

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.

Go to www.irs.gov/Form990PF for instructions and the latest information.

2017

Open to Public Inspection

For calendar year 2017 or tax year beginning

, and ending

Name of foundation

CELESTE AND KURT ZUCH FAMILY
FOUNDATION, INC.

A Employer identification number

20-2025163

Number and street (or P O box number if mail is not delivered to street address)

3419 WESTMINSTER AVE

Room/suite

236

B Telephone number

404-841-8855

City or town, state or province, country, and ZIP or foreign postal code

DALLAS, TX 75205

C If exemption application is pending, check here ☐

G Check all that apply:

☐

Initial return

☐

Initial return of a former public charity

☐

Final return

☒

Amended return

☒

Address change

☐

Name change

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

H Check type of organization:

☒

Section 501(c)(3) exempt private foundation

☐

Section 4947(a)(1) nonexempt charitable trust

☐

Other taxable private foundation

E If private foundation status was terminated
under section 507(b)(1)(A), check here ☐I Fair market value of all assets at end of year
(from Part II, col. (c), line 16)

\$ 1,407,038.

J Accounting method:

☒

Cash

☐

Accrual

☐

Other (specify)

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

Part I

Analysis of Revenue and Expenses

(The total of amounts in columns (b), (c), and (d) may not
necessarily equal the amounts in column (a).)(a) Revenue and
expenses per books(b) Net investment
income(c) Adjusted net
income(d) Disbursements
for charitable purposes
(cash basis only)

1	Contributions, gifts, grants, etc., received	202,551.		N/A	
2	Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments				
4	Dividends and interest from securities	20,908.	20,385.		STATEMENT 1
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	25,707.			
b	Gross sales price for all assets on line 6a	25,707.			
7	Capital gain net income (from Part IV, line 2)		25,707.		
8	Net short-term capital gain				
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less: Cost of goods sold				
c	Gross profit or (loss)				
11	Other income				
12	Total. Add lines 1 through 11	249,166.	46,092.		
13	Compensation of officers, directors, trustees, etc.	0.	0.		0.
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees				
b	Accounting fees	3,175.	0.		3,175.
c	Other professional fees				
17	Interest				
18	Taxes	736.	142.		0.
19	Depreciation and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses	4,270.	0.		0.
24	Total operating and administrative expenses. Add lines 13 through 23	8,181.	142.		3,175.
25	Contributions, gifts, grants paid	86,016.			86,016.
26	Total expenses and disbursements. Add lines 24 and 25	94,197.	142.		89,191.
27	Subtract line 26 from line 12:				
a	Excess of revenue over expenses and disbursements	154,969.			
b	Net investment income (if negative, enter -0-)		45,950.		
c	Adjusted net income (if negative, enter -0-)			N/A	

CELESTE AND KURT ZUCH FAMILY

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FOUNDATION, INC.

20-2025163

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
Assets	1 Cash - non-interest-bearing					
	2 Savings and temporary cash investments			445,034.	350,702.	350,702.
	3 Accounts receivable ▶					
	Less: allowance for doubtful accounts ▶					
	4 Pledges receivable ▶					
	Less: allowance for doubtful accounts ▶					
	5 Grants receivable					
	6 Receivables due from officers, directors, trustees, and other disqualified persons					
	7 Other notes and loans receivable ▶					
	Less: allowance for doubtful accounts ▶					
	8 Inventories for sale or use					
	9 Prepaid expenses and deferred charges					
	10a Investments - U.S. and state government obligations					
	b Investments - corporate stock	STMT 5		701,357.	874,639.	1,056,336.
	c Investments - corporate bonds					
	11 Investments - land, buildings, and equipment: basis ▶					
Less: accumulated depreciation ▶						
12 Investments - mortgage loans						
13 Investments - other						
14 Land, buildings, and equipment: basis ▶						
Less: accumulated depreciation ▶						
15 Other assets (describe ▶)						
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)			1,146,391.	1,225,341.	1,407,038.	
Liabilities	17 Accounts payable and accrued expenses					
	18 Grants payable					
	19 Deferred revenue					
	20 Loans from officers, directors, trustees, and other disqualified persons					
	21 Mortgages and other notes payable					
	22 Other liabilities (describe ▶)					
23 Total liabilities (add lines 17 through 22)			0.	0.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>					
	and complete lines 24 through 26, and lines 30 and 31					
	24 Unrestricted					
	25 Temporarily restricted					
	26 Permanently restricted					
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>					
	and complete lines 27 through 31					
	27 Capital stock, trust principal, or current funds			0.	0.	
28 Paid-in or capital surplus, or land, bldg., and equipment fund			0.	0.		
29 Retained earnings, accumulated income, endowment, or other funds			1,146,391.	1,225,341.		
30 Total net assets or fund balances			1,146,391.	1,225,341.		
31 Total liabilities and net assets/fund balances			1,146,391.	1,225,341.		

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	1,146,391.
2 Enter amount from Part I, line 27a	2	154,969.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	1,301,360.
5 Decreases not included in line 2 (itemize) ▶ NET ASSET ADJUSTMENT	5	76,019.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,225,341.

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Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (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 CAPITAL GAINS DIVIDENDS			
b			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 25,707.			25,707.
b			
c			
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			25,707.
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	25,707.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	}	3	N/A

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No
If "Yes," the foundation doesn't 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	66,182.	882,738.	.074974
2015	73,111.	563,307.	.129789
2014	76,949.	402,087.	.191374
2013	42,249.	305,425.	.138329
2012	33,656.	315,887.	.106544

2 Total of line 1, column (d)	2	.641010
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	3	.128202
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	4	1,204,260.
5 Multiply line 4 by line 3	5	154,389.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	460.
7 Add lines 5 and 6	7	154,849.
8 Enter qualifying distributions from Part XII, line 4	8	89,191.

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)			
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	919.
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	919.
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	919.
6 Credits/Payments:			
a 2017 estimated tax payments and 2016 overpayment credited to 2017	6a	0.	
b Exempt foreign organizations - tax withheld at source	6b	0.	
c Tax paid with application for extension of time to file (Form 8868)	6c	0.	
d Backup withholding erroneously withheld	6d	0.	
7 Total credits and payments. Add lines 6a through 6d	TAX PAID W/ O.R.		937.
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	18.	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	0.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be: Credited to 2018 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11		

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?		Yes	No
1b 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"/> \$ 0. (2) On foundation managers. <input type="checkbox"/> \$ 0.			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input type="checkbox"/> \$ 0.			
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.	2		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		X
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.	5		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6		X
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	7	X	
8a Enter the states to which the foundation reports or with which it is registered. See instructions. <input type="checkbox"/> TX			
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	8b	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2017 or the tax year beginning in 2017? See the instructions for Part XIV. If "Yes," complete Part XIV	9		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10	X	

N/A

STMT 6

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?	X	
Website address ► <u>N/A</u>		
14 The books are in care of ► <u>KURT ZUCH</u> Telephone no. ► <u>404-841-8855</u>		
Located at ► <u>3419 WESTMINSTER AVE #236, DALLAS, TX</u> ZIP+4 ► <u>75205</u>		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here <input type="checkbox"/>		
and enter the amount of tax-exempt interest received or accrued during the year ► <u>15</u> <u>N/A</u>		
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?	Yes	No
See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►	16	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):		
(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	N/A	
Organizations relying on a current notice regarding disaster assistance, check here <input type="checkbox"/>		
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?		X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 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 ► _____		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► _____		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If "Yes," did it have excess business holdings in 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

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

N/A

☒

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?

If "Yes" to 6b, file Form 8870.

6b

X

7a

At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes

☒ No

b

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

N/A

7b

Part VIII

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

1

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
KURT A ZUCH	DIRECTOR - PART	TIME		
3419 WESTMINSTER AVE #236	0.50	0.	0.	0.
DALLAS, TX 75205				
CELESTE B ZUCH	DIRECTOR - PART	TIME		
3419 WESTMINSTER AVE #236	0.50	0.	0.	0.
DALLAS, TX 75205				

2

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

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

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

0

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

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

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

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

C

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
------------------	---

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		
3	All other program-related investments. See instructions.	
Total. Add lines 1 through 3		0.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	821,553.
b	Average of monthly cash balances	1b	401,046.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	1,222,599.
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	1,222,599.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	18,339.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,204,260.
6	Minimum investment return. Enter 5% of line 5	6	60,213.

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	60,213.
2a	Tax on investment income for 2017 from Part VI, line 5	2a	919.
b	Income tax for 2017. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	919.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	59,294.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	59,294.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	59,294.

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	89,191.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	4	89,191.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions Subtract line 5 from line 4	6	89,191.

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.

CELESTE AND KURT ZUCH FAMILY

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FOUNDATION, INC.

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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				59,294.
2 Undistributed income, if any, as of the end of 2017				
a Enter amount for 2016 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2017:				
a From 2012	18,041.			
b From 2013	27,348.			
c From 2014	57,609.			
d From 2015	45,356.			
e From 2016	22,633.			
f Total of lines 3a through e	170,987.			
4 Qualifying distributions for 2017 from Part XII, line 4: ► \$	89,191.			
a Applied to 2016, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2017 distributable amount				59,294.
e Remaining amount distributed out of corpus	29,897.			
5 Excess distributions carryover applied to 2017 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	200,884.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2016. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2017. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2018				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2012 not applied on line 5 or line 7	18,041.			
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a	182,843.			
10 Analysis of line 9:				
a Excess from 2013	27,348.			
b Excess from 2014	57,609.			
c Excess from 2015	45,356.			
d Excess from 2016	22,633.			
e Excess from 2017	29,897.			

N/A

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

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:

(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(i)(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).)

SEE STATEMENT 7

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

NONE

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

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc., 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:

SEE STATEMENT 8

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:

**CELESTE AND KURT ZUCH FAMILY
FOUNDATION, INC.**

Form 990-PF (2017)

20-2025163 Page 11

Part XV **Supplementary Information** (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution * *	Amount
a Paid during the year				
ADOPT A PLATOON PO BOX 1846 MERRIFIELD, VA 22116	NONE	PUBLIC	PROVIDES ONGOING MAIL SUPPORT TO DEPLOYED TROOPS REPRESENTING ALL BRANCHES OF THE U.S. MILITARY.	264.
AMERICAN BIBLE SOCIETY 101 NORTH INDEPENDENCE MALL EAST FL8 PHILADELPHIA, PA 19106	NONE	PUBLIC	SUPPORT FOR RELIGIOUS INITIATIVES	150.
ARMSTRONG ELEMENTARY PTA 3600 CORNELL AVENUE DALLAS, TX 75205	NONE	PUBLIC	TO PROVIDE A POSITIVE AND NURTURING ENVIRONMENT AND FLEXIBLE STRUCTURE WHICH ENABLES CHILDREN	250.
ATLANTA SPEECH SCHOOL 3160 NORTHSIDE PARKWAY NW ATLANTA, GA 30327	NONE	PUBLIC	ANNUAL FUND & GALA TO BENEFIT NEED-BASED FINANCIAL AID PROGRAM	750.
CAMPUS CRUSADE FOR CHRIST PO BOX 628222 ORLANDO, FL 32862	NONE	PUBLIC	SUPPORT OF RELIGIOUS PROGRAMS	2,000.
Total	SEE CONTINUATION SHEET(S)			86,016.
b Approved for future payment				
NONE				
Total				0.

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	
		(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount		
1 Program service revenue:							
a _____							
b _____							
c _____							
d _____							
e _____							
f _____							
g Fees and contracts from government agencies							
2 Membership dues and assessments							
3 Interest on savings and temporary cash investments							
4 Dividends and interest from securities				14	20,908.		
5 Net rental income or (loss) from real estate:							
a Debt-financed property							
b Not debt-financed property							
6 Net rental income or (loss) from personal property							
7 Other investment income							
8 Gain or (loss) from sales of assets other than inventory				14	25,707.		
9 Net income or (loss) from special events							
10 Gross profit or (loss) from sales of inventory							
11 Other revenue:							
a _____							
b _____							
c _____							
d _____							
e _____							
12 Subtotal. Add columns (b), (d), and (e)			0.		46,615.	0.	
13 Total. Add line 12, columns (b), (d), and (e)						46,615.	

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

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

[illegible]

Part XVII

- | | Yes | No |
|-------|-----|----|
| | | |
| 1a(1) | | X |
| 1a(2) | | X |
| | | |
| 1b(1) | | X |
| 1b(2) | | X |
| 1b(3) | | X |
| 1b(4) | | X |
| 1b(5) | | X |
| 1b(6) | | X |
| 1c | | X |

[illegible]

☐ Yes ☒ No

b If "Yes," complete the following schedule.

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

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

9-7-18

Date _____

Title

☒ Yes ☐ No☒ Yes ☐ NoForm **990-PF** (2017)

**CELESTE AND KURT ZUCH FAMILY
FOUNDATION, INC.**

20-2025163

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
CATO INSTITUTE 1000 MASSACHUSETTS AVE NW WASHINGTON, DC 20001	NONE	PUBLIC	TO PROVIDE ASSISTANCE FOR PUBLIC POLICY RESEARCH	2,000.
CENTER FOR FAMILY RESOURCES: EVERY DAY HERO 5858 HORTON STREET, SUITE 575 EMERYVILLE, CA 94608	NONE	PUBLIC	TO SUPPORT VARIOUS CAUSES	272.
FOLDS OF HONOR 5944 MCFARLAND DRIVE PLANO, TX 75093	NONE	PUBLIC	TO PROVIDE EDUCATIONAL SCHOLARSHIPS TO SPOUSES AND CHILDREN OF AMERICA'S FALLEN AND DISABLED	7,700.
HELICOPTERS FOR HEROES 9219 VISCOUNT ROW DALLAS, TX 75247	NONE	PUBLIC	SUPPORT FOR VETERANS	1,000.
HEROES FOR HANDBAGS 1701 GATEWAY BLVD SUITE 410 RICHARDSON, TX 75080	NONE	PUBLIC	TO PROVIDE FINANCIAL AND SOCIAL ASSISTANCE TO FAMILIES WITH CHILDREN BATTLING CANCER	180.
HIGHLAND PARK EDUCATION FOUNDATION 4201 GRASSMERE LANE DALLAS, TX 75205	NONE	PUBLIC	TO SUPPORT QUALITY EDUCATION IN THE HIGHLAND PARK INDEPENDENT SCHOOL DISTRICT	5,000.
HIGHLAND PARK MIDDLE SCHOOL PTA 3555 GRANADA DRIVE DALLAS, TX 75205	NONE	PUBLIC	TO PROVIDE A POSITIVE AND NURTURING ENVIRONMENT AND FLEXIBLE STRUCTURE WHICH ENABLES CHILDREN	650.
HIGHLAND PARK UNITED METHODIST CHURCH 3300 MOCKINGBIRD LANE DALLAS, TX 75205	NONE	PUBLIC	TO AID AND HELP PEOPLE BECOME DEEPLY DEVOTED FOLLOWERS OF JESUS CHRIST	12,500.
MCINTIRE SCHOOL OF COMMERCE FOUNDATION 125 RUPPEL DR CHARLOTTESVILLE, VA 22903	NONE	PUBLIC	ASSIST FUNDING CURRICULUM OF BUSINESS PROGRAM	9,000.
NATIONAL TEXAS GIVING DAY 5500 CARUTH HAVEN LANE DALLAS, TX 75225	NONE	PUBLIC	TO RAISE AWARENESS OF NONPROFITS TO A MOVEMENT THAT HAS IGNITED A BROAD CULTURE OF	500.
Total from continuation sheets				82,602.

**CELESTE AND KURT ZUCH FAMILY
FOUNDATION, INC.**

20-2025163

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)				
Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
NORTH DALLAS YOUNG LIFE 11300 N CENTRAL EXPY # 600 DALLAS, TX 75243	NONE	PUBLIC	SUPPORT FOR RELIGIOUS INITIATIVES	500.
NORTH POINT MINISTRIES 4350 NORTH POINT PKWY ALPHARETTA, GA 30022	NONE	PUBLIC	TO SUPPORT RELIGIOUS PROGRAMS AND COMMUNITY OUTREACH	500.
PAWS FOR PURPLE HEARTS 5860 LABATH AVENUE, SUITE A ROHNERT PARK, CA 94928	NONE	PUBLIC	TO OFFER CANINE-ASSISTED WARRIOR THERAPY.	100.
PER SCHOLAS INC. 211 N. ERVAY, SUITE 700 DALLAS, TX 75201	NONE	PUBLIC	TO OPEN DOORS TO TRANSFORMITIVE TECH CAREERS FOR INDIVIDUALS FROM OFTEN OVERLOOKED	1,000.
PRACTICE MINISTRIES 8117 PRESTON RD # 300 DALLAS, TX 75225	NONE	PUBLIC	SUPPORT FOR RELIGIOUS INITIATIVES	5,000.
PROVERBS 31 MINISTRIES 630 TEAM ROAD STE 100 MATTHEWS, NC 28105	NONE	PUBLIC	TO LEAD WOMEN INTO A PERSONAL RELATIONSHIP WITH CHRIST.	100.
RAYO DE SOL 3775 COBB INTERNATIONAL BLVD KENNESAW, GA 30152	NONE	PUBLIC	TO SUPPORT EDUCATION, NURITION, HEALTHCARE & COMMUNITY DEVELOPMENT	1,000.
ST. MARK'S SCHOOL OF TEXAS 10600 PRESTON ROAD DALLAS, TX 75230	NONE	PUBLIC	TO PREPARE YOUNG MEN TO ASSUME LEADERSHIP AND RESPONSIBILITY IN A COMPETITIVE AND CHANGING WORLD	50.
STUDENTS FOR LIBERTY PO BOX 97246 WASHINGTON, DC 20090	NONE	PUBLIC	TO EDUCATE, DEVELOP, AND EMPOWER THE NEXT GENERATION OF LEADERS OF LIBERTY	5,000.
THE NATIONAL WWII MUSEUM 945 MAGAZINE STREET NEW ORLEANS, LA 70130	NONE	PUBLIC	TO HELP PRESERVE THE HISTORY OF WORLD WAR II	1,500.
Total from continuation sheets				

**CELESTE AND KURT ZUCH FAMILY
FOUNDATION, INC.**

20-2025163

Part XV **Supplementary Information**

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
THE SHELTON SCHOOL 15720 HILLCREST ROAD DALLAS, TX 75248	NONE	PUBLIC	TO EMPOWER THE LIVES OF THOSE WHO LEARN DIFFERENTLY.	5,000.
THEOLOGICAL HORIZONS 1841 UNIVERSITY CIRCLE CHARLOTTESVILLE, VA 22903	NONE	PUBLIC	TO SUPPORT CHRISTIANS AND SEEKERS IN ACADEMIA	800.
UNION GOSPEL MISSION 3211 IRVING BOULEVARD DALLAS, TX 75247	NONE	PUBLIC	SUPPORT FOR RELIGIOUS INITIATIVES	100.
UNIVERSITY OF VIRGINIA BICENTENNIAL FUND PO BOX 400314 CHARLOTTESVILLE, VA 22904-4314	NONE	PUBLIC	TO STRIVE TO TRAIN YOUNG PEOPLE FOR LEADERSHIP ROLES IN THEIR COMMUNITIES.	10,000.
VETERANS OF FOREIGN WARS 406 W. 34TH ST. KANSAS CITY, MO 64111	NONE	PUBLIC	TO FOSTER CAMARADERIE AMOUNG U.S. VETERANS OF OVERSEES CONFLICTS.	100.
VIRGINIA ATHLETICS FOUNDATION PO BOX 400833 CHARLOTTESVILLE, VA 22904	NONE	PUBLIC	IN SUPPORT OF THE ATHLETICS PROGRAM	800.
VIRGINIA TECH ATHLETICS FOUNDATION P.O. BOX 10307 BLACKSBURG, VA 24062	NONE	PUBLIC	IN SUPPORT OF THE ATHLETICS PROGRAM	2,000.
VIRGINIA TECH FOUNDATION 902 PRICES FORK ROAD SUITE 4500 BLACKSBURG, VA 24061	NONE	PUBLIC	TO SUPPORT BUSINESS IT MAJOR & PAMPLIN COLLEGE	10,000.
WOUNDED WARRIOR PROJECT 4899 BELFORT ROAD, SUITE 300 JACKSONVILLE, FL 32256	NONE	PUBLIC	SUPPORT FOR WOUNDED VETERANS	250.
Total from continuation sheets				

Part XV Supplementary Information

3a Grants and Contributions Paid During the Year Continuation of Purpose of Grant or Contribution

NAME OF RECIPIENT - ARMSTRONG ELEMENTARY PTA

TO PROVIDE A POSITIVE AND NURTURING ENVIRONMENT AND FLEXIBLE STRUCTURE
WHICH ENABLES CHILDREN TO GROW AND EXPERIENCE DAILY SUCCESS.

NAME OF RECIPIENT - FOLDS OF HONOR

TO PROVIDE EDUCATIONAL SCHOLARSHIPS TO SPOUSES AND CHILDREN OF
AMERICA'S FALLEN AND DISABLED SERVICE-MEMBERS.

NAME OF RECIPIENT - HIGHLAND PARK MIDDLE SCHOOL PTA

TO PROVIDE A POSITIVE AND NURTURING ENVIRONMENT AND FLEXIBLE STRUCTURE
WHICH ENABLES CHILDREN TO GROW AND EXPERIENCE DAILY SUCCESS.

NAME OF RECIPIENT - NATIONAL TEXAS GIVING DAY

TO RAISE AWARENESS OF NONPROFITS TO A MOVEMENT THAT HAS IGNITED A BROAD
CULTURE OF COMMUNITY-WIDE GIVING.

NAME OF RECIPIENT - PER SCHOLAS INC.

TO OPEN DOORS TO TRANSFORMITIVE TECH CAREERS FOR INDIVIDUALS FROM OFTEN
OVERLOOKED COMMUNITIES.

Schedule B(Form 990, 990-EZ,
or 990-PF)Department of the Treasury
Internal Revenue Service**Schedule of Contributors**

- ▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.
▶ Go to www.irs.gov/Form990 for the latest information.

OMB No 1545-0047

2017

Name of the organization

CELESTE AND KURT ZUCH FAMILY
FOUNDATION, INC.

Employer identification number

20-2025163

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

☐

501(c)() (enter number) organization

☐

4947(a)(1) nonexempt charitable trust not treated as a private foundation

☐

527 political organization

Form 990-PF

☒

501(c)(3) exempt private foundation

☐

4947(a)(1) nonexempt charitable trust treated as a private foundation

☐

501(c)(3) taxable private foundation

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

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

Special Rules☐

For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000, or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.☐For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. ▶ \$

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

LHA For Paperwork Reduction Act Notice, see the instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2017)

Name of organization

CELESTE AND KURT ZUCH FAMILY
FOUNDATION, INC.

Employer identification number

20-2025163

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	KURT A. ZUCH 3419 WESTMINSTER AVE #236 DALLAS, TX 75205	\$ 202,551.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization

Employer identification number

CELESTE AND KURT ZUCH FAMILY
FOUNDATION, INC.

20-2025163

Part II Noncash Property (see instructions) Use duplicate copies of Part II if additional space is needed

[illegible]

Name of organization

CELESTE AND KURT ZUCH FAMILY
FOUNDATION, INC.

Employer identification number

20-2025163

Part III

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

Use duplicate copies of Part III if additional space is needed

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

FORM 990-PF

DIVIDENDS AND INTEREST FROM SECURITIES

STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
RAYMOND JAMES	20,185.	0.	20,185.	19,662.	
RAYMOND JAMES	723.	0.	723.	723.	
RAYMOND JAMES	25,707.	25,707.	0.	0.	
TO PART I, LINE 4	46,615.	25,707.	20,908.	20,385.	

FORM 990-PF

ACCOUNTING FEES

STATEMENT 2

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	3,175.	0.		3,175.
TO FORM 990-PF, PG 1, LN 16B	3,175.	0.		3,175.

FORM 990-PF

TAXES

STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES	142.	142.		0.
EXCISE TAX	594.	0.		0.
TO FORM 990-PF, PG 1, LN 18	736.	142.		0.

FORM 990-PF

OTHER EXPENSES

STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
EVENTS	4,270.	0.		0.
TO FORM 990-PF, PG 1, LN 23	4,270.	0.		0.

FORM 990-PF

CORPORATE STOCK

STATEMENT 5

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
AMERICAN FUNDS INTL GROWTH & INC FD C	32,254.	37,871.
AMERICAN FUNDS CAPITAL INC BUILDER A	60,484.	65,970.
AMERICAN FUNDS CAPITAL INC BUILDER F2	169,084.	202,901.
INCOME FUND OF AMERICA CLASS F1	84,825.	117,384.
AMERICAN FUNDS NEW PERSPECTIVE F2	55,618.	66,186.
FRANKLIN INCOME FUND	49,025.	47,042.
FIDELITY ADVISOR NEW INSIGHTS FUND	142,128.	158,182.
EATON VANCE ATLANTA CAPITAL SMID CAP FUND CLASS C	12,040.	14,753.
FIDELITY ADVISOR CONSUMER STAPLES FUND CLASS C	55,496.	53,804.
PIMCO INCOME FUND CLASS A	86,137.	90,217.
EATON VANCE ATLANTA CAPITAL SMID CAP FUND CLASS I	59,005.	81,643.
JOHN HANCOCK INTERNATIONAL GROWTH FUND CLASS I	44,037.	62,768.
MFS BLENDED RESEARCH CORE EQUITY FUND CLASS I	6,485.	8,955.
BOEING COMPANY	18,021.	48,660.
TOTAL TO FORM 990-PF, PART II, LINE 10B	874,639.	1,056,336.

FORM 990-PF

LIST OF SUBSTANTIAL CONTRIBUTORS
PART VII-A, LINE 10

STATEMENT 6

NAME OF CONTRIBUTOR

ADDRESS

KURT A. ZUCH

3419 WESTMINSTER AVE #236
DALLAS, TX 75205

FORM 990-PF

PART XV - LINE 1A
LIST OF FOUNDATION MANAGERS

STATEMENT 7

NAME OF MANAGER

KURT A ZUCH

CELESTE B ZUCH

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 8

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

KURT A ZUCH
3419 WESTMINSTER, #236
DALLAS, TX 75205

TELEPHONE NUMBER

404-841-8855

FORM AND CONTENT OF APPLICATIONS

IN A LETTER TO MR. ZUCH EXPLAINING APPLICANT'S ORGANIZATION AND PURPOSE OF GRANT.

ANY SUBMISSION DEADLINES

NONE

RESTRICTIONS AND LIMITATIONS ON AWARDS

NONE

GENERAL EXPLANATION

STATEMENT 9

FORM/LINE IDENTIFIER AND DESCRIPTION/RETURN REFERENCE

FORM 990-PF, PART I, LINES 23 & 25 - ALLOCATION OF GRANT PAYMENTS

EXPLANATION:

THE 990-PF IS BEING AMENDED IN ORDER TO PROPERLY REFLECT GRANT ALLOCATIONS.

GENERAL EXPLANATION

STATEMENT 10

FORM/LINE IDENTIFIER AND DESCRIPTION/RETURN REFERENCE

FORM 990-PF, PART XV, LINE 3A - ALLOCATION OF GRANT PAYMENTS

EXPLANATION:

THE 990-PF IS BEING AMENDED IN ORDER TO PROPERLY REFLECT GRANT ALLOCATIONS.