

Form 990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

2017

Open to Public
Inspection

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

<p>Name of foundation JOHN STAUFFER CHARITABLE TRUST</p> <p>Number and street (or P O box number if mail is not delivered to street address) 301 N LAKE AVE SUITE 1000</p> <p>City or town, state or province, country, and ZIP or foreign postal code PASADENA, CA 91101</p> <p>G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change</p> <p>H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation</p> <p>I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ► \$ 54,776,923</p>		<p>A Employer identification number 23-7434707</p> <p>B Telephone number (see instructions) (626) 793-9400</p> <p>C If exemption application is pending, check here ► <input type="checkbox"/></p> <p>D 1. Foreign organizations, check here ► <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation ► <input type="checkbox"/></p> <p>E If private foundation status was terminated under section 507(b)(1)(A), check here ► <input type="checkbox"/></p> <p>F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ► <input type="checkbox"/></p>				
		<p>J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____</p> <p>(Part I, column (d) must be on cash basis)</p>		<p>(a) Revenue and expenses per books</p> <p>(b) Net investment income</p> <p>(c) Adjusted net income</p> <p>(d) Disbursements for charitable purposes (cash basis only)</p>		
Revenue	1	Contributions, gifts, grants, etc., received (attach schedule)				
	2	Check ► <input checked="" 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	1,416,953	1,416,953		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	2,300,035			
	b	Gross sales price for all assets on line 6a	9,017,552			
	7	Capital gain net income (from Part IV, line 2)		2,300,035		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
b	Less Cost of goods sold					
c	Gross profit or (loss) (attach schedule)					
11	Other income (attach schedule)					
12	Total. Add lines 1 through 11	3,716,988	3,716,988			
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	467,355	93,471	373,885	
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)	7,476		7,476	
	b	Accounting fees (attach schedule)	31,250		31,250	
	c	Other professional fees (attach schedule)	142,047	142,047		
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	121,509	46,429	80	
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)	114,300	114,300		
	24	Total operating and administrative expenses.				
	Add lines 13 through 23	883,937	396,247	412,691		
25	Contributions, gifts, grants paid	2,323,500		2,323,500		
26	Total expenses and disbursements. Add lines 24 and 25	3,207,437	396,247	2,736,191		
27	Subtract line 26 from line 12					
a	Excess of revenue over expenses and disbursements	509,551				
b	Net investment income (if negative, enter -0-)		3,320,741			
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	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		2,145,409	1,803,323	1,803,323
	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)		18,260,802	17,375,529	35,951,150
	c Investments—corporate bonds (attach schedule)		15,268,944	17,002,450	17,013,346
	11 Investments—land, buildings, and equipment basis ►				
	Less accumulated depreciation (attach schedule) ►				
	12 Investments—mortgage loans		11,046	8,940	9,102
	13 Investments—other (attach schedule)				
	14 Land, buildings, and equipment basis ►				
	Less accumulated depreciation (attach schedule) ►				
	15 Other assets (describe ► _____)		2	2	2
	16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)		35,686,203	36,190,244	54,776,923
Liabilities	17 Accounts payable and accrued expenses				
	18 Grants payable				
	19 Deferred revenue				
	20 Loans from officers, directors, trustees, and other disqualified persons				
	21 Mortgages and other notes payable (attach schedule)				
	22 Other liabilities (describe ► _____)				
	23 Total liabilities (add lines 17 through 22)		0		
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		35,686,203	36,190,244	
	28 Paid-in or capital surplus, or land, bldg , and equipment fund				
	29 Retained earnings, accumulated income, endowment, or other funds				
	30 Total net assets or fund balances (see instructions)		35,686,203	36,190,244	
	31 Total liabilities and net assets/fund balances (see instructions)		35,686,203	36,190,244	

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	35,686,203
2	Enter amount from Part I, line 27a	2	509,551
3	Other increases not included in line 2 (itemize) ►	3	
4	Add lines 1, 2, and 3	4	36,195,754
5	Decreases not included in line 2 (itemize) ►	5	5,510
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	36,190,244

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.)
1 a CHARLES SCHWAB - SECURITIES			P	2017-01-01	2017-12-31
b CHARLES SCHWAB - SECURITIES			P	2017-01-01	2017-12-31
c CHARLES SCHWAB - SECURITIES			P	2017-01-01	2017-12-31
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 1,290,205		1,332,782	-42,577		
b 7,725,293		5,382,681	2,342,612		
c 2,054		2,054			
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) 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			-42,577		
b			2,342,612		
c					
d					
e					
2 Capital gain net income or (net capital loss)		If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7			
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)					
If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8					
2			2,300,035		
3					

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

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

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

 Yes No

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

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

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	2,378,208	49,214,605	0 04832
2015	2,256,185	49,511,651	0 04557
2014	2,332,110	49,511,806	0 04710
2013	1,489,301	46,654,463	0 03192
2012	822,264	50,865,701	0 01617
2 Total of line 1, column (d)			0 189081
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			0 037816
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5			51,990,677
5 Multiply line 4 by line 3			1,966,079
6 Enter 1% of net investment income (1% of Part I, line 27b)			33,207
7 Add lines 5 and 6			1,999,286
8 Enter qualifying distributions from Part XIII, line 4			2,736,191

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)	1	33,207		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ► <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b				
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)				
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	2			
3	Add lines 1 and 2.	3	33,207		
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	33,207		
6	Credits/Payments				
a	2017 estimated tax payments and 2016 overpayment credited to 2017	6a	110,989		
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	110,989		
8	Enter any penalty for underpayment of estimated tax Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8			
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9			
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	77,782		
11	Enter the amount of line 10 to be Credited to 2018 estimated tax ►	77,782	Refunded ►	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?	1a	Yes	No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)?	1b	Yes	No
<i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities</i>				
c	Did the foundation file Form 1120-POL for this year?	1c	Yes	No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ► \$ _____ (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	Yes	No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>	3	Yes	No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	Yes	No
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b	Yes	No
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T</i>	5	Yes	No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	No
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	7	Yes	No
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ►CA			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation</i>	8b	Yes	No
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2017 or the taxable year beginning in 2017 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>	9	Yes	No
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	10	Yes	No

Part VII-A Statements Regarding Activities (continued)

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

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

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

Website address ►GUIDESTAR.ORG

14 The books are in care of ►LAGERLOF SENECA ET AL Telephone no ►

Located at ►301 N LAKE AVENUE SUITE 1000 PASADENA CA

ZIP+4 ►91101

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? 16 Yes No

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

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

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

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

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

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

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

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

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

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

b If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here. ► □ 1b No

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 ► 2016, 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 Yes

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). 3b No

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))?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
	(4) Provide a grant to an organization other than a charitable, etc , organization described in section 4945(d)(4)(A)? (see instructions).	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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. ►			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? <i>If "Yes," attach the statement required by Regulations section 53 4945-5(d)</i>	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <i>If "Yes" to 6b, file Form 8870</i>			6b
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?			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
MICHAEL R WHALEN 531 S MARENGO AVENUE PASADENA, CA 91101	Trustee 10 00	155,785		
JOHN F BRADLEY 180 SOUTH LAKE AVE SUITE 440 PASADENA, CA 91101	Trustee 10 00	155,785		
TIMOTHY J GOSNEY 301 N LAKE AVENUE SUITE 1000 PASADENA, CA 91101	Trustee 10 00	155,785		
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	Contributions to employee benefit plans and deferred compensation (d)	Expense account, (e) other allowances
NONE				
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		
EVERETT HARRIS & CO 26522 LA ALAMEDA SUITE 270 MISSION VIEJO, CA 92691	INVESTMENT ADVICE	142,047		
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				
2				
3				
4				
Part IX-B Summary of Program-Related Investments (see instructions)				
Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2				Amount
1				
2				
All other program-related investments See instructions				
3				
Total. Add lines 1 through 3 ►				

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	50,806,217
b	Average of monthly cash balances.	1b	1,976,194
c	Fair market value of all other assets (see instructions).	1c	2
d	Total (add lines 1a, b, and c).	1d	52,782,413
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	
3	Subtract line 2 from line 1d.	3	52,782,413
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	791,736
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	51,990,677
6	Minimum investment return. Enter 5% of line 5.	6	2,599,534

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

1	Minimum investment return from Part X, line 6.	1	2,599,534
2a	Tax on investment income for 2017 from Part VI, line 5.	2a	33,207
b	Income tax for 2017 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	33,207
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	2,566,327
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	2,566,327
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	2,566,327

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	2,736,191
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	2,736,191
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 (see instructions).	5	33,207
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	2,702,984
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				2,566,327
2 Undistributed income, if any, as of the end of 2017			2,205,462	
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.				
b From 2013.				
c From 2014.				
d From 2015.				
e From 2016.				
f Total of lines 3a through e.				
4 Qualifying distributions for 2017 from Part XII, line 4 ► \$ 2,736,191			2,205,462	
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).	0			
d Applied to 2017 distributable amount.				530,729
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2017 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b Taxable amount—see instructions				
e Undistributed income for 2016 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2017 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2018.				2,035,598
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)				
8 Excess distributions carryover from 2012 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a.				
10 Analysis of line 9				
a Excess from 2013.				
b Excess from 2014.				
c Excess from 2015.				
d Excess from 2016.				
e Excess from 2017.				

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

1a	If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2017, enter the date of the ruling. ►			
b	Check box to indicate whether the organization is a private operating foundation described in section <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 4942(j)(5)			
2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.			
b	85% of line 2a.			
c	Qualifying distributions from Part XII, line 4 for each year listed.			
d	Amounts included in line 2c not used directly for active conduct of exempt activities.			
e	Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c.			
3	Complete 3a, b, or c for the alternative test relied upon			
a	"Assets" alternative test—enter			
(1)	Value of all assets.			
(2)	Value of assets qualifying under section 4942(j)(3)(B)(i)			
b	"Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.			
c	"Support" alternative test—enter			
(1)	Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties).			
(2)	Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).			
(3)	Largest amount of support from an exempt organization			
(4)	Gross investment income			

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

- a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))
- b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

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

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

- a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed

TIMOTHY GOSNEY
301 N LAKE AVENUE SUITE 1000
PASADENA, CA 91101
(626) 793-9400
TGOSNEY@LAGERLOF.COM

- b The form in which applications should be submitted and information and materials they should include

A LETTER STATING THE PURPOSE OF THE APPLICATION AND AMOUNT, TAX EXEMPT STATUS FROM IRS AND STATE AUTHORITIES AND IRS PRIVATE FOUNDATION RULING GUIDELINES ARE AVAILABLE UPON REQUEST

- 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

AWARDS MADE TO HOSPITALS, MEDICAL CENTERS, COLLEGES & UNIVERSITIES IN CA

Part XV Supplementary Information (continued)

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

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
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	1,416,953
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					2,300,035
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).				1,416,953	2,300,035
13 Total. Add line 12, columns (b), (d), and (e).				13	3,716,988
(See worksheet in line 13 instructions to verify calculations.)					

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

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
UNIVERSITY OF PACIFIC 3601 PACIFIC AVENUE STOCKTON, CA 95211	NONE	COLLEGE	ENDOWMENT FOR SUMMER RESEARCH PROGRAM IN CHEMISTRY	100,000
UNIVERSITY OF REDLANDS PO BOX 3080 REDLANDS, CA 92373	NONE	COLLEGE	ENDOWMENT FOR SUMMER RESEARCH PROGRAM IN CHEMISTRY	200,000
HARVEY MUDD COLLEGE 301 PLATT BLVD CLAREMONT, CA 91711	NONE	COLLEGE	ENDOWMENT FOR CHAIR IN CHEMISTRY	300,000
Total				2,323,500
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				
EISENHOWER MEDICAL CENTER 39000 BOB HOPE DRIVE RANCHO MIRAGE, CA 92270	NONE	MEDICAL	PURCHASE AND INSTALLATION OF NEW INTERVENTIONAL RADIOLOGY LAB	200,000
GOOD SAMARITAN 1225 WILSHIRE BOULEVARD LOS ANGELES, CA 90017	NONE	HOSPITAL	PARTIALLY FUND RENOVATION OF TWO ELECTROPHYSIOLOGY LABS	100,000
POMONA COLLEGE 550 N COLLEGE AVE CLAREMONT, CA 91711	NONE	COLLEGE	ENDOWMENT FOR SUMMER RESEARCH PROGRAM IN CHEMISTRY	63,500
Total				2,323,500
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				
CALIFORNIA INSTITUTE OF TECHNOLOGY 1200 EAST CALIFORNIA BLVD PASADENA, CA 91125	NONE	COLLEGE	ENDOWMENT FOR SUMMER RESEARCH PROGRAM IN CHEMISTRY AND CHEMICAL ENGINEERING	200,000
PEPPERDINE UNIVERSITY 245255 PACIFIC COAST HIGHWAY MALIBU, CA 90265	NONE	COLLEGE	ENDOWMENT FOR SUMMER RESEARCH PROGRAM IN CHEMISTRY	200,000
UC BERKELEY BERKELEY CA 420 LATIMER HALL BERKELEY, CA 94720	NONE	COLLEGE	ENDOWMENT FOR SUMMER RESEARCH PROGRAM IN CHEMISTRY	100,000
Total				2,323,500
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				
AZUSA PACIFIC UNIVERSITY 901 E ALOSTA AVENUE AZUSA, CA 91702	NONE	COLLEGE	ENDOWMENT FOR SUMMER RESEARCH PROGRAM IN CHEMISTRY AND BIOCHEMISTRY	60,000
CHILDRENS HOSPITAL OF LOS ANGELES 4650 SUNSET BLVD PO BOX 54700 LOS ANGELES, CA 90054	NONE	HOSPITAL	GRANT TO SUPPORT PATIENT CARE FOR CANCER AND BLOOD DISEASES	500,000
HARVEY MUDD COLLEGE 301 PLATT BOULEVARD CLAREMONT, CA 91711	NONE	COLLEGE	ENDOWMENT FOR CHAIR IN CHEMISTRY	300,000
Total				2,323,500
3a				

TY 2017 Accounting Fees Schedule

Name: JOHN STAUFFER CHARITABLE TRUST**EIN:** 23-7434707**Software ID:** 17005038**Software Version:** 2017v2.2

Accounting Fees Schedule

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CALDWELL, BEC	14,000	0	0	14,000
HKG, LLP	17,250	0	0	17,250

TY 2017 Investments Corporate Bonds Schedule**Name:** JOHN STAUFFER CHARITABLE TRUST**EIN:** 23-7434707**Software ID:** 17005038**Software Version:** 2017v2.2**Investments Corporate Bonds Schedule**

Name of Bond	End of Year Book Value	End of Year Fair Market Value
YUM BRANDS 3.875% DUE 11/1/20	246,965	255,000
AMGEN INC 3.875% DUE 11/15/21	248,969	261,135
ENERGIZER HOLDING 4.7% DUE 05/19/21	509,831	514,375
FORD MTR CREDIT NOTES 5.0% DUE 05/15/18	251,141	252,548
WACHOVIA CAP FLT 1976 NOTES DUE PERP MTY	480,224	503,125
BAIDU INC 3.25% DUE 8/6/18	502,050	502,289
BANK OF AMERICA NOTES VAR 33 DUE 7/11/33	500,020	325,513
SAFEWAY INC NOTES 5% DUE 8/15/19	610,890	606,000
AMERICAN TOWER CORP 3.4% DUE 02/15/19	504,130	505,783
DR PEPPER SNAPPLE G 2% DUE 01/15/20	491,792	495,768
GILEAD SCIENCES 2.05% DUE 04/01/19	499,093	500,037
INGERSOLL RAND 2.625% DUE 05/01/20	499,955	500,238
WESTERN UNION CO 3.65% DUE 08/22/18	502,691	504,060
HCA INC. 4.25% DUE 10/15/19	507,750	510,625
HYATT HOTELS 3.37% DUE 07/15/23	475,991	510,139
NETFLIX INC. 5.375% DUE 02/01/21	513,159	526,875
BRINKER INT'L 2.6% DUE 9/15/19	500,517	499,523
CENTURYLINK INC. 6.15% DUE 9/15/19	516,676	517,500
DELL, INC. 5.65% DUE 4/15/18	504,042	504,375
DISH DBS 5.125% DUE 5/1/20	500,014	511,250

Investments Corporate Bonds Schedule

Name of Bond	End of Year Book Value	End of Year Fair Market Value
GENERAL ELECTRIC CAP FIT. PERP BOND	506,253	611,240
ICAHN ENT. 6.0% DUE 8/1/20	1,015,832	1,025,000
NCR CORP. 5.0% DUE 7/15/22	436,739	437,871
PEIDMONT OP. 4.45% DUE 12/15/23	520,466	520,739
WASH POST 7.25% DUE 2/1/19	524,460	518,387
BECTON DICKINSON 3.125% DUE 11/18/21	502,146	502,701
DANA, INC. 6% DUE 9/15/23	521,184	521,875
DAVITA INC. 5.75% DUE 8/15/22	1,031,542	1,027,500
INGRAM MICRO 5 5% DUE 8/10/22	496,897	493,750
NCR CORP. 6.375% DUE 12/15/23	536,554	522,500
SPEEDWAY MOTORS 5.125% DUE 2/1/23	1,038,209	1,027,500
SPRINT CORP 6% DUE 11/15/1	506,268	498,125

TY 2017 Investments Corporate Stock Schedule**Name:** JOHN STAUFFER CHARITABLE TRUST**EIN:** 23-7434707**Software ID:** 17005038**Software Version:** 2017v2.2

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ABBOTT LABORATORIES	236,333	570,700
ALPHABET INC. (GOOGLE, INC.)	389,923	2,415,806
JOHNSON & JOHNSON	449,858	1,397,200
PEPSICO, INC.	392,257	959,360
UNITED PARCEL SERVICE CLASS B	723,778	1,191,500
MICROSOFT CORP	588,896	1,796,340
WAL-MART STORES, INC.	345,762	790,000
APPLE INC.	219,531	2,487,681
COSTCO WHOLESALE CORP	236,759	930,600
MCDONALDS CORP	222,904	860,600
1/100 BERKSHIRE HATHAWAY	1,266,352	2,976,000
CHEVRON CORP	685,147	1,001,520
NESTLE	840,402	1,805,370
NOVO-NORDISK A-S ADR F	240,937	1,261,245
UNILEVER N V NY SHS	645,267	1,106,800
COLGATE-PALMOLIVE	330,519	641,325
NOVARTIS AG	279,437	419,800
NIKE INC CLASS B	413,075	1,188,450
WALT DISNEY CO.	298,471	1,075,100
LINDT & SPRUENGLI AG	359,125	610,695
3M	433,893	706,110
BANK OF AMERICA CORP	602,681	1,180,800
EXXON MOBIL CORP	564,920	627,300
TJX COMPANIES	718,680	764,600
VANGUARD HEALTH CARE	1,017,934	1,233,120
AMAZON INC.	274,668	467,788
FACEBOOK INC.	516,785	705,840
US BANCORP	588,415	750,120
WELLS FARGO	592,183	728,040
ISHARES CORE MSCI	1,219,065	1,479,400

Name of Stock	End of Year Book Value	End of Year Fair Market Value
STARBUCKS	551,391	574,300
FACTSET RESEARCH SYS	489,441	578,280
ANHEUSER BUSCH	640,740	669,360

TY 2017 Legal Fees Schedule

Name: JOHN STAUFFER CHARITABLE TRUST

EIN: 23-7434707

Software ID: 17005038

Software Version: 2017v2.2

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LAGERLOF, SENECA, GOSNEY & KRUSE	7,476	0	0	7,476

TY 2017 Other Assets Schedule

Name: JOHN STAUFFER CHARITABLE TRUST

EIN: 23-7434707

Software ID: 17005038

Software Version: 2017v2.2

Other Assets Schedule

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
MINERAL RIGHTS	2	2	2

TY 2017 Other Decreases Schedule

Name: JOHN STAUFFER CHARITABLE TRUST

EIN: 23-7434707

Software ID: 17005038

Software Version: 2017v2.2

Description	Amount
BOOK/TAX TIMING DIFFERENCE	5,510

TY 2017 Other Expenses Schedule

Name: JOHN STAUFFER CHARITABLE TRUST**EIN:** 23-7434707**Software ID:** 17005038**Software Version:** 2017v2.2**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ADR PASS THRU FEES	2,836	2,836		
Amortization	109,901	109,901		
FILING FEES	488	488		
LIABILITY INSURANCE	1,075	1,075		

TY 2017 Other Professional Fees Schedule

Name: JOHN STAUFFER CHARITABLE TRUST

EIN: 23-7434707

Software ID: 17005038

Software Version: 2017v2.2

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EVERETT HARRIS & CO	142,047	142,047	0	0

TY 2017 Taxes Schedule

Name: JOHN STAUFFER CHARITABLE TRUST**EIN:** 23-7434707**Software ID:** 17005038**Software Version:** 2017v2.2

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CA ATTORNEY GENERAL	150	75		75
FEDERAL ESTIMATED TAX PAYMENT	75,000			
FOREIGN TAXES WITHHELD	46,349	46,349		
FRANCHISE TAX BOARD	10	5		5