVERTY LAW CENTER		400 WASHINGTON AVE.					
MONTGOMERY AL 36104		NORTH CENTRE STREET				FOR ASSISTANCE WITH EDUCATION	
SOVEREIGN MAJESTIC THEATRE		501(C)(3)				FOR ASSISTANCE WITH ARTS	70
POTTSVILLE PA 17901		4000 DEKALB PARKWAY					
SPECIAL OLYMPICS GEORGIA		501(C)(3)				FOR ASSISTANCE TO HANDICAPPED	
ATLANTA GA 30340		10TH & MAHANTONGO STREETS					
ST. JOHN THE BAPTIST CHURCH		CHURCH				FOR ASSISTANCE WITH RELIGION	
POTTSVILLE PA 17901		236 MARKET STREET					
ST. JOHN'S UCC CHURCH		CHURCH				FOR ASSISTANCE WITH RELIGION	
ORWIGSBURG PA 17961		2075 W. NORWEGIAN STREET					
ST. JOSEPH CENTER		501(C)(3)				FOR ASSISTANCE WITH EDUCATION	700
POTTSVILLE PA 17901		NAPLES					
ST. KATHERINE'S CHURCH		CHURCH				FOR ASSISTANCE WITH RELIGION	
NAPLES FL 34108		30 POTTSVILLE STREET					
ST. MARK'S UCC		CHURCH				FOR ASSISTANCE WITH RELIGION	
CRESSONA PA 17929		CHURCH				FOR ASSISTANCE WITH RELIGION	
ST. NICHOLAS CHURCH		SUNBURY STREET					
MINERSVILLE PA 17954		CHURCH				FOR ASSISTANCE WITH RELIGION	
ST. NICHOLAS SCHOOL MEMORIAL FUND		515 NORTH FRONT STREET					
MINERSVILLE PA 17954		SCHOOL				FOR ASSISTANCE WITH EDUCATION	150
ST. PATRICK'S CHURCH		319 MAHANTONGO ST.					
POTTSVILLE PA 17901		CHURCH				FOR ASSISTANCE WITH RELIGION	125
ST. RICHARD'S CHURCH		BARNESVILLE					
BARNESVILLE PA 18214		CHURCH				FOR ASSISTANCE WITH RELIGION	
SUSAN G. KORMAN FOR CURE		5005 LBJ FREEWAY					
DALLAS TX 75244		501(C)(3)				ASSISTANCE WITH MEDICAL RESEARCH	

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Statement 7 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)

Name		Address		Relationship	Status	Purpose	Amount
Address							
TEMPLE UNIVERSITY HOOTATHON PHILADELPHIA PA 19122		N/A	NORTH BROAD STREET SCHOOL			FOR ASSISTANCE WITH EDUCATION	
THE HILL SCHOOL POTTSTOWN PA 19464		N/A	717 E. HIGH ST. SCHOOL			FOR ASSISTANCE WITH EDUCATION	
THE MAIN IDEA AT CAMP WALDEN DENMARK ME 04022		N/A	93 WALDEN DR. 501 (C) (3)			FOR ASSISTANCE WITH EDUCATION	
THE TAUSSIG CANCER INS AT CLEVELAND CLEVELAND OH 44195		N/A	9500 EUCLID 501 (C) (3)			FOR ASSISTANCE WITH EDUCATION	
TRINITY LUTHERAN CHURCH POTTSVILLE PA 17901		N/A	300 W. ARCH ST. CHURCH			FOR ASSISTANCE WITH RELIGION	
TRUSTEES OF PHILLIPS ACADEMY BOSTON MA 02205		N/A	P.O. BOX 55557 SCHOOL			FOR ASSISTANCE WITH EDUCATION	50
TRUSTEES OF UNIV OF PENNSYLVANIA PHILADELPHIA PA 19194		N/A	3910 CHESTNUT STREET SCHOOL			FOR ASSISTANCE WITH EDUCATION	350
TRYALL FUND NEW YORK NY 10022		N/A	641 LEXINGTON AVE. 501 (C) (3)			FOR ASSISTANCE IN EDUCATION	
UNIVERSITY OF PENNSYLVANIA PHILADELPHIA PA 19104		N/A	PHILADELPHIA SCHOOL			FOR ASSISTANCE WITH EDUCATION	
UNIVERSITY OF PITTSBURGH PITTSBURGH PA 15260		N/A	4200 FIFTH AVENUE SCHOOL			FOR ASSISTANCE WITH EDUCATION	
UPPER SCHUYLKILL HIGH SCHOOL HAZLE TWP PA 18202		N/A	4210 HOLLYWOOD BOULEVARD SCHOOL			FOR ASSISTANCE WITH EDUCATION	
WALK IN ART CENTER SCHUYLKILL HAVEN PA 17972		N/A	100 S. COLUMBIA AVE. 501 (C) (3)			FOR ASSISTANCE WITH ARTS	225
WESTBRIAR PTA VIENNA VA 22182		N/A	1741 PINE VALLEY DRIVE 10501 FCGU BLVD. SOUTH			FOR ASSISTANCE WITH EDUCATION	
WGCU PUBLIC TELEVISION FT. MYERS FL 33965		N/A	N/A 244 5TH AVE.			FOR ASSISTANCE WITH EDUCATION	
WOMEN IN SPORTS NEW YORK NY 10001		N/A	501 (C) (3)			PUBLIC CHARITY	
WVIA TV PUBLIC BROADCASTING PITTSSTON PA 18640		N/A	100 WVIA WAY 20TH & WEST NORWEGIAN STS			FOR ASSISTANCE WITH EDUCATION	100
YORKVILLE HOSE FIRE COMPANY POTTSVILLE PA 17901		N/A				FOR ASSISTANCE WITH FIRE FIGHTING	

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**Statement 7 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the
Year (continued)**

Name	Address	Relationship	Status	Purpose	Amount
TOTAL					11,575

Underdistribution and Excess Distributions for Part XIIIForm **990-PF****2017**

For calendar year 2017, or tax year beginning , ending

Name

**BEN D. SPAGOLIO CHARITABLE TRUST
C/O JAMES C. BOHORAD, TRUSTEE**Employer Identification Number
13-7345617**Undistributed Income Carryovers**

Form 990-PF, Part XIII

Tax Year	Prior Undistributed Income			Current Year Decreases	Next Year Carryover	
	Nontaxable or Previously Taxed	Taxable in 2017	Total per Year		Nontaxable or Previously Taxed	Taxable in 2018
Years prior						
20 13						
20 14						
20 15						
2016		11,552	11,552	11,552		
2017			12,135	23		12,112
Total Carryover to Next Year						12,112

* Carryover amount includes 4942(a) amounts

Excess Distribution Carryovers

Form 990-PF, Part XIII

Preceding Tax Year Excess Distributions	Current Year	Next Year
	Decreases	Carryover
2012		
2013		
2014		
2015		
2016		
Current Year Excess Distribution Generated (2017)		0
Total Carryover to Next Year		0