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Form 990-PF

Department of the Treasury  
Internal Revenue ServiceReturn of Private Foundation  
or Section 4947(a)(1) Trust Treated as Private Foundation

OMB No 1545-0052

2017

Open to Public Inspection

- Do not enter social security numbers on this form as it may be made public.  
Go to [www.irs.gov/Form990PF](http://www.irs.gov/Form990PF) for instructions and the latest information.

For calendar year 2017 or tax year beginning

, and ending

Name of foundation <b>THE ARMSTRONG FAMILY FOUNDATION</b>			A Employer identification number <b>30-0212798</b>	
Number and street (or P O box number if mail is not delivered to street address) <b>1660 ALVIN LN</b>		Room/suite	B Telephone number (see instructions) <b>262-789-1874</b>	
City or town, state or province, country, and ZIP or foreign postal code <b>BROOKFIELD WI 53045</b>			C If exemption application is pending, check here <input type="checkbox"/>	
Foreign country name Foreign province/state/country Foreign postal code			D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
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			E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
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			F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) <b>\$ 3,212,306.</b>		J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (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)
<b>Revenue</b>				
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	71,849.	71,849.		
4 Dividends and interest from securities				
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	69,485.			
b Gross sales price for all assets on line 6a <b>87,162.</b>				
7 Capital gain net income (from Part IV, line 2)		69,485.		
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 <b>Total.</b> Add lines 1 through 11	141,334.	141,334.		
<b>Operating and Administrative Expenses</b>				
13 Compensation of officers, directors, trustees, etc.				
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees (attach schedule)				
b Accounting fees (attach schedule)	1,430.	1,430.		
c Other professional fees (attach schedule)				
17 Interest				
18 Taxes (attach schedule) (see instructions)	2,291.	2,002.		
19 Depreciation (attach schedule) and depletion				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses (attach schedule)	173.	75.		75.
24 <b>Total operating and administrative expenses.</b> Add lines 13 through 23	3,894.	3,507.		75.
25 Contributions, gifts, grants paid	138,900.			138,900.
26 <b>Total expenses and disbursements.</b> Add lines 24 and 25.	142,794.	3,507.		138,975.
27 Subtract line 26 from line 12:				
a Excess of revenue over expenses and disbursements	(1,460.)			
b Net investment income (if negative, enter -0-)		137,827.		
c Adjusted net income (if negative, enter -0-)				

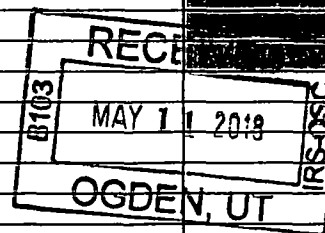
For Paperwork Reduction Act Notice, see instructions.

Form 990-PF (2017)

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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 . . . . .		84,730.	100,947.	100,947.
	2	Savings and temporary cash investments . . . . .				
	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) . . . . .	2,647,189.	2,629,512.	3,111,359.	
	c	Investments—corporate bonds (attach schedule) . . . . .				
	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		<b>Total assets</b> (to be completed by all filers—see the instructions. Also, see page 1, item I) . . . . .	2,731,919.	2,730,459.	3,212,306.	
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	<b>Total liabilities</b> (add lines 17 through 22) . . . . .				
		<b>Foundations that follow SFAS 117, check here</b> ▶ <input type="checkbox"/> and complete lines 24 through 26, and lines 30 and 31.				
	24	Unrestricted . . . . .				
	25	Temporarily restricted . . . . .				
	26	Permanently restricted . . . . .				
		<b>Foundations that do not follow SFAS 117, check here</b> ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.				
27	Capital stock, trust principal, or current funds . . . . .	2,731,919.	2,730,459.			
28	Paid-in or capital surplus, or land, bldg., and equipment fund					
29	Retained earnings, accumulated income, endowment, or other funds					
30	<b>Total net assets or fund balances</b> (see instructions) . . . . .	2,731,919.	2,730,459.			
31	<b>Total liabilities and net assets/fund balances</b> (see instructions) . . . . .	2,731,919.	2,730,459.			

## 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	2,731,919.
2	Enter amount from Part I, line 27a . . . . .	2	(1,460.)
3	Other increases not included in line 2 (itemize) ▶ . . . . .	3	
4	Add lines 1, 2, and 3 . . . . .	4	2,730,459.
5	Decreases not included in line 2 (itemize) ▶ . . . . .	5	
6	<b>Total net assets or fund balances at end of year</b> (line 4 minus line 5)—Part II, column (b), line 30 . . . . .	6	2,730,459.

**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.)
<b>1a</b> TEMPLETON GROWTH FUND		D	01/17/2006	12/18/2017
<b>b</b> L-T CAP GAIN DIST - AMERICAN CAP WORLD		D	12/28/2005	12/22/2017
<b>c</b> L-T CAP GAIN DIST - FRANKLIN MUT GLOBAL		D	01/06/2006	09/07/2017
<b>d</b> L-T CAP GAIN DIST - FRANKLIN MUT GLOBAL		D	01/06/2006	12/28/2017
<b>e</b> SEE ATTACHED WORKSHEET				

(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))
<b>a</b> 21,000.		17,677.	3,323.
<b>b</b> 24,298.			24,298.
<b>c</b> 4,141.			4,141.
<b>d</b> 4,970.			4,970.
<b>e</b> 32,753.			32,753.

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))
<b>a</b>			3,323.
<b>b</b>			24,298.
<b>c</b>			4,141.
<b>d</b>			4,970.
<b>e</b>			32,753.

<b>2</b> 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 }	<b>2</b>	69,485.
<b>3</b> 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	<b>3</b>	

**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	149,668.	2,798,501.	0.053481
2015	154,143.	3,044,997.	0.050622
2014	142,025.	3,180,729.	0.044652
2013	129,411.	2,910,884.	0.044458
2012	132,057.	2,579,054.	0.051204

<b>2</b> Total of line 1, column (d)	<b>2</b>	0.244417
<b>3</b> 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	<b>3</b>	0.048883
<b>4</b> Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	<b>4</b>	3,107,855.
<b>5</b> Multiply line 4 by line 3	<b>5</b>	151,921.
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)	<b>6</b>	1,378.
<b>7</b> Add lines 5 and 6	<b>7</b>	153,299.
<b>8</b> 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.	<b>8</b>	138,975.

**Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see instructions)**

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary—see instructions)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	1	2,757.	
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b).			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	2	0	
3	Add lines 1 and 2	3	2,757.	
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	4	0	
5	<b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-	5	2,757.	
6	<b>Credits/Payments.</b>			
a	2017 estimated tax payments and 2016 overpayment credited to 2017	6a	1,000.	
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	1,000.	
8	Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b>	9	1,757.	
10	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b>	10		
11	Enter the amount of line 10 to be. <b>Credited to 2018 estimated tax</b> <input type="checkbox"/> <b>Refunded</b> <input type="checkbox"/>	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 <b>Form 1120-POL</b> 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 <b>Form 990-T</b> for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by <i>General Instruction T</i>		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 NC		
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 <i>General Instruction G</i> ? 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)**

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 . . . . .	Yes	No
11			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
12			X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? . . . . .	X	
13	Website address ▶ N/A		
14	The books are in care of ▶ PETER ANDREW ARMSTRONG Telephone no. ▶ 262-789-1874		
14	Located at ▶ 1660 ALVIN LN BROOKFIELD WI ZIP+4 ▶ 53045-7807		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—check here . . . . .		<input type="checkbox"/>
15	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? . . . . .	Yes	No
16			X
See the instructions for exceptions and filing requirements for FinCEN Form 114. 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.		Yes	No
1a	During the year, did the foundation (either directly or indirectly).		
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions . . . . .		
b	Organizations relying on a current notice regarding disaster assistance, check here . . . . . ▶ <input type="checkbox"/>		
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2017? . . . . .		X
c			X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a	At the end of tax year 2017, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2017? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
a	If "Yes," list the years ▶ 20 ____ 20 ____ 20 ____ 20 ____		
b	Are there any years listed in 2a for which the foundation is <b>not</b> 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) . . . . .		
b			
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 ____		
c			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If "Yes," did it have excess business holdings in 2017 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2017.) . . . . .		
b			
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? . . . . .		X
4a			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
b			X

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

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

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

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

**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services. See instructions. If none, enter "NONE."

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

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

**Part IX-A** Summary of Direct Charitable Activities

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

Expenses

1 NOT APPLICABLE

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 NOT APPLICABLE

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.)

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	3,062,794.
<b>b</b>	Average of monthly cash balances	<b>1b</b>	92,389.
<b>c</b>	Fair market value of all other assets (see instructions)	<b>1c</b>	
<b>d</b>	<b>Total</b> (add lines 1a, b, and c)	<b>1d</b>	3,155,183.
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	3,155,183.
<b>4</b>	Cash deemed held for charitable activities. Enter 1½ % of line 3 (for greater amount, see instructions)	<b>4</b>	47,328.
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	3,107,855.
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	155,393.

**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.)

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	155,393.
<b>2a</b>	Tax on investment income for 2017 from Part VI, line 5	<b>2a</b>	2,757.
<b>b</b>	Income tax for 2017 (This does not include the tax from Part VI.)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	2,757.
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	152,636.
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	
<b>5</b>	Add lines 3 and 4	<b>5</b>	152,636.
<b>6</b>	Deduction from distributable amount (see instructions)	<b>6</b>	
<b>7</b>	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	152,636.

**Part XII Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b>	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26	<b>1a</b>	138,975.
<b>b</b>	Program-related investments—total from Part IX-B	<b>1b</b>	
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	138,975.
<b>5</b>	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	<b>5</b>	
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	138,975.

**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 . . . . .				152,636.
2 Undistributed income, if any, as of the end of 2017				
a Enter amount for 2016 only . . . . .			138,884.	
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: ► \$ 138,975.				
a Applied to 2016, but not more than line 2a . . . . .			138,884.	
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 . . . . .				91.
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 . . . . .				152,545.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required—see instructions) . . . . .				
8 Excess distributions carryover from 2012 not applied on line 5 or line 7 (see instructions) . . . . .				
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a . . . . .				
10 Analysis of line 9.				
a Excess from 2013 . . . . .				
b Excess from 2014 . . . . .				
c Excess from 2015 . . . . .				
d Excess from 2016 . . . . .				
e Excess from 2017 . . . . .				

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

- 1a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2017, enter the date of the ruling ▶
- b** Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

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

NONE

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

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

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

PETER A ARMSTRONG 262-789-1874 1660 ALVIN LN BROOKFIELD WI 53045

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

DESCRIPTION OF PROGRAM W/BUDGETS, FORM 990 W/AUDIT, AND BOARD LIST

- c Any submission deadlines:**

OCTOBER 1

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

NONE

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> Paid during the year SEE SCHEDULE				138,900.
<b>Total</b>			<b>3a</b>	138,900.
<b>b</b> Approved for future payment NONE				
<b>Total</b>			<b>3b</b>	



1	<p>Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?</p>	
a	<p>Transfers from the reporting foundation to a noncharitable exempt organization of:</p>	
	<p>(1) Cash . . . . .</p>	1a
	<p>(2) Other assets . . . . .</p>	1a
b	<p>Other transactions.</p>	
	<p>(1) Sales of assets to a noncharitable exempt organization . . . . .</p>	1b
	<p>(2) Purchases of assets from a noncharitable exempt organization . . . . .</p>	1b
	<p>(3) Rental of facilities, equipment, or other assets . . . . .</p>	1b
	<p>(4) Reimbursement arrangements . . . . .</p>	1b
	<p>(5) Loans or loan guarantees . . . . .</p>	1b
	<p>(6) Performance of services or membership or fundraising solicitations . . . . .</p>	1b
c	<p>Sharing of facilities, equipment, mailing lists, other assets, or paid employees . . . . .</p>	1
d	<p>If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.</p>	

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

[illegible]

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

**b** If "Yes," complete the following schedule.

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

**Sign  
Here**

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

Signature of officer or trustee

Date \_\_\_\_\_

► PRESIDENT

**Title**

May the IRS discuss this return with the preparer shown below?

See instructions ☒ Yes ☐ No

**Paid  
Preparer  
Use Only**

Print/Type preparer's name

Preparer's signature

Date \_\_\_\_\_

Check ☒ if self-employed

PTIN

P00296033

Firm's name ▶ JACK M HARRIS, CPA

Firm's EIN ▶ 56-1714483

Firm's address ▶ 131 W PARRIS AVE

Phone no	336-887-7524
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HIGH POINT NC 27262

# List of Officers, Directors, Trustees, and Key Employees

**US 990-PF**

**990PF: Page 6, Part VIII**

**2017**

A Name and address (For address, enter Street, Zip code State, and City in that order)	B Title and avg hours per week devoted to position	C Compensation	D Contributions to employee benefit plans and deferred compensation	E Expense account & other allowances
THOMAS L ARMSTRONG 7305 AUTUMN LAKE DRIVE SUMMERFIELD NC 27358	PRESIDENT 1	0		
PETER A ARMSTRONG 1660 ALVIN LN BROOKFIELD WI 53045	VP/TREAS 1	0		
MARK R ARMSTRONG 1607 SPOTTSWOOD PLACE LYNCHBURG VA 24503	VP	0		
ERIC R ARMSTRONG 12419 CLEARFALLS DR BOCA RATON FL 33428	VP	0		
PETER A ARMSTRONG II 1607 SPOTTSWOOD PLACE LYNCHBURG VA 24503	VP	0		
MARGARET RYAN ARMSTRONG 1433 TROTTER RIDGE LN 3-B WESTLAKE OH 44145	VP	0		
MARK R ARMSTRONG JR 1607 SPOTTSWOOD PLACE LYNCHBURG VA 24503	VP	0		
MICHAEL ARMSTRONG 7305 AUTUMN LAKE DRIVE SUMMERFIELD NC 27358	VP	0		
WILLIAM ARMSTRONG 7305 AUTUMN LAKE DRIVE SUMMERFIELD NC 27358	VP	0		

THE ARMSTRONG FAMILY FOUNDATION  
2017 FORM 990-PF  
PART XV SUPPLEMENTARY INFORMATION  
3a GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

Recipient Name and address	If an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Holocaust Foundation of Ctl Va 1208 Nichols Tavern Drive Lynchburg, VA 24503	N/A	PC	Historical/educational preservation	2,000
First Presbyterian Church 617 N Elm Street Greensboro, NC 27401	N/A	PC	Church Operating Fund	1,000
The Wooster Fund Office of Alumni Relations Gault Alumni Center Wooster, Ohio 44691	N/A	PC	College endowment	500
Grand Blanc High School 12500 Holly Road Grand Blanc, MI 48439	N/A	PC	School endowment	500
Va Tech Foundation 902 Prices Fork Road Blacksburg, VA 24061	N/A	PC	College endowment	5,000
Glades Presbyterian Church 21121 Oriole Country Road Boca Raton, FL 33428	N/A	PC	Church operating fund	8,000
Cystic Fibrosis Found of S Fla 3443 NW 55th St , Building 7 Fort Lauderdale, FL 33496	N/A	PC	Medical research	2,000
Victims of Communism Memorial Found 300 New Jersey Ave , NW Suite 900 Washington, DC 20001	N/A	PC	Victim assistance	1,000
Boys' & Girls' Club of Greater HP P O Box 2834 High Point, NC 27261	N/A	PC	Indigent children endowment	6,400
Woodberry Forest School 898 Woodberry Forest Road Woodberry Forest, VA 22989	N/A	PC	School endowment	1,500
Institute of World Politics 1521 16th Street, NW Washington, DC 20036	N/A	PC	Educational endowment	1,000
Princeton University Prep Program 36 University Place, Suite 350 Princeton, NJ 08544	N/A	PC	College endowment	2,000
United Way 1500 Yanceyville Street Greensboro, NC 27405	N/A	PC	Assist various non profit agencies	1,000
EC Glass Foundation PO Box 267 Lynchburg, VA 24505	N/A	PC	Academic Support	1,000
Hawken School PO Box 8002 Gates Mill, OH 44090	N/A	PC	Educational Assistance	2,000

THE ARMSTRONG FAMILY FOUNDATION  
2017 FORM 990-PF  
PART XV SUPPLEMENTARY INFORMATION  
3a GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR (Continued)

Recipient Name and address	If an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
GALA 13442 Lorain Avenue Cleveland, OH 44111	N/A	PC	Educational assistance	2,000
Tourette Syndrome Assn. 42-40 Bell Blvd Bayside, NY 11361	N/A	PC	Medical research	500
Kenyon College College Relations Gambier, OH 43022	N/A	PC	College endowment	2,300
Jesuit Retreat House 4800 Fahmwald Road Oshkosh, WI 54902	N/A	PC	Spiritual enrichment	10,000
Make A Wish 1131 Harding Place Charlotte, NC 28204	N/A	PC	Charitable Foundation	1,000
Southern Methodist University PO Box 223927 Dallas, TX 75222	N/A	PC	Educational Assistance	2,500
St Andrews School 3900 Jog Road Boca Raton, FL 33434	N/A	PC	Education endowment	10,000
Girl Scouts USA PO Box 5046 New York, NY 10087-5046	N/A	PC	Promote leadership/character	500
Elon University 2185 Campus Box Elon, NC 27244	N/A	PC	Service learning	2,500
Davidson College Annual Fund PO Box 7170 Davidson, NC 28035-7170	N/A	PC	College endowment	2,000
Arts & Science Development PO Box 400801 Charlottesville, VA 22904-4801	N/A	PC	College endowment	5,000
Campus Crusade for Christ PO Box 628222 Orlando, FL 32862	N/A	PC	Build faith in Christ	3,000
Elmbrook Humane Society 20950 Enterprise Avenue Brookfield WI 53045	N/A	PC	Provides shelter for animals	1,000
Central Michigan Development Office Carlin Alumni House CMU 524 E Bellows Street Mount Pleasant, MI 48859	N/A	PC	Athletic endowment	5,250
Guilford College 5800 West Friendly Avenue Greensboro, NC 27410	N/A	PC	Education endowment	5,000



THE ARMSTRONG FAMILY FOUNDATION  
2017 FORM 990-PF  
PART XV SUPPLEMENTARY INFORMATION  
3a GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR (Continued)

Recipient Name and address	If an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
UNC-G Advancement Services PO Box 26170 Greensboro, NC 27402	N/A	PC	Education	4,500
Papyrology Enrichment Fund 913 S University Avenue Ann Arbor, MI 48109	N/A	PC	Conservation, outreach, and support for scholars	700
Duke University-Cancer Box 90581 Durham, NC 27708-0581	N/A	PC	Medical research	36,000
Place of Hope 21441 Boca Rio Road Boca Raton, FL 33433	N/A	PC	Foster care and support services	1,000
Central Michigan University 524 E Bellows Street Mount Pleasant, MI 48858	N/A	PC	College endowment	500
Boca Raton Police Foundation 6800 Broken Sound Parkway, Ste 200 Boca Raton, FL 33487	N/A	PC	Support police department	2,000
Educational First Steps 2815 Gaston Avenue Dallas, TX 75226	N/A	PC	Education	750
Special Education Alliance 403 Iverleigh Lane Jacksonville, NC 28540	N/A	PC	Education	1,000
Bethany College Center for Institutional Advancement 31 E Campus Drive Bethany, WV 26032	N/A	PC	Education	1,500
Greensboro Day School 5401 Lawndale Drive Greensboro, NC 27455	N/A	PC	Education	500
Voices Together 5007 Southpark Drive, Suite 230 Durham, NC 27713	N/A	PC	Education	<u>3,000</u>
Total				<u><u>138,900</u></u>