

Form **990-PF****Return of Private Foundation**

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

OMB No 1545-0052

2017

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

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

For calendar year 2017 or tax year beginning

, 2017, and ending

, 20

Name of foundation THE JAMES H. WURZ JR. AND EDWARD T. WURZ SR.

A Employer identification number

FOUNDATION

27-0951890

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

BONIE
Residence

B Telephone number (see instructions)

6301 SUTLIFF ROAD

(315) 736-8231

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

ORISKANY, NY 13424

C If exemption application is pending, check here. ☐

G Check all that apply

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☒ Name changeD 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 foundationE 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) ▶ \$ 5,295,241.

J Accounting method ☒ Cash ☐ Accrual
☐ Other (specify)F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here. ☐

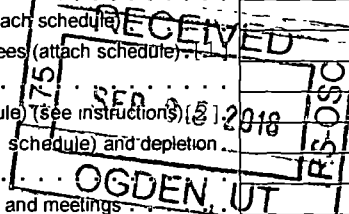
(Part I, column (d) must be on cash basis)

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)
1 Contributions, gifts, grants, etc., received (attach schedule)	865,000.			
2 Check ☐ if the foundation is not required to attach Sch B.				
3 Interest on savings and temporary cash investments	1,760.	1,760.		
4 Dividends and interest from securities	93,400.	93,400.		
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	59,653.			
b Gross sales price for all assets on line 6a	639,300.			
7 Capital gain net income (from Part IV, line 2)		59,653.		
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	1,019,813.	154,813.		
13 Compensation of officers, directors, trustees, etc.	0.			
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees (attach schedule)				
b Accounting fees (attach schedule)	19,089.	19,089.		
c Other professional fees (attach schedule)				
17 Interest				
18 Taxes (attach schedule) (See instructions)	1,511.			
19 Depreciation (attach schedule) and depletion				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses (attach schedule) ATTCH 3	10,250.			10,250.
24 Total operating and administrative expenses. Add lines 13 through 23.	30,850.	19,089.		10,250.
25 Contributions, gifts, grants paid	216,210.			216,210.
26 Total expenses and disbursements Add lines 24 and 25	247,060.	19,089.		226,460.
27 Subtract line 26 from line 12				
a Excess of revenue over expenses and disbursements	772,753.			
b Net investment income (if negative, enter -0-)		135,724.		
c Adjusted net income (if negative, enter -0-)				

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Operating and Administrative Expenses



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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
Assets	1	Cash - non-interest-bearing				
	2	Savings and temporary cash investments	1,033,969.	455,452.	455,452.	
	3	Accounts receivable ▶				
		Less allowance for doubtful accounts ▶	1,883.			
	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) [4]	46,098.	46,098.	44,664.	
	b	Investments - corporate stock (attach schedule) ATCH 5 . . .	1,408,966.	2,581,537.	3,146,831.	
	c	Investments - corporate bonds (attach schedule) ATCH 6 . . .	1,470,588.	1,647,562.	1,648,294.	
	Liabilities	11	Investments - land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach schedule) ▶				
12		Investments - mortgage loans				
13		Investments - other (attach schedule)				
14		Land, buildings, and equipment basis ▶				
		Less accumulated depreciation (attach schedule) ▶				
15		Other assets (describe ▶)				
16		Total assets (to be completed by all filers - see the instructions Also, see page 1, item I)	3,961,504.	4,730,649.	5,295,241.	
17		Accounts payable and accrued expenses				
18		Grants payable				
Net Assets or Fund Balances	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons .				
	21	Mortgages and other notes payable (attach schedule)				
	22	Other liabilities (describe ▶)				
23	Total liabilities (add lines 17 through 22)	0.	0.			
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here . . . ▶ ☐				
		and complete lines 24 through 26, and lines 30 and 31.				
	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 .	3,961,504.	4,730,649.		
30	Total net assets or fund balances (see instructions)	3,961,504.	4,730,649.			
31	Total liabilities and net assets/fund balances (see instructions)	3,961,504.	4,730,649.			

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	3,961,504.
2	Enter amount from Part I, line 27a	2	772,753.
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	4,734,257.
5	Decreases not included in line 2 (itemize) ▶ ATCH 7	5	3,608.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	4,730,649.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)
1 a SEE PART IV SCHEDULE				
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				
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				
(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	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))	
a				
b				
c				
d				
e				
2 Capital gain net income or (net capital loss) $\left\{ \begin{array}{l} \text{If gain, also enter in Part I, line 7} \\ \text{If (loss), enter -0- in Part I, line 7} \end{array} \right\}$		2	59,653.	
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	0.	

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

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

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

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

☐ Yes ☒ No

If "Yes," the foundation doesn't qualify under section 4940(e) Do not complete this part

(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	211,028.	3,164,839.	0.066679
2015	240,702.	2,431,665.	0.098986
2014	180,695.	1,722,052.	0.104930
2013	160,764.	861,217.	0.186671
2012	134,037.	813,349.	0.164796
2 Total of line 1, column (d)			2 0.622062
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5 0, or by the number of years the foundation has been in existence if less than 5 years			3 0.124412
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5			4 4,378,534.
5 Multiply line 4 by line 3.			5 544,742.
6 Enter 1% of net investment income (1% of Part I, line 27b).			6 1,357.
7 Add lines 5 and 6.			7 546,099.
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions			8 226,460.

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)		1	2,714.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ 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	2,714.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	2,714.
6 Credits/Payments			
a 2017 estimated tax payments and 2016 overpayment credited to 2017	6a 1,200.		
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c 1,514.		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	2,714.	
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		
11 Enter the amount of line 10 to be Credited to 2018 estimated tax ☐ Refunded ☐	11		

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ☐ \$ _____ (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? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	X	
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered. See instructions ☐ NY, ☐ _____		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2017 or the tax year beginning in 2017? See the instructions for Part XIV. If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule See instructions		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement See instructions		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	X	
14 The books are in care of ► JAMES J. WURZ Telephone no ► 315-736-8231 Located at ► 6301 SUTLIFF ROAD ORISKANY, NY ZIP+4 ► 13424		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year		15
16 At any time during calendar year 2017, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114 If "Yes," enter the name of the foreign country ►		X

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

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

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

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

5a	During the year, did the foundation pay or incur any amount to		Yes	No
(1)	Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes	☒ No	
(2)	Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	☐ Yes	☒ No	
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	☒ Yes	☐ No	
(4)	Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	☐ Yes	☒ No	
(5)	Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes	☒ No	
b	If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions. Organizations relying on a current notice regarding disaster assistance, check here		5b	X
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? If "Yes," attach the statement required by Regulations section 53.4945-5(d)	☐ Yes ☐ No		
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes ☒ No		
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870		6b	X
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes ☒ No		
b	If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?		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	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ATCH 8		0.	0.	0.

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

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

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

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

[illegible]

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

1	N/A	
2		
3		
4		

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

1	NONE	
2		
All other program-related investments See instructions		
3	NONE	
Total. Add lines 1 through 3		

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	4,076,319.
b	Average of monthly cash balances	1b	368,893.
c	Fair market value of all other assets (see instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	4,445,212.
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	4,445,212.
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see instructions)	4	66,678.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	4,378,534.
6	Minimum investment return. Enter 5% of line 5	6	218,927.

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	218,927.
2a	Tax on investment income for 2017 from Part VI, line 5	2a	2,714.
b	Income tax for 2017 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	2,714.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	216,213.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	216,213.
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	216,213.

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	226,460.
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	226,460.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	226,460.

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.

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Page **9****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				216,213.
2 Undistributed income, if any, as of the end of 2017				
a Enter amount for 2016 only.				
b Total for prior years 20 <u>15</u> , 20 <u>14</u> , 20 <u>13</u>				
3 Excess distributions carryover, if any, to 2017				
a From 2012	93,776.			
b From 2013	118,583.			
c From 2014	95,695.			
d From 2015	119,914.			
e From 2016	53,902.			
f Total of lines 3a through e	481,870.			
4 Qualifying distributions for 2017 from Part XII, line 4 ▶ \$ <u>226,460.</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.				216,213.
e Remaining amount distributed out of corpus.	10,247.			
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	492,117.			
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.				
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)	93,776.			
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a	398,341.			
10 Analysis of line 9				
a Excess from 2013	118,583.			
b Excess from 2014	95,695.			
c Excess from 2015	119,914.			
d Excess from 2016	53,902.			
e Excess from 2017	10,247.			

Form **990-PF** (2017)

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

NOT APPLICABLE

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2017, enter the date of the ruling

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

	Tax year	Prior 3 years			(e) Total
	(a) 2017	(b) 2016	(c) 2015	(d) 2014	
2 a 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 foundation had \$5,000 or more in assets at any time during the year - see instructions.)**1 Information Regarding Foundation Managers:**

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

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

N/A

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

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

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

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

c Any submission deadlines

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors

Part XV **Supplementary Information** (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

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 ATCH 9				
Total			3a	216,210.
b Approved for future payment				
Total			3b	

Enter gross amounts unless otherwise indicated

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

Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)

Schedule B

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

Schedule of Contributors

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

OMB No 1545-0047

2017

Name of the organization

THE JAMES H. WURZ JR. AND EDWARD T. WURZ SR.
FOUNDATION

Employer identification number

27-0951890

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)() (enter number) organization☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation☐ 501(c)(3) taxable private foundationCheck if your organization is covered by the **General Rule** or a **Special Rule**.

Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

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

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3 % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000, or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. ▶ \$ _____

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

Name of organization **THE JAMES H. WURZ JR. AND EDWARD T. WURZ SR. FOUNDATION**

Employer identification number
27-0951890

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	BONIDE PRODUCTS INC. C/O FINANCE DEPT., 6301 SUTLIFF RD ORISKANY, NY 13424	\$ 865,000.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Name of organization THE JAMES H. WURZ JR. AND EDWARD T. WURZ SR.
FOUNDATION

Employer identification number
27-0951890

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

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
	_____ _____ _____ _____	\$ _____	_____
	_____ _____ _____ _____	\$ _____	_____
	_____ _____ _____ _____	\$ _____	_____
	_____ _____ _____ _____	\$ _____	_____
	_____ _____ _____ _____	\$ _____	_____
	_____ _____ _____ _____	\$ _____	_____
	_____ _____ _____ _____	\$ _____	_____

Name of organization THE JAMES H. WURZ JR. AND EDWARD T. WURZ SR.
FOUNDATION

Employer identification number
27-0951890

Part III **Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor.** Complete columns (a) through (e) and the following line entry For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of \$1,000 or less for the year (Enter this information once See instructions) ► \$ _____
Use duplicate copies of Part III if additional space is needed.

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

ATTACHMENT 1FORM 990PF, PART I - OTHER PROFESSIONAL FEES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>
INVESTMENT MANAGEMENT SERVICES	19,089.	19,089.
TOTALS	<u>19,089.</u>	<u>19,089.</u>

ATTACHMENT 2FORM 990PF, PART I - TAXES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>
990-PF ESTIMATED TAX FOR 2017	1,200.
990-PF EXTENSION FOR 2016	311.
TOTALS	<u>1,511.</u>

ATTACHMENT 3

FORM 990PF, PART I - OTHER EXPENSES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	CHARITABLE PURPOSES
ADMINISTRATIVE FEES	10,000.	10,000.
STATE OR LOCAL FILING FEES	250.	250.
TOTALS	<u>10,250.</u>	<u>10,250.</u>

FORM 990PF, PART II - U.S. AND STATE OBLIGATIONS

<u>ATTACHMENT 4</u>	
<u>DESCRIPTION</u>	ENDING BOOK VALUE
FEDERAL HOME LOAN BANKS - 1.87	10,331.
FFCB - 2.460% - 11/02/2018	10,797.
FEDERAL HOME LOAN BANKS - 1.25	24,970.
US OBLIGATIONS TOTAL	46,098.
	ENDING FMV
	9,956.
	10,062.
	24,646.
	44,664.

FORM 990PF, PART II - CORPORATE STOCKATTACHMENT 5

<u>DESCRIPTION</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
AMAZON COM	5,748.	17,542.
ALPHABET INC CL A	29,346.	36,869.
FEDEX CORPORATION	6,988.	9,982.
NETFLIX INC	3,587.	10,174.
ARISTA NETWORKS	12,834.	12,957.
GOLDMAN SACHS GROUP	13,555.	15,031.
ABIOMED	7,298.	13,119.
PALO ALTO NETWORKS INC	9,609.	10,436.
DOMINOS PIZZA INC	14,853.	14,550.
CHARLES RIV LABORATORIES INTL	5,960.	8,756.
CELGENE CORP	8,589.	8,453.
COGNIZANT TECHNOLOGY SOLUTIONS	5,313.	6,037.
BROADCOM LIMITED	18,480.	24,149.
UNITED RENTALS INC	13,781.	17,879.
GILEAD SCIENCES INC	10,154.	7,522.
FACEBOOK INC	18,199.	19,940.
WALT DISNEY HOLDINGS CO	12,278.	12,256.
CENTENE CORP	9,232.	14,123.
AIR PRODS & CHEM INC	17,428.	23,792.
HOME DEPOT INC	17,145.	28,430.
MONSANTO CO	17,802.	17,517.
BOEING CO	20,217.	46,596.
MICROSOFT CORP	8,275.	13,686.
THE HERSHEY COMPANY	14,685.	18,162.
UNITEDHEALTH GROUP INC	16,491.	36,376.
AMERIPRISE FINANCIAL INC	20,139.	27,963.
JOHNSON & JOHNSON	16,931.	23,752.
VISA INC	11,328.	19,383.
ILLINOIS TOOL WORKS	15,099.	29,199.

FORM 990PF, PART II - CORPORATE STOCKATTACHMENT 5 (CONT'D)

<u>DESCRIPTION</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
BECTON DICKINSON & CO	23,608.	38,531.
STRYKER CORPORATION	16,213.	29,420.
NIKE INC-CL B	9,991.	12,510.
UNITED PARCEL SERVICE	20,596.	23,830.
EOG RESOURCES INC	17,387.	21,582.
ROYAL CARIBBEAN CRUISE	14,821.	24,452.
T. ROWE PRICE ASSOCIATES	15,426.	21,511.
PNC FINANCIAL GROUP INC	17,364.	30,301.
MASIMO CORPORATION	19,087.	18,486.
CHEVRON CORP	24,364.	27,542.
ACCENTURE PLC	19,670.	33,680.
TRIPADVISOR LLC	9,555.	7,926.
AKAMAI TECH COM STK	13,241.	15,024.
QUEST DIAGNOSTICS	21,954.	23,145.
COLGATE-PALMOLIVE COMPANY	17,392.	19,617.
SELECT SECTOR SPDR-HEALTH CARE	19,313.	22,158.
APPLE INC	33,147.	49,584.
ESTEE LAUDER COMPANIES INC	27,350.	37,536.
JP MORGAN CHASE	17,997.	32,082.
ACTIVISION BLIZZARD INC	17,986.	19,313.
COLFAX CORPORATION	8,787.	12,084.
AUTOMATIC DATA PROCESSING INC	24,234.	36,915.
WAL-MART STORES INC	29,247.	32,588.
ABBVIE INC	21,299.	34,332.
MARRIOTT INTERNATIONAL INC. CL	24,580.	48,863.
CHURCH & DWIGHT	14,742.	19,065.
AXON ENTERPRISE INC COM	6,646.	11,289.
STARBUCKS CORP COM	23,967.	27,854.
DOWDUPONT INC	29,640.	35,610.

ATTACHMENT 5 (CONT'D)FORM 990PF, PART II - CORPORATE STOCK

<u>DESCRIPTION</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
ISHARES TRUST RUSSELL 1000 GRO	50,426.	68,013.
VERIZON COMMUNICATIONS	25,373.	27,735.
COMCAST CORP	15,806.	22,428.
SPDR S&P MIDCAP 400 EFT TRUST	216,831.	215,880.
METLIFE INC	28,864.	33,622.
ABBOTT LABS	29,691.	41,090.
INTEL CORP	25,336.	36,697.
POWERSHARES QQQ NASDAQ 100	96,340.	126,944.
ISHARES RUSSELL 2000	130,403.	129,591.
CORNING INC	25,437.	27,671.
VANGUARD FTSE DEVELOPED MARKET	50,714.	61,458.
OPPENHEIMER SNR FLOATING RAT	11,833.	11,510.
FINANCIAL SELECT SECTOR SPDR F	49,426.	55,820.
SPDR S&P 500 ETF TRUST	610,431.	697,838.
ISHARES CORE MSCI EMERGING MAR	162,415.	173,261.
VANGUARD INFL-PROTECTED SECS	111,263.	105,812.
TOTALS	<u>2,581,537.</u>	<u>3,146,831.</u>

FORM 990PF, PART II - CORPORATE BONDSATTACHMENT 6

<u>DESCRIPTION</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
VERISK ANALYTICS - 4.125% - 09	15,576.	15,660.
APACHE CORP - 2.625% - 01/15/2	14,864.	14,710.
MATTEL - 3.150% - 03/15/2023	15,404.	12,915.
KROGER CO - 2.950% - 11/01/202	15,292.	15,145.
QUALCOMM - 2.250% - 05/20/2020	14,896.	14,884.
WALGREENS BOOTS ALLIANCE INC -	15,395.	15,095.
ARROW ELECTRS INC - 4.000% - 0	14,856.	15,306.
BROOKFIELD ASSET MGMT - 4.000%	14,874.	15,394.
AMPHENOL CORP - 2.550% - 01/30	15,192.	15,051.
CONSTELLATION BRANDS INC - 2.0	14,965.	14,903.
EBAY INC - 3.250% - 10/15/2020	20,422.	20,377.
HCP INC NOTE - 2.625% - 02/01/	20,352.	20,072.
CLOROX - 3.050% - 09/15/2022	20,465.	20,426.
DIGITAL RLTY TR - 3.625% - 10/	20,457.	20,611.
RAYTHEON - 3.125% - 10/15/2020	21,465.	20,460.
LG&E & KU ENERGY - 3.750% - 11	21,597.	20,634.
JPMORGAN CHASE & CO FR - 3.875	19,795.	20,862.
SCRIPPS NETWORKS INTERACT INC	20,276.	20,017.
WALGREENS BOOTS ALLIANCE - 3.8	19,671.	20,425.
L-3 COMMUNICATIONS SR GLBL NOT	19,589.	20,819.
AT&T INC - 2.800% - 02/17/2021	19,922.	20,089.
AMERICAN TOWER CORP - 3.450% -	20,389.	20,442.
BAXALTA INC - 3.600% - 06/23/2	20,320.	20,455.
DOW CHEM CO - 2.650% - 06/15/2	20,003.	20,455.
APPLE INC NOTE CALL - 3.350% -	20,260.	19,834.
AGILENT TECHNOLOGIES - 3.200%	20,535.	20,487.
KRAFT HEINZ FOODS - 3.000% - 0	19,426.	20,170.
KEYSIGHT TECH - 3.300% - 10/30	20,856.	19,246.
MOSAIC CO - 3.250% - 11/15/202	19,984.	20,189.
		19,825.

FORM 990PF, PART II - CORPORATE BONDSATTACHMENT 6 (CONT'D)

<u>DESCRIPTION</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
DISCOVERY COMMUNICATIONS - 4.3	26,951.	26,155.
VERIZON COMMUNICATIONS NOTE -	25,878.	25,744.
TUPPERWARE BRANDS CORP - 4.750	27,150.	26,207.
COMCAST CORP BOND - 2.850% - 0	25,599.	25,200.
KENNAMETAL INC - 2.650% - 11/0	25,358.	25,020.
YUM BRANDS - 3.750% - 11/01/20	27,202.	25,375.
MORGAN STANLEY FR - 4.875% - 1	26,815.	26,921.
TRANSOCEAN INC NOTE - 6.375% -	22,900.	27,000.
WYNDHAM WORLDWIDE BOND - 3.900	25,605.	24,737.
PRICELINE GRP NT - 3.650% - 03	25,244.	25,409.
MORGAN STANLEY - 2.200% - 12/0	25,091.	25,017.
UNITEDHEALTH GROUP INC NOTE -	25,124.	25,185.
CARDINAL HEALTH INC NOTE - 3.2	25,371.	25,026.
EXPRESS SCRIPTS HLDG NOTE - 3.	24,131.	25,221.
KIMBERLY CLARK CORP NOTE - 2.7	25,237.	24,679.
MCKESSON CORP NOTE - 2.700% -	24,397.	24,843.
QUEST DIAGNOSTICS INC NOTE - 2	24,742.	24,999.
SOUTHERN CO - 2.750% - 06/15/2	25,602.	25,158.
ROPER TECHNOLOGIES INC - 2.800	25,417.	25,044.
ABBOTT LABS - 2.350% - 11/22/2	25,056.	25,027.
INTERNATIONAL FLAVORS & FRAGRA	25,431.	25,121.
VENTAS REALTY LP - 2.000% - 02	30,307.	29,998.
INTL GAME TECHNOLOGY - 5.000%	31,293.	31,575.
EDGEWELL PERS CARE CO - 4.700%	31,014.	30,750.
NEWELL RUBBERMAID - 2.875% - 1	30,017.	30,241.
BANK OF AMERICA - 3.950% - 04/	29,481.	31,024.
UNDER ARMOUR INC - 3.250% - 06	28,360.	26,266.
BRANDYWINE OPER PARTNERSHIP -	29,971.	30,494.
GOLDMAN SACHS GROUP - 3.000% -	29,138.	29,431.

FORM 990PF, PART II - CORPORATE BONDSATTACHMENT 6 (CONT'D)

<u>DESCRIPTION</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
NATIONAL FUEL GAS CON - 3.750%	34,456.	35,461.
MONSANTO CO - 3.375% - 07/15/2	39,311.	40,600.
CELGENE CORP SR UNSEC - 3.875	40,658.	41,404.
BOSTON SCIENTIFIC CORP - 4.125	41,374.	41,872.
BECTON DICKINSON & CO - 3.250%	46,144.	45,645.
MYLAN INC NT - 2.550% - 03/28/	44,731.	45,000.
MARRIOTT INTL - 3.125% - 10/15	45,384.	45,546.
ANTHEM INC - 3.125% - 05/15/20	44,524.	45,396.
TOTALS	<u>1,647,562.</u>	<u>1,648,294.</u>

ATTACHMENT 7FORM 990PF, PART III - OTHER DECREASES IN NET WORTH OR FUND BALANCESDESCRIPTIONAMOUNT

PRIOR PERIOD OPTIONS ADJUSTMENT

3,608.

TOTAL

3,608.

FORM 990-PF - PART IV

CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
639,300.		PUBLICLY-TRADED SECURITIES					59,653.	
		579,647.						
TOTAL GAIN (LOSS)							<u>59,653.</u>	

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEESATTACHMENT 8

<u>NAME AND ADDRESS</u>	<u>TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION</u>	<u>COMPENSATION</u>	<u>CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS</u>	<u>EXPENSE ACCT AND OTHER ALLOWANCES</u>
DONALD STEVENSON 6301 SUTLIFF ROAD ORISKANY, NY 13424	DIR / TREAS 1.00	0.	0.	0.
GREGORY P WURZ 6301 SUTLIFF ROAD ORISKANY, NY 13424	DIR 1.00	0.	0.	0.
JAMES J WURZ 6301 SUTLIFF ROAD ORISKANY, NY 13424	PRES / DIR 1.00	0.	0.	0.
MICHAEL J WURZ 6301 SUTLIFF ROAD ORISKANY, NY 13424	DIR / SEC 1.00	0.	0.	0.
EDWARD T WURZ SR * 6301 SUTLIFF ROAD ORISKANY, NY 13424	DIR 1.00	0.	0.	0.
* REMOVED FROM FOUNDATION IN 2017				
GRAND TOTALS		0.	0.	0.

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 9

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND		PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
	FOUNDATION	STATUS OF RECIPIENT		
AIDS COMMUNITY RESOURCES 287 GENESEE ST, 2ND FL UTICA, NY 13501	N/A PC		GENERAL & UNRESTRICTED	500.
ALS OF UTICA 9169 RIVER RD MARCY, NY 13403	N/A PC		GENERAL & UNRESTRICTED	500
ALZHEIMERS RESOURCE CENTER INC 1314 WESTGATE PKWY STE 2 DOTHAN, AL 36303	N/A PC		GENERAL & UNRESTRICTED	500
AMERICAN FLORAL ENDOWMENT 1001 N FAIRFAX ST STE 201 ALEXANDRIA, VA 22314	N/A PC		GENERAL & UNRESTRICTED	500
AMERICAN FOUNDATION FOR SUICIDE PREVENTION 120 WALL ST 29TH FL NEW YORK, NY 10005	N/A PC		GENERAL & UNRESTRICTED	500
AMERICAN HEART ASSOCIATION 120 LOMOND COURT UTICA, NY 13502	N/A PC		GENERAL & UNRESTRICTED	500

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 9 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
AMERICAN HEART ASSOCIATION 120 LOMOND COURT UTICA, NY 13502	N/A PC	CHARITABLE EVENT	3,875
AMERICAN NATIONAL RED CROSS PO BOX 37839 BOONE, IA 50037	N/A PC	HURRICANE IRMA RELIEF EFFORTS	20,000
AMERICAN NATIONAL RED CROSS INTERNATIONAL RESPONSE P O BOX 37243 WASHINGTON, DC 20013	N/A PC	UTICA NY DIVISION	1,000
AMERICAN RED CROSS OF THE MOHAWK VALLEY CHAPTER 1415 GENESEE ST UTICA, NY 13501	N/A PC	GENERAL & UNRESTRICTED	3,000
AMERICAN YOUTH SOCCER ORGANIZATION - WHITESTOWN AY 4 WHITE ST WHITESBORO, NY 13492	N/A PC	GENERAL & UNRESTRICTED	5,000
BOY SCOUTS OF AMERICA 1401 GENESEE ST UTICA, NY 13501	N/A PC	GENERAL & UNRESTRICTED	750

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 9 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
BOYS & GIRLS CLUB OF UTICA INC 755 LANSING ST UTICA, NY 13501	N/A PC	GENERAL & UNRESTRICTED	500
A FORD CALIFORNIA STATE UNIVERSITY FRESNO 5150 N MAPLE AVE, M/S JA58 FRESNO, CA 93740	NONE I	SCHOLARSHIP GRANT	3,295
A FORD CALIFORNIA STATE UNIVERSITY FRESNO 5150 N MAPLE AVE, M/S JA58 FRESNO, CA 93740	NONE I	SCHOLARSHIP GRANT	2,337
CATHOLIC CHARITIES OF ONEIDA 1408 GENESEE ST UTICA, NY 13502	N/A PC	GENERAL & UNRESTRICTED	5,000
CENTER FOR FAMILY LIFE AND RECOVERY INC 502 COURT ST STE 401 UTICA, NY 13502	N/A PC	GENERAL & UNRESTRICTED	500
CENTRAL ASSOCIATION FOR THE BLIND INC 507 KENT ST UTICA, NY 13501	N/A PC	GENERAL & UNRESTRICTED	500

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 9 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
CENTRAL NEW YORK PARKINSONS SUPPORT GROUP INC 6 CHRISTOPHER CIR NEW HARTFORD, NY 13413	N/A PC	GENERAL & UNRESTRICTED	500
CENTRAL NEW YORK RONALD MCDONALD HOUSE CHARITIES I 1100 E GENESEE ST SYRACUSE, NY 13210	N/A PC	GENERAL & UNRESTRICTED	500
A JENKINS CLARKSON UNIVERSITY 8 CLARKSON AVE BOX 5564 POTSDAM, NY 13699	NONE I	SCHOLARSHIP GRANT	3,500
CLINTON SWIM CLUB PO BOX 62 NEW HARTFORD, NY 13413	N/A PC	GENERAL & UNRESTRICTED	250
COMFORT HOUSE INC 1203 REMBLE ST UTICA, NY 13501	N/A PC	GENERAL & UNRESTRICTED	5,000
COMPASSION COALITION 509 LAFAYETTE ST UTICA, NY 13502	N/A PC	GENERAL & UNRESTRICTED	500

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 9 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
DISABLED VETERANS NATIONAL FOUNDATION 1020 19TH ST NW, STE 475 WASHINGTON, DC 20036	N/A PC	GENERAL & UNRESTRICTED	500
EASTERN STAR DAY CARE CENTER INC PO BOX 627 ORISKANY, NY 13424	N/A PC	GENERAL & UNRESTRICTED	500
EASTERN STAR DAY CARE CENTER INC PO BOX 627 ORISKANY, NY 13424	N/A PC	EQUIPMENT FUND FOR DAYCARE CENTER	1,500
M SZALKOWSKI ELMIRA COLLEGE 1 PARK PL ELMIRA, NY 14901	NONE I	SCHOLARSHIP GRANT	3,500
FAXTON-ST LUKES HEALTHCARE 1656 CHAMPLIN AVE UTICA, NY 13502	N/A PC	GENERAL & UNRESTRICTED	5,000
FAXTON-ST LUKES HEALTHCARE 1656 CHAMPLIN AVE UTICA, NY 13502	N/A PC	STROKE PROGRAM	5,000

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 9 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
FEED OUR VETERANS 33 ROCKPORT RD NEW HARTFORD, NY 13413	N/A PC	GENERAL & UNRESTRICTED	500
FOLDS OF HONOR FOUNDATION 5800 N PATRIOT DR OWASSO, OK 74055	N/A PC	GENERAL & UNRESTRICTED	5,000
FOOD BANK OF CENTRAL NEW YORK 7066 INTERSTATE ISLAND RD SYRACUSE, NY 13209	N/A PC	GENERAL & UNRESTRICTED	500
FOR THE GOOD INC 1113 LINWOOD PL UTICA, NY 13501	N/A PC	GENERAL & UNRESTRICTED	500
FRIENDS OF THE ARC FOUNDATION INC 245 GENESEE ST UTICA, NY 13501	N/A PC	GENERAL & UNRESTRICTED	10,000
GRANTING GRACE FOR CHILDHOOD CANCER FOUNDATION INC 4260 COMMUNICATIONS DR NORCROSS, GA 30093	N/A PC	GENERAL & UNRESTRICTED	500

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 9 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
HEART SHARE HUMAN SERVICES OF NEW YORK 12 METRO TECH CENTER BROOKLYN, NY 11201	N/A PC	GENERAL & UNRESTRICTED	500
HOUSE OF THE GOOD SHEPHERD 100 LOMOND PL UTICA, NY 13502	N/A PC	GENERAL & UNRESTRICTED	10,000
HUMAN TECHNOLOGIES CORPORATION 2260 DWYER AVE UTICA, NY 13501	N/A PC	GENERAL & UNRESTRICTED	500
INSIGHT HOUSE CHEMICAL DEPENDENCY SERVICES INCORPO 500 WHITESBORO ST UTICA, NY 13502	N/A PC	GENERAL & UNRESTRICTED	1,000
JCTOD OUTREACH INC PO BOX 160 UTICA, NY 13503	N/A PC	GENERAL & UNRESTRICTED	500
LEUKEMIA & LYMPHOMA SOCIETY INC 3 INTERNATIONAL DR RYE BROOK, NY 10573	N/A PC	GENERAL & UNRESTRICTED	500

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 9 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
LITTLE LEAGUE BASEBALL INC 104 GREEN ST ORISKANY, NY 13424	N/A PC	GENERAL & UNRESTRICTED	100
LITTLE LEAGUE BASEBALL INC 4 TISDALE AVE NEW HARTFORD, NY 13413	N/A PC	GENERAL & UNRESTRICTED	250
L WENGERT MACMURRAY COLLEGE 447 E COLLEGE AVE JACKSONVILLE, IL 62650	NONE I	SCHOLARSHIP GRANT	3,500
NATIONAL KIDNEY FOUNDATION INC 731 JAMES ST SYRACUSE, NY 13203	N/A PC	GENERAL & UNRESTRICTED	500
NCMEC/NEW YORK - MOHAWK VALLEY 934 YORK ST UTICA, NY 13502	N/A PC	GENERAL & UNRESTRICTED	500
NEIGHBORHOOD CENTER INC 624 ELIZABETH ST UTICA, NY 13501	N/A PC	GENERAL & UNRESTRICTED	500

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 9 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
NEW HARTFORD HISTORICAL SOCIETY PO BOX 238 NEW HARTFORD, NY 13413	N/A PC	GENERAL & UNRESTRICTED	500
NEW HARTFORD PUBLIC LIBRARY 2 LIBRARY LN NEW HARTFORD, NY 13413	N/A PC	GENERAL & UNRESTRICTED	500
NEW HARTFORD WRESTLING CLUB 44 HOFFMAN RD NEW HARTFORD, NY 13413	N/A PC	GENERAL & UNRESTRICTED	250
NEW YORK MILLS VOLUNTEER FIRE COMPANY INC PO BOX 165 NEW YORK MLS, NY 13417	N/A PC	GENERAL & UNRESTRICTED	750
NEW YORK STATE RIGHT TO LIFE COMMITTEE EDUCATIONAL 41 STATE ST ALBANY, NY 12207	N/A PC	GENERAL & UNRESTRICTED	1,000
NOTRE DAME JR /SR HIGH SCHOOL 2 NOTRE DAME LN UTICA, NY 13502	N/A PC	GENERAL & UNRESTRICTED	2,500

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 9 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
OFFICER JOSEPH CORR FOUNDATION 28 SANGER AVE NEW HARTFORD, NY 13413	N/A PC	GENERAL & UNRESTRICTED	500
OPERATION SUNSHINE INC 221 ORISKANY PL UTICA, NY 13501	N/A PC	GENERAL & UNRESTRICTED	2,000
OUR LADY OF LOURDES CATHOLIC CHURCH 2 BARTON AVE UTICA, NY 13502	N/A PC	GENERAL & UNRESTRICTED	500
OUR LADY OF THE ROSARY 1736 BURRSTONE RD NEW HARTFORD, NY 13413	N/A PC	GENERAL & UNRESTRICTED	3,000
PLAYERS OF UTICA INC PO BOX 29 NEW HARTFORD, NY 13413	N/A PC	GENERAL & UNRESTRICTED	500
L FORBES PURCHASE COLLEGE SUNY 735 ANDERSON HILL RD PURCHASE, NY 10577	NONE I	SCHOLARSHIP GRANT	3,500.

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 9 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
L FORBES PURCHASE COLLEGE SUNY 735 ANDERSON HILL RD PURCHASE, NY 10577	NONE I	SCHOLARSHIP GRANT	3,500
RESCUE MISSION OF UTICA INC 212 RUTGER ST UTICA, NY 13501	N/A PC	GENERAL & UNRESTRICTED	2,000
RESOURCE CENTER FOR INDEPENDENT LIVING INC PO BOX 210 UTICA, NY 13503	N/A PC	GENERAL & UNRESTRICTED	2,000
RIISING STARS SOCCER CLUB OF CENTRAL NY INC PO BOX 423 ROME, NY 13442	N/A PC	GENERAL & UNRESTRICTED	7,000
ROMAN CATHOLIC DIOCESE OF SYRACUSE NEW YORK 240 E ONONDAGA ST SYRACUSE, NY 13202	N/A PC	GENERAL & UNRESTRICTED	3,000
A COCKETT SALEM STATE UNIVERSITY 352 LAFAYETTE ST SALEM, MA 01970	NONE I	SCHOLARSHIP GRANT	3,500

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 9 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
SAMARITANS PURSE PO BOX 3000 BOONE, NC 28607	N/A PC	HURRICANE HARVEY RELIEF FUND	30,000
SCHOOLS PLUS PO BOX 14714 SANTA ROSA, CA 95402	N/A PC	GENERAL & UNRESTRICTED	1,000
SEED AND WEED GARDEN CLUB ENVIRONS OF UTICA NEW YO 10 BRANTWOOD RD UTICA, NY 13501	N/A PC	GENERAL & UNRESTRICTED	250
SLOW FOOD USA INC 1 CRAWFORD LN NEW HARTFORD, NY 13413	N/A PC	GENERAL & UNRESTRICTED	500
SOCIETY FOR PRESERVATION & ENCRGMT OF BARBERSHOP PO BOX 445 NEW HARTFORD, NY 13413	N/A PC	GENERAL & UNRESTRICTED	250.
D WELLS ST BONAVENTURE UNIVERSITY 3261 W STATE RD ST BONAVENTURE, NY 14778	NONE I	SCHOLARSHIP GRANT	3,500

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 9 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
ST JUDE CHILDRENS RESEARCH HOSPITAL INC 501 ST JUDE'S PL MEMPHIS, TN 38105	N/A PC	GENERAL & UNRESTRICTED	500
ST PATRICK'S SCHOOL 354 ELIZABETH ST ONEIDA, NY 13421	N/A PC	GENERAL & UNRESTRICTED	1,000
ST PAULS CHURCH 16 PARK AVE WHITESBORO, NY 13492	N/A PC	GENERAL & UNRESTRICTED	1,000
STEVENS-SWAN-HUMANE-SOCIETY 5664 HORATIO ST UTICA, NY 13502	N/A PC	GENERAL & UNRESTRICTED	100
THE GREAT AMERICAN IRISH FESTIVAL INC P O BOX 584 MARCY, NY 13403	N/A PC	GENERAL & UNRESTRICTED	400
THE SALVATION ARMY 440 W NYACK RD W NYACK, NY 10994	N/A PC	GENERAL & UNRESTRICTED	2,000

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 9 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
THEA BOWMAN HOUSE INC 731 LAFAYETTE ST UTICA, NY 13502	N/A PC	GENERAL & UNRESTRICTED	500
THREE-G VOLUNTEER FIRE COMPANY INC PO BOX 112 GLENFIELD, NY 13343	N/A PC	APPARATUS FUND	3,000
TOURETTE ASSOCIATION OF AMERICA INC 21 SHIELDS ST MANSFIELD, MA 02048	N/A PC	GENERAL & UNRESTRICTED	500
TRUE VALUE FOUNDATION 8600 BRYN MAWR AVE CHICAGO, IL 60631	N/A PC	CHARITABLE EVENT	3,500
UNITED STATES FUND FOR UNICEF IN KIND ASSISTANCE C 125 MAIDEN LN 10TH FL NEW YORK, NY 10038	N/A SO I	GENERAL & UNRESTRICTED	500
C BARNES UNIVERSITY OF MEMPHIS 275 ADMINISTRATION BLDG MEMPHIS, TN 38152	NONE I	SCHOLARSHIP GRANT	3,500

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 9 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
C BARNES UNIVERSITY OF MEMPHIS 275 ADMINISTRATION BLDG MEMPHIS, TN 38152	NONE I	SCHOLARSHIP GRANT	3,500
M HARNIST UNIVERSITY OF NORTH TEXAS 1155 UNION CIR #311370 DENTON, TX 76203	NONE I	SCHOLARSHIP GRANT	3,500
M HARNIST UNIVERSITY OF NORTH TEXAS 1155 UNION CIR #311370 DENTON, TX 76203	NONE I	SCHOLARSHIP GRANT	3,500
S DERVESEVIC UTICA COLLEGE 1600 BURRSTONE RD UTICA, NY 13502	NONE I	SCHOLARSHIP GRANT	1,098.
S DERVESEVIC UTICA COLLEGE 1600 BURRSTONE RD UTICA, NY 13502	NONE I	SCHOLARSHIP GRANT	3,005
UTICA ZOOLOGICAL SOCIETY 99 STEELE HILL RD UTICA, NY 13501	N/A PC	GENERAL & UNRESTRICTED	250

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 9 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT		PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
VILLAGE OF ORISKANY 708 UTICA ST, P O BOX 904 ORISKANY, NY 13424	N/A GOV		FIRE DEPT DIVISION	500
Y W C A OF THE MOHAWK VALLEY 7 RUTGER PARK UTICA, NY 13501	N/A PC		GENERAL & UNRESTRICTED	500
YOUNG MENS CHRISTIAN ASSOC & WOMENS COMMUNITY CENT 301 W BLOOMFIELD ST ROME, NY 13440	N/A PC		GENERAL & UNRESTRICTED	1,500

TOTAL CONTRIBUTIONS PAID

216,210