

Form **990-PF**

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

OMB No. 1545-0052

2017

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.

Open to Public Inspection

For calendar year 2017 or tax year beginning , 2017, and ending , 20

Name of foundation SCHULER FAMILY FOUNDATION		A Employer identification number 33-0753301
Number and street (or P.O. box number if mail is not delivered to street address) 11315 LAKE RIM ROAD	Room/suite	B Telephone number (see instructions) 760-484-8844
City or town, state or province, country, and ZIP or foreign postal code SAN DIEGO, CA 92131		C If exemption application is pending, check here <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		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input checked="" type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 622,039	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>
(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)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)				
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	16,402	16,402		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	31			
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)			31	
	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	16,433	16,433			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	1,800	180		1,620
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	160	160		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	365	36		329
	24 Total operating and administrative expenses. Add lines 13 through 23	2,325	376		1,949
	25 Contributions, gifts, grants paid	28,500			28,500
26 Total expenses and disbursements. Add lines 24 and 25	30,825	376		30,449	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	(14,392)				
b Net investment income (if negative, enter -0-)			16,057		
c Adjusted net income (if negative, enter -0-)				N/A	

3/1
SCANNED MAY 15 2018

RECEIVED
APR 10 2018
OGDEN, UT

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions)			
		Beginning of year (a) Book Value	End of year (b) Book Value (c) Fair Market Value		
Assets	1	Cash—non-interest-bearing	9,622	10,264	10,264
	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)	285,182	272,648	611,775
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment: basis ▶			
	Less: accumulated depreciation (attach schedule) ▶				
12	Investments—mortgage loans				
13	Investments—other (attach schedule)				
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 l)	294,804	282,912	622,039	
Liabilities	17	Accounts payable and accrued expenses		1,200	
	18	Grants payable		1,500	
	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)		2,700	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26, and lines 30 and 31.				
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> 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	294,804	280,212	
30	Total net assets or fund balances (see instructions)	294,804	280,212		
31	Total liabilities and net assets/fund balances (see instructions)	294,804	282,912		

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)	1 294,804
2	Enter amount from Part I, line 27a	2 (14,392)
3	Other increases not included in line 2 (itemize) ▶	3
4	Add lines 1, 2, and 3	4 280,412
5	Decreases not included in line 2 (itemize) ▶ Outstanding check from 2014	5 (200)
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6 280,212

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse, or common stock, 200 shs. MLC Co.)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)
1a	20 shs IBM	D	09/01/16	12/07/17
b	372 shs NWBI	D	09/01/16	12/07/17
c	28 shs ZBH	D	09/01/16	12/07/17
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	3077	3177	(100)	
b	6248	5745	504	
c	3240	3612	(372)	
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.				(l) Gains (Col. (h) gain minus col. (k), but not less than -0- or Losses (from col. (h)))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any		
a				
b				
c				
d				
e				
2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }		2	31
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	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? Yes No
If "Yes," the foundation doesn't qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2016	23,518	461,541	.050955
2015	18,968	392,086	.048377
2014	20,680	404,999	.051062
2013	18,188	373,676	.048673
2012	16,933	312,293	.054221
2	Total of line 1, column (d)		2 .253288
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 .050658
4	Enter the net value of noncharitable-use assets for 2017 from Part X, line 5		4 590,796
5	Multiply line 4 by line 3		5 29,928
6	Enter 1% of net investment income (1% of Part I, line 27b)		6 161
7	Add lines 5 and 6		7 30,089
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 30,449

3

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 checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	161
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	161
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	4	
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	161
6	Credits/Payments:		
a	2017 estimated tax payments and 2016 overpayment credited to 2017	6a	
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	
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	161
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	
11	Enter the amount of line 10 to be: Credited to 2018 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a		✓
1b		✓
1c		✓
2		✓
3		✓
4a		✓
4b		
5		✓
6	✓	
7	✓	
8a		
8b	✓	
9		✓
10		✓

2

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		✓
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		✓
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ <u>N/A</u>	✓	
14	The books are in care of ▶ <u>BONNI COGAN</u> Telephone no. ▶ <u>760-484-8844</u> Located at ▶ <u>670 CLOUDY MOON, BORREGO SPGS, CA</u> ZIP+4 ▶ <u>92004-0307</u>		
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 ▶ <u>15</u>		<input type="checkbox"/>
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 ▶		✓

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 Organizations relying on a current notice regarding disaster assistance, check here ▶ <input type="checkbox"/>	1b	
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2017?	1c	✓
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)): a At the end of tax year 2017, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2017? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ 20____, 20____, 20____, 20____ b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions.) 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____	2b	
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.)	3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	✓
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2017?	4b	✓

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))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5)	Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions		5b	
	Organizations relying on a current notice regarding disaster assistance, check here	<input type="checkbox"/>		
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?	<input type="checkbox"/> Yes <input type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		6b	✓
	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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?		7b	

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

1 List all officers, directors, trustees, 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
ALAN L. SCHULER 11315 LAKE RIM RD., SAN DIEGO, CA 92131	CHAIRMAN/.01	300	0	0
BONNI S. COGAN PO BOX 307, BORREGO SPGS, CA 92004	TREASURER/1	300	0	0
DAWNA L. CHUSS 2657 PALACE DR., SAN DIEGO, CA 92123	SECRETARY/.02	300	0	0
SHERRI S. LIGHTNER 8551 LA JOLLA SHORES DR., LA JOLLA, CA 92037	DIRECTOR/.01	300	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"				
CONTINUATION OF PART VIII, 1. (ABOVE):				
JOHN W. LIGHTNER 8551 LA JOLLA SHORES DR., LA JOLLA, CA 92037	DIRECTOR/.01	300	0	0
EVLYN A. BAEZ 6623 SOUTH MASON AVE., TACOMA, WA 98409	DIRECTOR/.01	300	0	0
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.

1	N/A	Expenses
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

1	N/A	Amount
2		
3	All other program-related investments See instructions	
Total. Add lines 1 through 3		

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	584,850
b	Average of monthly cash balances	1b	14,943
c	Fair market value of all other assets (see instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	599,793
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	599,793
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	8,997
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	590,796
6	Minimum investment return. Enter 5% of line 5	6	29,540

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	29,540
2a	Tax on investment income for 2017 from Part VI, line 5	2a	161
b	Income tax for 2017. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	161
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	29,379
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	29,379
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	29,379

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	30,449
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	30,449
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	161
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	30,288

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				29,379
2 Undistributed income, if any, as of the end of 2017:				
a Enter amount for 2016 only			0	
b Total for prior years: 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2017:				
a From 2012	1,146			
b From 2013				
c From 2014	123			
d From 2015				
e From 2016	701			
f Total of lines 3a through e	1,970			
4 Qualifying distributions for 2017 from Part XII, line 4: ▶ \$ 30,449				
a Applied to 2016, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions)		0		
c Treated as distributions out of corpus (Election required—see instructions)	0			
d Applied to 2017 distributable amount				29,379
e Remaining amount distributed out of corpus	1,070			
5 Excess distributions carryover applied to 2017 (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	3,040			
b Prior years' undistributed income. Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0		
d Subtract line 6c from line 6b. Taxable amount—see instructions		0		
e Undistributed income for 2016. Subtract line 4a from line 2a. Taxable amount—see instructions			0	
f Undistributed income for 2017. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2018				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required—see instructions)	0			
8 Excess distributions carryover from 2012 not applied on line 5 or line 7 (see instructions)	1,146			
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a	1,894			
10 Analysis of line 9:				
a Excess from 2013				
b Excess from 2014	123			
c Excess from 2015				
d Excess from 2016	701			
e Excess from 2017	1,070			

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

Part XV Supplementary Information (Complete this part only if the 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).)

ALAN L. SCHULER

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

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

Check here if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc., 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 Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<p>a <i>Paid during the year</i></p> <p>SEE ATTACHED SCHEDULE</p>				28,500
<p>Total ▶ 3a</p>				28,500
<p>b <i>Approved for future payment</i></p>				
<p>Total ▶ 3b</p>				

Schuler Family Foundation

EIN: 33-0753301

2017

Form 990-PF, Part I, Line 18

Taxes	
CA Form 199	\$ 10
CA Secretary of State	\$ 20
IRS Form 990-PF	<u>\$ 130</u>
Total	<u>\$ 160</u>

Form 990-PF, Part I, Line 23

Other Expenses	
BUD ADR Pass Thru Fee	\$ 59
BUD Foreign Tax Paid	<u>\$ 306</u>
Total	<u>\$ 365</u>

Form 990-PF, Part II, Line 10b

		BOY		End of Year	
Investments - corporate stock		Book Value	Book Value	FMV	
ABBV	20 shs	\$ 841	\$ 841	\$	1,934
ABT	20 shs	\$ 1,277	\$ 1,277	\$	1,141
ASIX	17 shs	\$ 229	\$ 229	\$	715
BUD	250 shs	\$ 27,976	\$ 27,976	\$	27,890
CVX	240 shs	\$ 24,006	\$ 24,006	\$	30,046
HON	430 shs	\$ 45,403	\$ 45,403	\$	65,945
IBM	20 shs	\$ 3,177	\$ -	\$	-
JNJ	1,920 shs	\$ 68,722	\$ 68,722	\$	268,262
KO	220 shs	\$ 9,527	\$ 9,527	\$	10,094
LLY	380 shs	\$ 29,412	\$ 29,412	\$	32,095
NWBI	372 shs	\$ 5,745	\$ -	\$	-
PG	1,890 shs	\$ 65,254	\$ 65,254	\$	173,653
ZBH	28 shs	\$ 3,613	\$ -	\$	-
Total		<u>\$ 285,182</u>	<u>\$ 272,647</u>	<u>\$</u>	<u>611,775</u>

Form 990-PF, Part X, Line 1a

Average Monthly FMV of Securities		Beg. Of Mo	End of Mo.	Average
End of Month FMV for	Jan	\$ 536,922	\$ 540,735	\$ 538,829
	Feb	\$ 540,735	\$ 571,597	\$ 556,166
	Mar	\$ 571,597	\$ 572,976	\$ 572,287
	Apr	\$ 572,976	\$ 568,315	\$ 570,646
	May	\$ 568,315	\$ 579,067	\$ 573,691
	June	\$ 579,067	\$ 585,227	\$ 582,147
	July	\$ 585,227	\$ 598,101	\$ 591,664
	Aug	\$ 598,101	\$ 599,197	\$ 598,649
	Sep	\$ 599,197	\$ 599,077	\$ 599,137
	Oct	\$ 599,077	\$ 609,038	\$ 604,058
	Nov	\$ 609,038	\$ 620,524	\$ 614,781
	Dec	\$ 620,524	\$ 611,775	\$ 616,150
Total				<u>\$ 7,018,203</u>
Divided by 12 = Avg				<u>\$ 584,850</u>

Schuler Family Foundation

EIN: 33-0753301

2017

Form 990-PF, Part X, Line 1b

Average of Monthly Cash Balances

	<u>Beg</u>	<u>Of Mo.</u>	<u>End of Mo</u>	<u>Average</u>
Jan	\$	10,162	\$ 9,529	\$ 9,845
Feb	\$	9,529	\$ 10,772	\$ 10,150
Mar	\$	10,772	\$ 13,058	\$ 11,915
Apr	\$	13,058	\$ 12,147	\$ 12,603
May	\$	12,147	\$ 13,502	\$ 12,825
June	\$	13,502	\$ 15,889	\$ 14,696
July	\$	15,889	\$ 15,981	\$ 15,935
Aug	\$	15,981	\$ 17,367	\$ 16,674
Sep	\$	17,367	\$ 19,759	\$ 18,563
Oct	\$	19,759	\$ 19,853	\$ 19,806
Nov	\$	19,853	\$ 21,242	\$ 20,548
Dec	\$	21,242	\$ 10,264	\$ 15,753
Total				<u>\$ 179,313</u>
Divided by 12 = Avg				<u>\$ 14,943</u>

Schuler Family Foundation
EIN: 33-0753301
2017

Form 990- PF, Part XV, 3 a

Grants and Contributions Paid During the Year:

Recipient	EIN	Relationship	Fdn Status	Purpose	Amount
American Legion Auxiliary Unit 853 PO Box 116, Borrego Springs, CA 92004	33-0865328	None	EOF	Need	\$ 240
American Legion Borrego Springs Post 853 PO Box 2653, Borrego Springs, CA 92004	33-0767897	None	PC	Need	\$ 3,000
Anza Borrego Desert Natural History Association PO Box 310, Borrego Springs, CA 92004	23-7107105	None	PC	Need	\$ 200
Anza-Borrego Foundation PO Box 2001, Borrego Springs, CA 92004	33-0334338	None	EOF	Need	\$ 200
Barnes Cemetery Association 2461 Route 666, Sheffield, PA 16347	25-1122988	None	EOF	Need	\$ 1,700
Borrego Festivals Foundation PO Box 756, Borrego Springs, CA 92004	46-1232990	None	EOF	Need	\$ 12,500
Borrego Springs Civic Foundation PO Box 1164, Borrego Springs, CA 92004	51-0171857	None	EOF	Need	\$ 240
Borrego Springs Youth & Senior Center PO Box 1362, Borrego Springs, CA 92004	23-7155196	None	PC	Need	\$ 1,500
Boys & Girls Club PO Box 671, Borrego Springs, CA 92004	95-1865988	None	PC	Need	\$ 1,500
Christmas Circle Community Park PO Box 1025, Borrego Springs, CA 92004	91-1774674	None	PC	Need	\$ 2,000
Mira Mesa/Scripps Ranch RSVP 8450-A Mira Mesa Blvd., San Diego, CA 92126	33-0638711	None	EOF	Need	\$ 1,500
Scripps Ranch Theatre 10755-F Scripps Poway Pkwy 187, San Diego, CA 92131	91-1997458	None	PC	Need	\$ 240
Sheffield Depot Preservation Society PO Box 671, Sheffield, PA 16347	33-1130592	None	PC	Need	\$ 500
Sheffield Volunteer Fire Department and Ambulance Service PO Box 551, Sheffield, PA 16347	51-0598884	None	PC	Need	\$ 240
Utility Consumers Action Network 3405 Kenyon St, Ste 401, San Diego, CA 92110	33-0002313	None	PC	Need	\$ 1,500
Warren County Historical Society 210 Fourth Ave., PO Box 427, Warren, PA 16365	25-6059123	None	PC	Need	\$ 240
Washington & Jefferson College 60 South Lincoln St., Washington, PA 15301	25-0965601	None	PC	Need	\$ 200
Zoological Society of San Diego dba San Diego Zoo Global PO Box 120551, San Diego, CA 92112	95-1648219	None	PC	Need	<u>\$ 1,000</u>
TOTAL					<u>\$ 28,500</u>