

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
D.J. ANGUS-SCIENTECH EDUCATIONAL FOUNDATION, INC.

Number and street (or P O box number if mail is not delivered to street address) Room/suite
1489 WINDPUMP WAY

City or town, state or province, country, and ZIP or foreign postal code
INDIANAPOLIS, IN 46280-2866

A Employer identification number
35-6065111

B Telephone number (see instructions)
317-730-5141

C If exemption application is pending, check here ☐

D 1. Foreign organizations, check here ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ☐

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity
☐ Final return ☐ Amended return
☐ Address change ☐ Name change

H Check type of organization: ☒ Section 501(c)(3) exempt private foundation **04**
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ **\$ 2,606,959**

J Accounting method: ☒ Cash ☐ Accrual
☐ 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)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)	28,191			
	2 Check ☒ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	275	275	275	
	4 Dividends and interest from securities	63,202	63,202	63,202	
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets no				
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 1)		-0-		
	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)	39,985	39,985	39,985		
12 Total. Add lines 1 through 11	131,653	103,462	103,462		
Operating and Administrative Expenses	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)	2,400	2,400	2,400	2,400
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	2,448	2,448	2,448	2,448
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	1,269	1,269	1,269	1,269
	24 Total operating and administrative expenses. Add lines 13 through 23	6,117	6,117	6,117	6,117
	25 Contributions, gifts, grants paid	142,782			142,782
26 Total expenses and disbursements. Add lines 24 and 25	148,899	6,117	6,117	148,899	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	<17,246>				
b Net investment income (if negative, enter -0-)		97,345			
c Adjusted net income (if negative, enter -0-)			97,345		

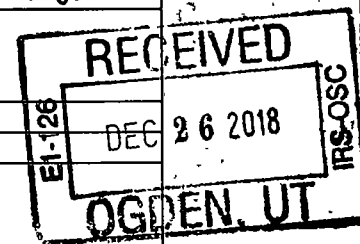
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Part II Balance Sheets

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	750	1,400	1,400
	2 Savings and temporary cash investments	79,114	75,565	75,565
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments—U.S. and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)			
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment: basis ▶			
Less: accumulated depreciation (attach schedule) ▶				
12 Investments—mortgage loans				
13 Investments—other (attach schedule) <u>MUTUAL FUNDS</u>	2,045,217	2,025,504	2,529,994	
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)	2,125,081	2,102,469	2,606,959	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	-0-	-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	2,125,081	2,102,469	
	30 Total net assets or fund balances (see instructions)	2,125,081	2,102,469	
	31 Total liabilities and net assets/fund balances (see instructions)	2,125,081	2,102,469	

**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	2,125,081
2 Enter amount from Part I, line 27a	2	<17,246>
3 Other increases not included in line 2 (itemize) ▶ <u>COST BASIS ADJUSTMENT</u>	3	2,126
4 Add lines 1, 2, and 3	4	2,109,961
5 Decreases not included in line 2 (itemize) ▶ <u>CAPITAL LOSS FROM PART IV</u>	5	<7,492>
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	2,102,469

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	PUBLICLY TRADED SECURITIES			
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 196,620	N/A	204,112	<7,492>
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 N/A	N/A	N/A	<7,492>
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	<7,492>
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.)

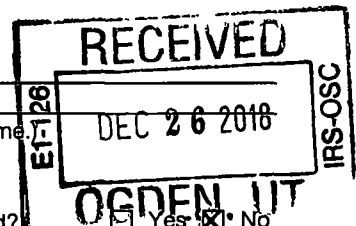
If section 4940(d)(2) applies, leave this part blank.

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

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

(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	154,592	2,253,959	.069
2015	112,009	2,373,354	.047
2014	98,422	2,323,531	.042
2013	71,950	1,858,383	.039
2012	105,615	1,689,533	.062

2 Total of line 1, column (d)	2	.259
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	.052
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	4	2,471,668
5 Multiply line 4 by line 3	5	128,527
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	973
7 Add lines 5 and 6	7	129,500
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	148,899



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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary—see instructions)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b	1	973	
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	973	
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	973	
6	Credits/Payments:			
a	2017 estimated tax payments and 2016 overpayment credited to 2017	6a	972	
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	972	
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	-0-	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	1	
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. ▶ \$ <u>-0-</u> (2) On foundation managers ▶ \$ <u>-0-</u>		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ <u>-0-</u>		
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?		N/A
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. ▶ <u>INDIANA</u>		
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)

	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 ▶ <u>N/A</u>	X	
14 The books are in care of ▶ <u>C.D. YATES</u> Telephone no. ▶ <u>317-730-5141</u> Located at ▶ <u>1489 WINDPUMP WAY, INDIANAPOLIS, IN</u> ZIP+4 ▶ <u>46280-2866</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>N/A</u> ▶ 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?		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? ☐ Yes ☒ No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No		
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No		
b If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b	N/A
Organizations relying on a current notice regarding disaster assistance, check here <u>N/A</u> ▶ ☐		
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	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 ▶ 20____, 20____, 20____, 20____ <u>N/A</u>		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions.)	2b	N/A
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____ <u>N/A</u>		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No		
b If "Yes," did it have excess business holdings in 2017 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2017.)	3b	N/A
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	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?	4b	X

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

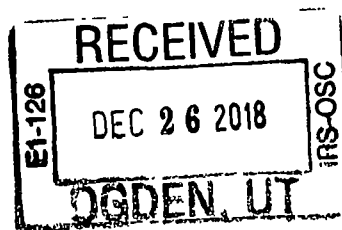
	Yes	No
5a During the year, did the foundation pay or incur any amount to:		
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes	☒ No
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter 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	N/A
Organizations relying on a current notice regarding disaster assistance, check here	N/A	☐
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?	N/A	☐ 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	X
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	N/A

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
LIST ATTACHED - ALL VOLUNTEERS	ALL AS NEEDED	-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

Total number of other employees paid over \$50,000 N/A

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	2,469,106
b	Average of monthly cash balances	1b	40,202
c	Fair market value of all other assets (see instructions)	1c	-0-
d	Total (add lines 1a, b, and c)	1d	2,509,308
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	-0-
2	Acquisition indebtedness applicable to line 1 assets	2	-0-
3	Subtract line 2 from line 1d	3	2,509,308
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	37,640
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,471,668
6	Minimum investment return. Enter 5% of line 5	6	123,583

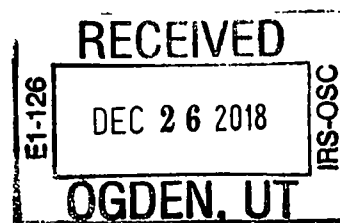
Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations, check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	123,583
2a	Tax on investment income for 2017 from Part VI, line 5	2a	973
b	Income tax for 2017. (This does not include the tax from Part VI.)	2b	-0-
c	Add lines 2a and 2b	2c	973
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	122,610
4	Recoveries of amounts treated as qualifying distributions	4	-0-
5	Add lines 3 and 4	5	122,610
6	Deduction from distributable amount (see instructions)	6	-0-
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	122,610

Part XII Qualifying Distributions (see instructions)

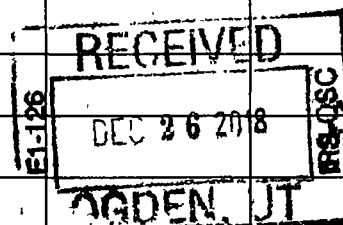
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26	1a	148,899
b	Program-related investments—total from Part IX-B	1b	-0-
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	-0-
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	-0-
b	Cash distribution test (attach the required schedule)	3b	-0-
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	4	148,899
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	973
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	147,926

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				122,610
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	22,384			
b From 2013	-0-			
c From 2014	-0-			
d From 2015	-0-			
e From 2016	44,528			
f Total of lines 3a through e	66,912			
4 Qualifying distributions for 2017 from Part XII, line 4: ▶ \$ <u>148,899</u>				
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	26,289			122,610
e Remaining amount distributed out of corpus	-0-			-0-
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	93,201			
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)	22,384			
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a	70,817			
10 Analysis of line 9:				
a Excess from 2013	-0-			
b Excess from 2014	-0-			
c Excess from 2015	-0-			
d Excess from 2016	44,528			
e Excess from 2017				



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

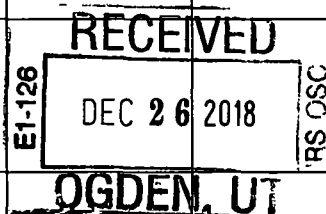
N/A

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)

2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

Tax year	Prior 3 years			(e) Total
(a) 2017	(b) 2016	(c) 2015	(d) 2014	
b 85% of line 2a				
c Qualifying distributions from Part XII, line 4 for each year listed				
d Amounts included in line 2c not used directly for active conduct of exempt activities				
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c				
3 Complete 3a, b, or c for the alternative test relied upon:				
a "Assets" alternative test—enter:				
(1) Value of all assets				
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)				
b "Endowment" alternative test—enter % 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.

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:

VICTOR H. WENNING, PRESIDENT, 10701 EAST 121st ST., FISHERS, IN 46037-9697
VHWENGR@SBCGLOBAL.NET

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

LETTER DESCRIBING PROGRAM, IMPACT ON EDUCATION OF STUDENTS IN STEM, BUDGET AND AMOUNT REQUESTED

c Any submission deadlines:

NO

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

GRANTS MADE PRIMARILY FOR STEM EDUCATION IN CENTRAL INDIANA

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

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

[illegible]

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- 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. *N/A*

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

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.

C. D. YATES
Signature of officer or trustee

11-4-18
Date

EXECUTIVE SEC^y/DIRECTOR

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

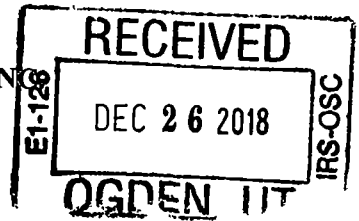
Firm's name ▶

Firm's EIN ▶

Firm's address ►

Phone no

D. J. ANGUS-SCIENTECH EDUCATIONAL FOUNDATION, INC.
1489 Windpump Way, Indianapolis, Indiana 46280-2866
2017 IRS Form 990-PF



Page 1, Part I, Line 1, Contributions and Gifts Received:

<u>Contributor</u>	<u>Date</u>	<u>Amount</u>
Ian R. G Dowdeswell	1/13/17	75.00
Ronald B. and Marcia E. Rice	1/13/17	150.00
George E. McCord	1/17/17	100.00
Patricia S. Mirsky	1/29/17	200.00
William H. Dick, MD	2/6/17	50.00
Raphael Galerman and Sarah McGinnis	2/27/17	25.00
Donald H. and Kathleen M. Willis – Seat on eclipse bus	8/7/17	50.00
Kent Sharp	8/10/17	100.00
The Sciencetech Club	8/15/17	2,500.00
James C. Carter – Eclipse	9/7/17	50.00
Robert G. Reed Trustee and Carlene Reed Trustee	9/11/17	500.00
Thomas W. and Bonnie G. Riley – Auction- Colts Tickets	9/16/17	100.00
William E. and Mary Lou Stanley – Tucson Condo Feb.	10/17/17	1,000.00
Roger and Francine Hurwitz -	10/19/17	35.00
Joseph F. or Mary G. Abella	10/20/17	90.00
Gregory and Shannon Smith – Gift basket	10/21/17	50.00
Douglas K. and Teresa N. Sherow – Auction	10/21/17	945.00
John P. and Kathryn D. Patterson	10/21/17	145.00
M.P. Meisenheimer, M.D. – Donation	10/21/17	80.00
Thomas E. and Ann K. Lunsford	10/21/17	145.00
Karen and Thomas E. Lauer	10/21/17	460.00
Harry and Frances Whitener – Auction	10/21/17	62.00
Mary P. Gosling – Auction	10/21/17	50.00
Helen K. and ASAF A. Goldstein	10/21/17	165.00
William and Kristine Elliott	10/21/17	80.00
William H. Dick, M.D.	10/21/17	250.00
George J. and Donna Cunningham	10/21/17	350.00
V.S. Degler	10/23/17	30.00
Charles H. and Rosanne N. Watson	10/23/17	172.00
Sherri L. and Russell L. Judd – Auction	10/23/17	220.00
William H. Dick, M.D.	10/31/17	417.00
Dr. and Mrs. Robert D. Walton	10/31/17	350.00
Katherine Tyler Scott	11/2/17	150.00
Stephen Nezovich and Christine Shakula	11/6/17	200.00
Evelyn N. & Robert K. Kramer Trust	11/6/17	100.00
Teresa Jean Warren Trierweiler	11/6/17	100.00
Charles H. and Rosanne N. Watson	11/6/17	100.00
Kendall C. Crook	11/6/17	200.00
James C. and Susannah Dillon	11/6/17	250.00
Douglas A. and Janice F. Wagner	11/6/17	250.00

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Page 1, Part I, Line 11, Other Income:

Long Term Capital Gains Distributions	<u>\$39,984.77</u>
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Page 1, Part I, Line 16(b) Accounting Fees:

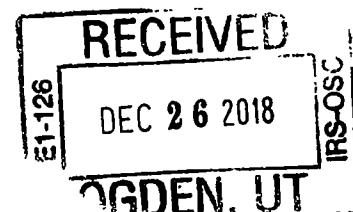
Bookkeeping	<u>\$2,400.00</u>
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Page 1, Part I, Line 18 Taxes:

Federal Excise Tax	\$ 2,000.00
Foreign Tax Withheld	<u>447.57</u>
	<u>\$2,447.57</u>

Page 1, Part I, Line 23, Other Expenses:

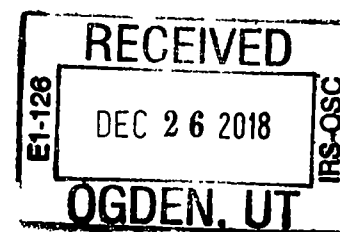
Bank Fees	\$ 530.93
Insurance	660.00
Safety Deposit Box	<u>78.00</u>
	<u>\$1,268.93</u>



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2017 IRS Form 990-PF

Page 2, Part II, Investments:

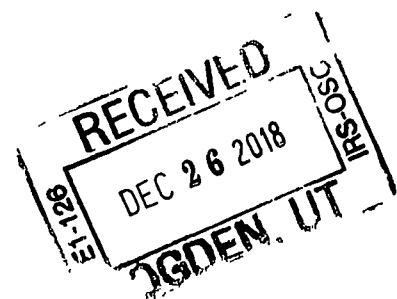
<u>Description</u>	<u>Quantity</u>	<u>Cost</u>	<u>Market Value</u>
Franklin Value Invs. Tr.	2,660.754	112,572.78	104,434.59
Franklin Income Fund Class A	334,995.048	733,565.20	797,288.21
Franklin Growth Fund Class A	3,151.706	72,204.25	297,867.73
Franklin Rising Dividends Fund Class A	4,737.326	140,714.67	289,734.86
Franklin Mutual Series Shares Class A	5,131.881	102,704.92	145,488.83
Templeton Foreign Fund Class A	13,120.264	110,626.82	105,880.53
Templeton Growth Fund Class A	3,935.909	106,055.15	107,292.88
Franklin U.S. Government Class A	6,931.833	60,949.88	56,979.67
Franklin Mutual Service Global Discovery	3,607.219	102,724.44	114,709.56
Templeton Global Bond Fund Class A	7,615.539	99,341.10	90,548.76
Franklin Natural Resources	2,082.225	66,499.43	56,178.43
Franklin Growth Opportunities Fund Class A	3,230.937	98,807.33	117,186.08
Templeton Emerging Markets Small Cap Fund Class A	7,597.607	88,735.47	114,723.87
Franklin Biotechnology Discovery	476.693	70,000.00	71,680.33
Morgan Stanley Bank CD	60,000.000	60,003.00	60,000.00
Total Mutual Funds		2,025,504.44	2,529,994.33
Checking/Savings Accounts/Cash		76,964.83	76,964.83
Total Cash Accounts		76,964.83	76,964.83
Total Investments		2,102,469.27	2,606,959.16



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D. J. ANGUS-SCIENTECH EDUCATIONAL FOUNDATION, INC.
2017 Form 990-PF

Page 6, Part VIII, Officers and Directors:

Mr. Joseph Abella	6441 Harting Overlook, Indianapolis, Indiana 46237
Mr. James E. Baize	10728 Lexington Drive, Indianapolis, Indiana 46280
Ms. Bonnie Carter	7402 East 550 South, Zionsville, Indiana 46077
Mr. George J. Cunningham, Vice President	7940 East 126 th Street, Fishers, Indiana 46038
Mr. Michael O. Chaney	9703 Deerfield Mall, Carmel, Indiana 46032
Dr. William H. Dick	6702 Chapel Crossing, Zionsville, Indiana 46077-7844
Dr. James Dillon	507 Cornwall Court, Carmel, Indiana 46032
Dr. William Elliott, Recording Secretary	13791 Conner Knoll Parkway, Fishers, Indiana 46038
Dr. Gerald J. Kurlander, Treasurer	7917 Spring Mill Road, Indianapolis, Indiana 46260
Mr. Jeff Rasley	6422 Ralston Avenue, Indianapolis, Indiana 46220
Mr. Charles S. Shoup	13045 Abraham Run, Carmel, Indiana 46033
Mr. Steven E. Springer	8252 North Bowline Court, Indianapolis, Indiana 46236
Dr. Teresa Trierweiler	1509 East 79 th Street, Indianapolis, Indiana 46240
Mr. Victor H. Wenning, President	10701 East 121 st Street, Fishers, Indiana 46037-9697
Mr. C. Daniel Yates, Executive Secretary	1489 Windpump Way, Indianapolis, Indiana 46280



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2017 IRS Form 990-PF

Page 11, Part XV, Line 3(a):

Grants and Contributions Paid Out

Year Ended December 31, 2017

Grand Valley State University
Allendale, Michigan 46417

\$12,000.00⁽¹⁾

Indiana University Foundation
Bloomington, Indiana

20,950.00⁽²⁾

Most Improved Student Awards:

Earlham College \$1,000.00
Richmond, Indiana 47374

University of Indianapolis 1,000.00
1400 East Hanna Avenue
Indianapolis, Indiana 46227

IUPUI-Engineering 1,000.00
799 West Michigan Street
Indianapolis, Indiana 46202

Trine University 1,000.00
Angola, Indiana 46703

Marian University 1,000.00
3200 Cold Springs Road
Indianapolis, Indiana 46222

Rose Hulman College 1,000.00
Terre Haute, Indiana 47803

Huntington College 1,000.00
Huntington, Indiana

Valparaiso University 1,000.00
Valparaiso, Indiana

University of Southern Indiana 1,000.00
Evansville, Indiana

Wabash College 1,000.00
Crawfordsville, Indiana 47933

Ball State University 1,000.00
Muncie, Indiana 47306

Manchester University 1,000.00
North Manchester, Indiana 46962

Anderson University 1,000.00
Anderson, Indiana 46011

DePauw University 1,000.00
Greencastle, Indiana

Total Most Improved Student Awards

14,000.00⁽³⁾

Purdue University Foundation
West Lafayette, Indiana

1,000.00⁽⁴⁾

