

For calendar year 2017, or tax year beginning 01-01-2017, and ending 12-31-2017

Name of foundation MCCARTHEY FAMILY FOUNDATION		A Employer identification number 20-8067695	
Number and street (or P O box number if mail is not delivered to street address) 610 EAST SOUTH TEMPLE Room 200		Room/suite	B Telephone number (see instructions) (801) 578-1240
City or town, state or province, country, and ZIP or foreign postal code SALT LAKE CITY, UT 84102		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ 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) \$ 41,354,954	J Accounting method ☐ Cash ☒ Accrual ☐ Other (specify) (Part I, column (d) must be on cash basis)	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)				
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities . . .	989,884	989,884		
	5a Gross rents	217	217		
	b Net rental income or (loss) 217				
	6a Net gain or (loss) from sale of assets not on line 10 	855,320			
	b Gross sales price for all assets on line 6a 5,703,140				
	7 Capital gain net income (from Part IV, line 2) . . .		855,320		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule) 	-24,681	-24,681		
	12 Total. Add lines 1 through 11	1,820,740	1,820,740		
	13 Compensation of officers, directors, trustees, etc	194,850	97,425		97,425
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule) 	132	66		66
	c Other professional fees (attach schedule) 	115,019			115,019
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	 34,018	26,689		7,329
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings	31,705			31,705
	22 Printing and publications	20,347			20,347
	23 Other expenses (attach schedule) 	242,504	132,299		110,205
	24 Total operating and administrative expenses. Add lines 13 through 23	638,575	256,479		382,096
	25 Contributions, gifts, grants paid	2,513,568			2,513,568
	26 Total expenses and disbursements. Add lines 24 and 25	3,152,143	256,479		2,895,664
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-1,331,403			
	b Net investment income (if negative, enter -0-)		1,564,261		
	c Adjusted net income (if negative, enter -0-)				

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 (a) Book Value	End of year (b) Book Value (c) Fair Market Value		
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	510,375	-223,806	-223,806
	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 (attach schedule) ▶ _____ 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 (attach schedule)			
	b	Investments—corporate stock (attach schedule)			
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	34,777,403	34,220,869	41,562,478
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)	11,282	16,282	16,282	
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	35,299,060	34,013,345	41,354,954	
Liabilities	17	Accounts payable and accrued expenses	100	45,788	
	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)	100	45,788	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐ 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 ▶ ☒ and complete lines 27 through 31.				
	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	35,298,960	33,967,557	
30	Total net assets or fund balances (see instructions)	35,298,960	33,967,557		
31	Total liabilities and net assets/fund balances (see instructions) .	35,299,060	34,013,345		

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	35,298,960
2	Enter amount from Part I, line 27a	2	-1,331,403
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3	4	33,967,557
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	33,967,557

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a See Additional Data Table			
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 See Additional Data Table			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a See Additional Data Table			
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	855,320
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	10,061

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 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	3,366,751	38,785,068	000 086805
2015	2,160,693	42,247,349	000 051144
2014	2,645,452	43,296,796	000 061100
2013	2,703,667	42,170,407	000 064113
2012	2,395,873	41,106,637	000 058284
2 Total of line 1, column (d)			2 000 321446
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years			3 000 064289
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5			4 39,466,350
5 Multiply line 4 by line 3			5 2,537,252
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 15,643
7 Add lines 5 and 6			7 2,552,895
8 Enter qualifying distributions from Part XII, line 4			8 2,895,664

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 ☐ 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 ☒ and enter 1% of Part I, line 27b	1	15,643
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	
3	Add lines 1 and 2.	3	15,643
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	15,643
6	Credits/Payments		
a	2017 estimated tax payments and 2016 overpayment credited to 2017	6a	32,691
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	32,691
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	17,048
11	Enter the amount of line 10 to be Credited to 2018 estimated tax ☐ 17,048 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?	1a	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities</i>	1b	No
c Did the foundation file Form 1120-POL for this year?	1c	No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ☐ \$ _____ (2) On foundation managers ☐ \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities</i>	2	No
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>	3	No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	No
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? <i>If "Yes," attach the statement required by General Instruction T</i>	5	No
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ AK		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation</i>	8b	No
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2017 or the taxable year beginning in 2017 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>	9	No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	10	No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A	13	Yes	
14	The books are in care of Todd F Brashear CPA Telephone no (801) 578-1246			

Located at **610 E South Temple Suite 200 Salt Lake City UT** ZIP+4 **84102**

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 instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR). If "Yes," enter the name of the foreign country ▶	16	Yes	No

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

1a	During the year did the foundation (either directly or indirectly)		Yes	No
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? ☐ 1b			
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? ☐ 1c			No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2017, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2017? ☐ Yes ☒ 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). ☐ 2b			
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 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). ☐ Yes ☒ No 3b			
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4a			No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2017? 4b			No

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

5a	During the year did the foundation pay or incur any amount to (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No (4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions). ☐ Yes ☒ No (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No			
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? ☐ Yes ☒ No Organizations relying on a current notice regarding disaster assistance check here. ☐ 	5b		
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No <i>If "Yes," attach the statement required by Regulations section 53.4945–5(d)</i>			
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 <i>If "Yes" to 6b, file Form 8870</i>	6b		No
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	7b		

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).**

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
See Additional Data Table				

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	Title, and average hours per week (b) devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances

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

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
David J Remnick 257 West 86th Street Apt 11A New York, NY 10024	Lecture Series Speaker	75,000

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 NONE	0
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	39,340,496
b	Average of monthly cash balances.	1b	726,864
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	40,067,360
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets.	2	
3	Subtract line 2 from line 1d.	3	40,067,360
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	601,010
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	39,466,350
6	Minimum investment return. Enter 5% of line 5.	6	1,973,318

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	1,973,318
2a	Tax on investment income for 2017 from Part VI, line 5.	2a	15,643
b	Income tax for 2017 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	15,643
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	1,957,675
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	1,957,675
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	1,957,675

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	2,895,664
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	2,895,664
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	15,643
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	2,880,021

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				1,957,675
2 Undistributed income, if any, as of the end of 2017				
a Enter amount for 2016 only.				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2017				
a From 2012. 368,202				
b From 2013. 614,359				
c From 2014. 580,176				
d From 2015. 68,862				
e From 2016. 1,440,068				
f Total of lines 3a through e.	3,071,667			
4 Qualifying distributions for 2017 from Part XII, line 4 ▶ \$ <u>2,895,664</u>				
a Applied to 2016, but not more than line 2a				
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.				1,957,675
e Remaining amount distributed out of corpus	937,989			
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	4,009,656			
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				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).				
8 Excess distributions carryover from 2012 not applied on line 5 or line 7 (see instructions).	368,202			
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a	3,641,454			
10 Analysis of line 9				
a Excess from 2013. 614,359				
b Excess from 2014. 580,176				
c Excess from 2015. 68,862				
d Excess from 2016. 1,440,068				
e Excess from 2017. 937,989				

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 organization 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	Prior 3 years			(e) Total
	(a) 2017	(b) 2016	(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 organization had \$5,000 or more in assets at any time during the year—see instructions.)

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))
NONE

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. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed
Todd F Brashear Executive Director
610 East South Temple Ste 200
Salt Lake City, UT 84102
(801) 578-1246

b The form in which applications should be submitted and information and materials they should include
Grant request letter, supporting documentation, IRS tax-exempt determination letter

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	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> See Additional Data Table				
Total			3a	2,513,568
b <i>Approved for future payment</i>				
Total			3b	

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
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	989,884	
5 Net rental income or (loss) from real estate					
a Debt-financed property.					
b Not debt-financed property.			16	217	
6 Net rental income or (loss) from personal property					
7 Other investment income.			24	24,681	
8 Gain or (loss) from sales of assets other than inventory			18	855,320	
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).				1,820,740	
13 Total. Add line 12, columns (b), (d), and (e).			13		1,820,740

(See worksheet in line 13 instructions to verify calculations)

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

[illegible]

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		Yes	No
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash.	1a(1)		No
(2) Other assets.	1a(2)		No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization.	1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization.	1b(2)		No
(3) Rental of facilities, equipment, or other assets.	1b(3)		No
(4) Reimbursement arrangements.	1b(4)		No
(5) Loans or loan guarantees.	1b(5)		No
(6) Performance of services or membership or fundraising solicitations.	1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c		No
d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.			

(a) Line No	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here	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.	***** 2018-11-14 *****	May the IRS discuss this return with the preparer shown below (see instr)? ☒ Yes ☐ No
	Signature of officer or trustee	Date	Title

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN
	Todd F Brashear		2018-11-14		
	Firm's name ▶ Todd F Brashear CPA				Firm's EIN ▶
Firm's address ▶ 610 East South Temple 200 Salt Lake City, UT 84102					Phone no (801) 578-1246

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d			
List and describe the kind(s) of property sold (e g , real estate, (a) 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)
Invitation Homes	P	2016-01-01	2017-12-11
Harbor High Yield Bond	P	2016-07-27	2017-07-24
JPM US Large Cap Core Plus Fd	P	2016-12-15	2017-01-30
SPDR SP 500 ETF Trust	P	2016-07-27	2017-01-30
T Rowe Price New Asia	P	2016-12-20	2017-03-07
Ishares Russell Midcap Index	P	2014-11-20	2017-01-30
Ishares Russell Midcap Index	P	2014-11-20	2017-07-24
JPM Sm Cap Valued Fd	P	2014-11-20	2017-07-24
Vanguard Intm Trm Inv	P	2016-01-01	2017-07-24
Vanguard TRSE Europe ETF	P	2015-11-25	2017-02-17

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
12			12
68,912		66,889	2,023
58,470		57,341	1,129
68,833		65,628	3,205
5,398		4,986	412
167,709		153,158	14,551
111,390		95,018	16,372
391,281		356,336	34,945
980,064		979,322	742
706,960		727,235	-20,275

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			12
			2,023
			1,129
			3,205
			412
			14,551
			16,372
			34,945
			742
			-20,275

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

List and describe the kind(s) of property sold (e.g., real estate, (a) 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)
Harbor High Yield Bond	P	2016-01-01	2017-07-24
Ishares Russell Midcap Index Fd	P	2008-09-23	2017-07-24
JPM US Large Cap Core Plus	P	2016-01-01	2017-01-30
T Rowe Price New Asia	P	2016-01-01	2017-03-07
Providence Debt III	P	2016-01-01	2017-12-31
Paradigm Master Fund	P	2016-01-01	2017-12-31
CSFR	P	2017-01-01	2017-12-31
Providence Debt III	P	2017-01-01	2017-12-31
Paradigm Master Fund	P	2017-01-01	2017-12-31

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
635,364		657,687	-22,323
900,659		410,667	489,992
413,697		292,366	121,331
1,185,909		981,187	204,722
1,613			1,613
3,577			3,577
2			2
2,893			2,893
397			397

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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	
			-22,323
			489,992
			121,331
			204,722
			1,613
			3,577
			2
			2,893
			397

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation				
(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
Sarah J McCarthy	Director 002 00	0		
610 E South Temple Suite 200 Salt Lake City, UT 84102				
Thomas K McCarthy Jr	Director 002 00	0		
610 E South Temple Suite 200 Salt Lake City, UT 84102				
Philip G McCarthy	Director 002 00	0		
610 E South Temple Suite 200 Salt Lake City, UT 84102				
Maureen P McCarthy	Director 002 00	0		
610 E South Temple Suite 200 Salt Lake City, UT 84102				
Todd F Brashear	Executive Director 010 00	133,350		
610 E South Temple Suite 200 Salt Lake City, UT 84102				
John P O'Brien	Secretary Treasurer 002 00	61,500		
610 E South Temple Suite 200 Salt Lake City, UT 84102				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Ability Found2324 S Constitution Blvd West Valley City, UT 84119		PC	Equipment Placement Program	15,000
Alliance House1724 S Main Street Salt Lake City, UT 84115		PC	Program Funding	7,500
American Cancer Society 375 East 100 South 1st Floor Salt Lake City, UT 84111		PC	Cancer Research	25,000
Total ▶ 3a				2,513,568

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
American Civil Liberties Union of Utah 355 North 300 West Salt Lake City, UT 84103		PC	Program Funding	9,000
American Indian Services 3115 E Lion Lane Suite 320 Salt Lake City, UT 84121		PC	Program Funding	25,000
Art Access 230 South 500 West Suite 125 Salt Lake City, UT 84101		PC	Program Funding	7,000
Total ▶ 3a				2,513,568

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Bad Dog Arts824 South 400 West B129 Salt Lake City, UT 84101		PC	Program Funding	5,000
Ballet West50 West 200 South Suite 200 Salt Lake City, UT 84101		PC	Program Funding	50,000
Big Brothers Big Sisters of Utah 2121 S State St Suite 201 Salt Lake City, UT 84115		PC	Program Funding	5,160
Total ▶ 3a				2,513,568

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Boys & Girls Club of Greater Salt Lake PO Box 57071 Murray, UT 84107		PC	Capital Campaign	125,000
Building Youth Around the World 198 East 4500 South Murray, UT 84107		PC	Program Funding	1,000
Canines With a Cause 3970 South 2700 East Salt Lake City, UT 84124		PC	Program Funding	10,000
Total ▶ 3a				2,513,568

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Cathedral of the Madeleine 331 E South Temple Salt Lake City, UT 84111		PC	Program Funding	10,000
Carmel of the Immaculate Heart of Mary 5714 S Holladay Blvd Holladay, UT 84121		PC	Program Funding	25,000
Catholic Community Services 745 East 300 South Salt Lake City, UT 84102		PC	Program Funding	125,000
Total ▶ 3a				2,513,568

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Columbus Community Center 3495 S West Temple Salt Lake City, UT 84115		PC	Capital Campaign	50,000
Cosmic Nudge IncPO Box 150703 Ogden, UT 84415		PC	Program Funding	50,000
Epicenter 180 South Broadway PO Box 444 Green River, UT 84525		PC	Program Funding	4,000
Total ▶ 3a				2,513,568

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Eye Care 4 Kids - Utah 6911 South State Street Midvale, UT 84047		PC	Program Funding	10,000
Family Counseling Center 650 East 4500 South Suite 300 Murray, UT 84107		PC	Program Funding	10,000
Friends of Arches and Canyonlands PO Box 1680 Moab, UT 84532		PC	Program Funding	10,000
Total ▶ 3a				2,513,568

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Girl Scouts of Utah 445 East 4500 South Suite 125 Salt Lake City, UT 84107		PC	Program Funding	25,000
Golden Rule Project444 East 200 South Salt Lake City, UT 84111		PC	Program Funding	5,000
Gonzaga University502 East Boone Ave Spokane, WA 99258		PC	Capital Campaign	200,000
Total ▶ 3a				2,513,568

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Guadalupe School1385 North 1200 West Salt Lake City, UT 84116		PC	Education Funding	3,000
Herreshoff Marine Museum One Burnside Street PO Box 450 Bristol, RI 02809		PC	Seamanship Program Funding	10,000
Huntsman Cancer Foundation 500 Huntsman Way Salt Lake City, UT 84108		PC	Cancer Research	10,000
Total ▶ 3a				2,513,568

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Immigrant Legal Services 4055 South 700 East Suite 200 Salt Lake City, UT 84107		PC	Program Funding	5,000
JE Cosgriff Memorial School 2335 Redondo Ave Salt Lake City, UT 84108		PC	Tuition Assistance	7,500
Jewish Family Services 1111 E Brickyard Rd Ste 218 Salt Lake City, UT 84106		PC	Program Funding	7,500
Total ▶ 3a				2,513,568

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Judge Memorial Catholic High School 650 South 1100 East Salt Lake City, UT 84102		PC	Tuition Assistance	81,000
Kearns St Ann's Catholic School 430 East 2100 South Salt Lake City, UT 84115		PC	Tuition Assistance	268,000
Loveland Living Planet Aquarium 12033 S Lone Peak Pkwy Draper, UT 84020		PC	Program Funding	5,000
Total ▶ 3a				2,513,568

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
National Ability Center1000 Ability Way Park City, UT 84060		PC	Program Funding	10,000
National Multiple Sclerosis Society 1440 Foothill Dr Suite 200 Salt Lake City, UT 84108		PC	Medical Research Program Funding	117,700
National Speech & Debate Association 401 Railroad Place West Des Moines, IA 50265		PC	Program Funding	5,000
Total ▶ 3a				2,513,568

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Nuzzles & Co6466 N Highway Road Peoa, UT 84061		PC	Program Funding	5,000
Ogden-Weber Tech College Foundation 200 N Washington Blvd Ogden, UT 84404		PC	Program Funding	5,000
Our Lady Lourdes Catholic School 1065 East 700 South Salt Lake City, UT 84102		PC	Tuition Assistance	6,000
Total ▶ 3a				2,513,568

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
People Helping People Inc 205 North 400 West Salt Lake City, UT 84103		PC	Program Funding	5,000
Playworks Education Energized 308 East 4500 South Suite 120 Salt Lake City, UT 84107		PC	Program Funding	10,000
Pregnancy Resource Center of Salt Lake 644 South 900 East Salt Lake City, UT 84102		PC	Program Funding	4,000
Total ▶ 3a				2,513,568

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Race Swami2751 South 2700 East Salt Lake City, UT 84109		PC	Program Funding	20,000
Rape Recovery Center 975 S West Temple Salt Lake City, UT 84101		PC	Program Funding	5,000
Red Butte Gardens300 Wakara Way Salt Lake City, UT 84108		PC	Program Funding	16,508
Total ▶ 3a				2,513,568

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Redevelopment Agency of Salt Lake City 451 South State Street Room 418 Salt Lake City, UT 84111		PC	Capital Campaign	250,000
RiteCare of Utah650 E South Temple Salt Lake City, UT 84102		PC	Therapy Program Funding	8,700
Ronald McDonald House Charities 935 E South Temple Salt Lake City, UT 84102		PC	Program Funding	8,000
Total ▶ 3a				2,513,568

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
Rowland Hall720 Guardsman Way Salt Lake City, UT 84108		PC	Capital Campaign	100,000
Saint Joseph Catholic High School 1790 Lake Street Ogden, UT 84401		PC	Tuition Assistance	50,000
Saint Vincent de Paul School 1385 E Spring Lane Salt Lake City, UT 84117		PC	Tuition Assistance	3,000
Total ▶ 3a				2,513,568

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Salt Lake Acting Company 168 West 500 North Salt Lake City, UT 84103		PC	Program Funding	7,500
Senior Charity Care Foundation PO Box 744 Kaysville, UT 84037		PC	Program Funding	5,000
Snowbird Sports Education Foundation 3165 East Millrock Dr Suite 190 Holladay, UT 84121		PC	Program Funding	15,000
Total ▶ 3a				2,513,568

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Spy Hop669 S West Temple Suite 202 Salt Lake City, UT 84101		PC	Program Funding	25,000
Success in Education Foundation 111 E Broadway Suite 900 Salt Lake City, UT 84111		PC	Code To Success Education Program	10,000
Summit Land ConservancyPO Box 1775 Park City, UT 84060		PC	Environmental Program Funding	5,000
Total ▶ 3a				2,513,568

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Tamarisk CoalitionPO Box 1907 Grand Junction, CO 81502		PC	Environmental Program Funding	10,000
The Haven974 E South Temple Salt Lake City, UT 84102		PC	Transitional Housing Substance Abuse Programs	100,000
The INN Between340 S Goshen St Salt Lake City, UT 84104		PC	Program Funding	25,000
Total ▶ 3a				2,513,568

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
The Leonardo209 East 500 South Salt Lake City, UT 84111		PC	Program Funding	25,000
The Madeleine Choir School 205 First Avenue Salt Lake City, UT 84103		PC	Tuition Assistance	75,000
The Mundi ProjectPO Box 520696 Salt Lake City, UT 84152		PC	Program Funding	7,500
Total ▶ 3a				2,513,568

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
The Salt Lake City Mission 1151 S Redwood Rd Suite 106 Salt Lake City, UT 84110		PC	Program Funding	5,000
The Sharing Place1695 East 3300 South Salt Lake City, UT 84106		PC	Program Funding	5,000
Therapy Animals of Utah 2459 West 300 North Provo, UT 84601		PC	Program Funding	3,000
Total ▶ 3a				2,513,568

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Tracy Aviary589 East 1300 South Salt Lake City, UT 84105		PC	Program Funding	25,000
Ulster Project Utah806 Northpoint Dr Salt Lake City, UT 84103		PC	Program Funding	4,000
University of Utah Alumni Association 155 S Central Campus Dr Salt Lake City, UT 84112		PC	Capital Campaign	35,000
Total ▶ 3a				2,513,568

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
University of Utah School of Music 1375 East Presidential Circle Salt Lake City, UT 84112		PC	Piano Outreach Program Funding	16,500
Utah Community Action 1307 South 900 West Salt Lake City, UT 84104		PC	Program Funding	25,000
Utah FACES511 West 3900 South Salt Lake City, UT 84123		PC	Animal Services Funding	5,000
Total ▶ 3a				2,513,568

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
Utah Food Bank3150 South 900 West Salt Lake City, UT 84119		PC	Program Funding	5,000
Utah FoundationPO Box 387 Salt Lake City, UT 84110		PC	Program Funding	10,000
Utah Open Lands Conservation Association 1488 S Main St Salt Lake City, UT 84115		PC	Conservation Program Funding	10,000
Total ▶ 3a				2,513,568

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Utah Police Civilian Association 230 West 200 South Suite 2608 Salt Lake City, UT 84101		PC	Program Funding	5,000
Utah SymphonyUtah Opera 123 W South Temple Salt Lake City, UT 84101		PC	Musical Arts Program Funding	10,000
Valley Behavioral Health 5965 South 900 East Salt Lake City, UT 84121		PC	Program Funding	15,000
Total ▶ 3a				2,513,568

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Voices for Utah Children 747 E South Temple Suite 100 Salt Lake City, UT 84102		PC	Program Funding	2,500
Volunteers of America Utah 435 West Bearcat Dr Salt Lake City, UT 84115		PC	Program Funding	52,500
Wasatch Community Gardens 824 South 400 West Suite 127 Salt Lake City, UT 84101		PC	Program Funding	15,000
Total 				2,513,568
3a				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
Weber State University 1265 Village Drive Dept 4018 Ogden, UT 84408		PC	Athletics Excellence Scholarship Fund	25,000
West Ridge Academy 5500 West Bagley Park Road West Jordan, UT 84081		PC	Program Funding	10,000
Westminster College 1840 South 1300 East Salt Lake City, UT 84105		PC	Emergency Student Relief Scholarship Programs	75,000
Total ▶ 3a				2,513,568

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Women of the World 3347 South Main Street Salt Lake City, UT 84115		PC	Program Funding	5,000
Youthlinc1140 East Brickyard Rd Ste 76 Salt Lake City, UT 84106		PC	Program Funding	2,500
YWCA Utah322 East 300 South Salt Lake City, UT 84111		PC	Program Funding	3,000
Total ▶ 3a				2,513,568

TY 2017 Accounting Fees Schedule**Name:** MCCARTHEY FAMILY FOUNDATION**EIN:** 20-8067695**Software ID:** 17005317**Software Version:** 18.2.0.0**Accounting Fees Schedule**

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Payroll Perfect, Inc	132	66		66

TY 2017 All Other Program Related Investments Schedule**Name:** MCCARTHEY FAMILY FOUNDATION**EIN:** 20-8067695**Software ID:** 17005317**Software Version:** 18.2.0.0

Category	Amount
N/A	

TY 2017 Explanation of Non-Filing with Attorney General Statement

Name: MCCARTHEY FAMILY FOUNDATION

EIN: 20-8067695

Software ID: 17005317

Software Version: 18.2.0.0

Statement:

The Attorney General for the State of Alaska does not require a copy of Form 990-PF to be furnished.

TY 2017 General Explanation Attachment

Name: MCCARTHEY FAMILY FOUNDATION

EIN: 20-8067695

Software ID: 17005317

Software Version: 18.2.0.0

TY 2017 Investments - Other Schedule**Name:** MCCARTHEY FAMILY FOUNDATION**EIN:** 20-8067695**Software ID:** 17005317**Software Version:** 18.2.0.0**Investments Other Schedule 2**

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
JPM Structured Equity Notes	AT COST	604,067	1,078,362
Accrued Interest Dividends	AT COST	65,630	65,630
JPMorgan Managed Equity Portfolio	AT COST	32,423,291	39,277,291
Paradigm Hedge Funds	AT COST	341,273	421,569
Next IT Corporation	AT COST	500,590	500,590
Starwood Opportunities Fund VIII, LLC	AT COST	286,018	219,036

TY 2017 Other Assets Schedule**Name:** MCCARTHEY FAMILY FOUNDATION**EIN:** 20-8067695**Software ID:** 17005317**Software Version:** 18.2.0.0**Other Assets Schedule**

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
Statuary	11,282	16,282	16,282

TY 2017 Other Expenses Schedule**Name:** MCCARTHEY FAMILY FOUNDATION**EIN:** 20-8067695**Software ID:** 17005317**Software Version:** 18.2.0.0**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Portfolio Deductions	7,217	7,217		
Rent/Lease Expense	57,843			57,843
Licenses Fees	393			393
Meals Entertainment	13,399			13,399
Section 1256 Net Loss	290	290		
Investment Interest Expense	2,731	2,731		
Commissions Investment Fees	121,090	121,090		
Insurance	5,109			5,109
Catering Expense	24,885			24,885
Contract Labor	2,500			2,500

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Security	850			850
Supplies	411			411
Postage	25			25
Depletion Expense	971	971		
Advertising	4,602			4,602
Miscellaneous Expense	188			188

TY 2017 Other Income Schedule**Name:** MCCARTHEY FAMILY FOUNDATION**EIN:** 20-8067695**Software ID:** 17005317**Software Version:** 18.2.0.0**Other Income Schedule**

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
From Investment Schedules K-1	-29,943	-29,943	
Other Income	5,262	5,262	

TY 2017 Other Professional Fees Schedule**Name:** MCCARTHEY FAMILY FOUNDATION**EIN:** 20-8067695**Software ID:** 17005317**Software Version:** 18.2.0.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Mary Kay Lazarus Public Relations, Inc	35,906			35,906
Cardon-Ferro Creative	2,613			2,613
Jeffrey D Allred	1,500			1,500
David J Remnick	75,000			75,000

TY 2017 Taxes Schedule**Name:** MCCARTHEY FAMILY FOUNDATION**EIN:** 20-8067695**Software ID:** 17005317**Software Version:** 18.2.0.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Excise Tax on investment income	6,285	6,285		
Payroll taxes	14,657	7,328		7,329
Foreign dividend taxes	13,076	13,076		