

Form 990-PF

OMB No 1545-0052

2017

Open to Public Inspection

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

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

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

RETIREMENT RESEARCH FOUNDATION
8765 WEST HIGGINS ROAD #430
CHICAGO, IL 60631-4170

A Employer identification number
36-2429540

B Telephone number (see instructions)
773-714-8080

C If exemption application is pending, check here ☐ 6

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
☐ 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, column (c), line 16)
\$ 146,481,215.

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)				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	2,090,906.	2,090,906.		
	5 a Gross rents				
	b Net rental income or (loss)				
	6 a Net gain or (loss) from sale of assets not on line 10	7,292,116.			
	b Gross sales price for all assets on line 6a	7,292,116			
	7 Capital gain net income (from Part IV, line 2)		7,292,116.		
	8 Net short term capital gain				
	9 Income modifications				
	10 a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule)					
SEE STATEMENT 1		-1,362,923.	-1,382,003.		
12 Total Add lines 1 through 11		8,020,099.	8,001,019.	0.	
ADMINISTRATIVE AND OPERATING EXPENSES	13 Compensation of officers, directors, trustees, etc.	438,932.	71,124.		367,808.
	14 Other employee salaries and wages	625,063.	15,202.		609,861.
	15 Pension plans, employee benefits	299,535.	14,792.		284,743.
	16 a Legal fees (attach schedule) SEE ST 2	441.			441.
	b Accounting fees (attach sch) SEE ST 3	61,100.	25,290.		27,300.
	c Other professional fees (attach sch) SEE ST 4	2,380,063.	2,230,110.		134,306.
	17 Interest	427,125.	427,125.		
	18 Taxes (attach schedule)(see instrs) SEE STM 5	106,934.	55,498.		
	19 Depreciation (attach schedule) and depletion	9,546.	955.		
	20 Occupancy	118,090.	11,809.		106,281.
	21 Travel, conferences, and meetings	51,854.	1,647.		50,207.
	22 Printing and publications	2,744.	274.		2,470.
	23 Other expenses (attach schedule)				
	SEE STATEMENT 6	120,419.	3,634.		117,105.
	24 Total operating and administrative expenses. Add lines 13 through 23	4,641,846.	2,857,460.		1,700,522.
25 Contributions, gifts, grants paid PART XV	5,294,117.			5,760,846.	
26 Total expenses and disbursements Add lines 24 and 25	9,935,963.	2,857,460.	0.	7,461,368.	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	-1,915,864.				
b Net investment income (if negative, enter -0-)		5,143,559.			
c Adjusted net income (if negative, enter -0-)			0.		

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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		826,272.	26,776.	26,776.
	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 sch)				
		Less allowance for doubtful accounts				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges		175,649.	174,481.	174,481.
	10a	Investments — U S and state government obligations (attach schedule)				
	b	Investments — corporate stock (attach schedule) STATEMENT 7		10,052,422.	12,689,729.	12,689,729.
	c	Investments — corporate bonds (attach schedule) STATEMENT 8		3,768,881.	4,700,331.	4,700,331.
	LIABILITIES	11	Investments — land, buildings, and equipment basis			
		Less accumulated depreciation (attach schedule)				
12		Investments — mortgage loans				
13		Investments — other (attach schedule) STATEMENT 9		123,012,726.	128,874,391.	128,874,391.
14		Land, buildings, and equipment basis 270,117.				
		Less accumulated depreciation (attach schedule) SEE STMT 10 254,966.		20,860.	15,151.	15,151.
15		Other assets (describe SEE STATEMENT 11)			356.	356.
16		Total assets (to be completed by all filers — see the instructions. Also, see page 1, item I.)		137,856,810.	146,481,215.	146,481,215.
17		Accounts payable and accrued expenses		59,232.	63,830.	
18		Grants payable		2,480,923.	2,014,194.	
FUND ASSETS	19	Deferred revenue				
	20	Loans from officers, directors, trustees, & other disqualified persons				
	21	Mortgages and other notes payable (attach schedule)				
	22	Other liabilities (describe)				
	23	Total liabilities (add lines 17 through 22)		2,540,155.	2,078,024.	
FUND ASSETS	Foundations that follow SFAS 117, check here and complete lines 24 through 26, and lines 30 and 31. <input checked="" type="checkbox"/>					
	24	Unrestricted		135,316,655.	144,403,191.	
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. <input type="checkbox"/>					
	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				
	30	Total net assets or fund balances (see instructions)		135,316,655.	144,403,191.	
	31	Total liabilities and net assets/fund balances (see instructions)		137,856,810.	146,481,215.	

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	135,316,655.
2	Enter amount from Part I, line 27a	2	-1,915,864.
3	Other increases not included in line 2 (itemize) SEE STATEMENT 12	3	11,002,400.
4	Add lines 1, 2, and 3	4	144,403,191.
5	Decreases not included in line 2 (itemize)	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30	6	144,403,191.

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 shares MLC Company)		(b) How acquired P — Purchase D — Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1 a SEE STATEMENT 13				
b				
c				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a				
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) 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	7,292,116.	
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c). See instructions. If (loss), enter -0- in Part I, line 8.		3	0.	

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

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

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

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

☐ Yes☒ No

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

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	7,039,621.	131,790,163.	0.053415
2015	6,724,390.	138,014,748.	0.048722
2014	6,521,069.	135,039,258.	0.048290
2013	6,757,283.	125,223,430.	0.053962
2012	6,724,091.	119,359,162.	0.056335
2 Total of line 1, column (d)			2 0.260724
3 Average distribution ratio for the 5-year base period — divide the total on line 2 by 5 0, or by the number of years the foundation has been in existence if less than 5 years			3 0.052145
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5			4 140,003,872.
5 Multiply line 4 by line 3			5 7,300,502.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 51,436.
7 Add lines 5 and 6			7 7,351,938.
8 Enter qualifying distributions from Part XII, line 4			8 7,465,205.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

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

1 a 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	51,436.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)			0.
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	51,436.
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	51,436.
6 Credits/Payments			
a 2017 estimated tax pmts and 2016 overpayment credited to 2017	6 a	190,736.	
b Exempt foreign organizations – tax withheld at source	6 b		
c Tax paid with application for extension of time to file (Form 8868)	6 c		
d Backup withholding erroneously withheld	6 d		
7 Total credits and payments. Add lines 6a through 6d	7	190,736.	
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	0.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	139,300.	
11 Enter the amount of line 10 to be Credited to 2018 estimated tax 0. Refunded	11	139,300.	

Part VII-A Statements Regarding Activities

	Yes	No
1 a 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
1 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
1 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 \$ 0. (2) On foundation managers \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0.		
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
4 a 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?	X	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If 'Yes,' attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, col (c), and Part XV	X	
8 a Enter the states to which the foundation reports or with which it is registered. See instructions. IL, MI		
b If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If 'No,' attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2017 or the tax year beginning in 2017? See the instructions for Part XIV. If 'Yes,' complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses		X

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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.	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.	12	X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <u>HTTP://WWW.RRF.ORG</u>	13	X
14 The books are in care of <u>IRENE FRYE</u> Telephone no <u>773-714-8080</u> Located at <u>8765 W HIGGINS RD., STE 430 CHICAGO IL</u> ZIP + 4 <u>60631</u>		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — check here <u>N/A</u> and enter the amount of tax-exempt interest received or accrued during the year <u>15</u> <u>N/A</u>		
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 <u></u>	16	X

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

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

	Yes	No
1 a 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 checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input checked="" type="checkbox"/> Yes <input 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 <u></u>	1 b	X
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?	1 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? If 'Yes,' list the years <u>20</u> <u>20</u> <u>20</u> <u>20</u>	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
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.)	2 b	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 <u>20</u> <u>20</u> <u>20</u> <u>20</u>		
3 a 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.)	3 b	N/A
4 a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4 a	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?	4 b	X

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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 N/A

Organizations relying on a current notice regarding disaster assistance, check here

☐

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?

N/A

7b

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors SEE STATEMENT 14

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 STATEMENT 15				
		438,932.	33,365.	30,000.

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
NANCY ZWEIBEL PHD C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	PROGRAM OFFIC 40	168,311.	25,246.	0.
JULIE KAUFMAN PHD C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	PROGRAM OFFIC 40	153,886.	23,082.	0.
MARY O'DONNELL C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	PROGRAM OFFIC 40	96,972.	14,545.	0.
LEE PARKER MED C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	GRANTS & IT A 40	82,867.	12,403.	0.
MARCIA KUNSTLER C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	OFFICE ADMINI 40	71,700.	10,755.	0.

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

0

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
GLOBAL ENDOWMENT MANAGEMENT 100 N TYRON ST CHARLOTTE, NC 28202	INVESTMENT MGMT	2,189,153.
NAOMI M STANHAUS 720 N LARABEE ST., #204 CHICAGO, IL 60654	PROGRAM CONSULTANT	118,733.
MID-CONTINENT CAPITAL 123 N WACKER DR., #1100 CHICAGO, IL 60606	INVESTMENT MGMT	56,604.
Total number of others receiving over \$50,000 for professional services		0

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 N/A	
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 N/A	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	141,577,435.
b	Average of monthly cash balances	1b	558,476.
c	Fair market value of all other assets (see instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	142,135,911.
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	142,135,911.
4	Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	2,132,039.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	140,003,872.
6	Minimum investment return. Enter 5% of line 5	6	7,000,194.

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	7,000,194.
2a	Tax on investment income for 2017 from Part VI, line 5	2a	51,436.
b	Income tax for 2017 (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	51,436.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	6,948,758.
4	Recoveries of amounts treated as qualifying distributions	4	24,043.
5	Add lines 3 and 4	5	6,972,801.
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	6,972,801.

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	7,461,368.
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	3,837.
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	7,465,205.
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	51,436.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	7,413,769.

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				6,972,801.
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	838,718.			
b From 2013	668,831.			
c From 2014	41,622.			
d From 2015				
e From 2016	357,069.			
f Total of lines 3a through e	1,906,240.			
4 Qualifying distributions for 2017 from Part XII, line 4 ▶ \$ 7,465,205.				
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				6,972,801.
e Remaining amount distributed out of corpus	492,404.			
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	2,398,644.			
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)	838,718.			
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a	1,559,926.			
10 Analysis of line 9				
a Excess from 2013	668,831.			
b Excess from 2014	41,622.			
c Excess from 2015				
d Excess from 2016	357,069.			
e Excess from 2017	492,404.			

BAA

Form 990-PF (2017)

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)

- (4) Gross investment income.

[illegible]

1 Information Regarding Foundation Managers:

- NONE

- NONE

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

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

SEE STATEMENT 16

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

SEE STATEMENT FOR LINE 2A

- c Any submission deadlines

SEE STATEMENT FOR LINE 2A

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

SEE STATEMENT FOR LINE 2A

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
<i>a Paid during the year</i>				
GRANTS PAID FOR GENERAL FUNDING	NONE	PC	SEE ATTACHMENT A	5,575,092.
MATCHING GIFTS PROGRAM	NONE	PC	SEE ATTACHMENT B	185,754.
Total				5,760,846.
<i>b Approved for future payment</i>				
GRANTS PAID TO GENERAL FUNDING	NONE	PC	SEE ATTACHMENT C	2,014,194.
Total				2,014,194.

RETIREMENT RESEARCH FOUNDATION

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STATEMENT 1
FORM 990-PF, PART I, LINE 11
OTHER INCOME

	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
K-1 ORDINARY & OTHER INC	\$-1,382,003.	\$-1,382,003.	
NON-TAXABLE INCOME	-4,205.		
RETURNED GRANTS	24,043.		
UNRELATED BUSINESS INCOME	-758.		
TOTAL	<u>\$-1,362,923.</u>	<u>\$-1,382,003.</u>	<u>\$ 0.</u>

STATEMENT 2
FORM 990-PF, PART I, LINE 16A
LEGAL FEES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
GENERAL CORPORATE MATTERS	\$ 441.			\$ 441.
TOTAL	<u>\$ 441.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>	<u>\$ 441.</u>

STATEMENT 3
FORM 990-PF, PART I, LINE 16B
ACCOUNTING FEES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
AUDITING FEES	\$ 14,850.	\$ 4,000.		\$ 9,850.
BOOKKEEPING, PAYROLL, AND TAX SERVICES	46,250.	21,290.		17,450.
TOTAL	<u>\$ 61,100.</u>	<u>\$ 25,290.</u>	<u>\$ 0.</u>	<u>\$ 27,300.</u>

STATEMENT 4
FORM 990-PF, PART I, LINE 16C
OTHER PROFESSIONAL FEES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT MANAGEMENT, GLOBAL ENDOW FD	\$ 56,604.	\$ 56,604.		
INVESTMENT MANAGEMENT, MID CONTINENT	2,189,153.	2,173,506.		
PROGRAM GRANT EVALUATION CONSULTANTS	134,306.			\$ 134,306.
TOTAL	<u>\$ 2,380,063.</u>	<u>\$ 2,230,110.</u>	<u>\$ 0.</u>	<u>\$ 134,306.</u>

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STATEMENT 5
FORM 990-PF, PART I, LINE 18
TAXES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
EXCISE TAX	\$ 51,436.			
TAX ON FOREIGN DIVIDENDS	55,498.	\$ 55,498.		
TOTAL	<u>\$ 106,934.</u>	<u>\$ 55,498.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>

STATEMENT 6
FORM 990-PF, PART I, LINE 23
OTHER EXPENSES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
COMPUTER EXPENSE	\$ 67,039.			\$ 67,039.
DUES & MEMBERSHIPS	12,712.			12,712.
INSURANCE	23,141.	\$ 2,314.		20,827.
OFFICE SUPPLIES & EXPENSE	16,953.	1,263.		16,010.
POSTAGE & SHIPPING	574.	57.		517.
TOTAL	<u>\$ 120,419.</u>	<u>\$ 3,634.</u>	<u>\$ 0.</u>	<u>\$ 117,105.</u>

STATEMENT 7
FORM 990-PF, PART II, LINE 10B
INVESTMENTS - CORPORATE STOCKS

CORPORATE STOCKS	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
MID-CONTINENT CAPITAL - ETF'S	MKT VAL	\$ 12,689,729.	\$ 12,689,729.
	TOTAL	<u>\$ 12,689,729.</u>	<u>\$ 12,689,729.</u>

STATEMENT 8
FORM 990-PF, PART II, LINE 10C
INVESTMENTS - CORPORATE BONDS

CORPORATE BONDS	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
MID-CONTINENT CAPITAL - CORPORATE BONDS	MKT VAL	\$ 4,700,331.	\$ 4,700,331.
	TOTAL	<u>\$ 4,700,331.</u>	<u>\$ 4,700,331.</u>

RETIREMENT RESEARCH FOUNDATION

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STATEMENT 9
FORM 990-PF, PART II, LINE 13
INVESTMENTS - OTHER

	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
<u>OTHER INVESTMENTS</u>			
GLOBAL ENDOWMENT FUND II LP	MKT VAL	\$ 128874391.	\$128,874,391.
	TOTAL	<u>\$ 128874391.</u>	<u>\$128,874,391.</u>

STATEMENT 10
FORM 990-PF, PART II, LINE 14
LAND, BUILDINGS, AND EQUIPMENT

CATEGORY	BASIS	ACCUM. DEPREC.	BOOK VALUE	FAIR MARKET VALUE
FURNITURE AND FIXTURES	\$ 94,186.	\$ 83,642.	\$ 10,544.	\$ 10,541.
MACHINERY AND EQUIPMENT	175,931.	171,324.	4,607.	4,610.
TOTAL	<u>\$ 270,117.</u>	<u>\$ 254,966.</u>	<u>\$ 15,151.</u>	<u>\$ 15,151.</u>

STATEMENT 11
FORM 990-PF, PART II, LINE 15
OTHER ASSETS

	BOOK VALUE	FAIR MARKET VALUE
SUNDRY	\$ 356.	\$ 356.
TOTAL	<u>\$ 356.</u>	<u>\$ 356.</u>

STATEMENT 12
FORM 990-PF, PART III, LINE 3
OTHER INCREASES

NET UNREALIZED GAINS OR LOSSES ON INVESTMENTS	TOTAL	<u>\$ 11,002,400.</u>
		<u>\$ 11,002,400.</u>

STATEMENT 13
FORM 990-PF, PART IV, LINE 1
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

ITEM	(A) DESCRIPTION	(B) HOW ACQUIRED	(C) DATE ACQUIRED	(D) DATE SOLD
1	FROM FORM K-1 GLOBAL ENDOWMENT FUND II	PURCHASED		
2	FROM FORM K-1 GLOBAL ENDOWMENT FUND II	PURCHASED		
3	FROM FORM K-1 GLOBAL ENDOWMENT FUND II	PURCHASED		
4	FROM FORM K-1 GLOBAL ENDOWMENT FUND II	PURCHASED		
5	FROM FORM K-1 GLOBAL ENDOWMENT FUND II	PURCHASED		

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STATEMENT 13 (CONTINUED)
FORM 990-PF, PART IV, LINE 1
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

ITEM	(A) DESCRIPTION	(B) HOW ACQUIRED	(C) DATE ACQUIRED	(D) DATE SOLD
6	MANAGED TRADES FROM MCC CAPITAL MGMT	PURCHASED		
7	FROM FORM K-1 GLOBAL ENDOWMENT FUND II	PURCHASED		
8	FROM FORM K-1 GLOBAL ENDOWMENT FUND II	PURCHASED	VARIOUS	VARIOUS

ITEM	(E) GROSS SALES	(F) DEPREC. ALLOWED	(G) COST BASIS	(H) GAIN (LOSS)	(I) FMV 12/31/69	(J) ADJ. BAS. 12/31/69	(K) EXCESS (I) - (J)	(L) GAIN (LOSS)
1	1181829.		0.	1181829.				\$ 1181829.
2	2413640.		0.	2413640.				2413640.
3	180,801.		0.	180,801.				180,801.
4	-369,900.		0.	-369,900.				-369,900.
5	2956337.		0.	2956337.				2956337.
6	828,135.		0.	828,135.				828,135.
7	58,590.		0.	58,590.				58,590.
8	42,684.		0.	42,684.				42,684.
							TOTAL	\$ 7292116.

STATEMENT 14
FORM 990-PF, PART VIII
COMPENSATION EXPLANATION

DOWNEY R VAREY

MR VAREY'S COMPENSATION AS TRUSTEE FOR THE YEAR ENDED 12/31/17 TOTALED \$26,000. MR. VAREY WAS ALSO PAID FOR ACCOUNTING, CONSULTING AND TAX RELATED FEES TOTALING \$30,000 FOR THE YEAR ENDED 12/31/17.

STATEMENT 15
FORM 990-PF, PART VIII, LINE 1
LIST OF OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED	COMPEN- SATION	CONTRI- BUTION TO EBP & DC	EXPENSE ACCOUNT/ OTHER
NATHANIEL MCFARLAND, MD C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	CHAIRMAN 9.00	\$ 34,000.	\$ 0.	\$ 0.
RUTH ANN WATKINS C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	TRUSTEE 6.00	26,000.	0.	0.
MICHAEL J STARSHAK C/O RRF 8765 W HIGGINS CHICAGO, IL 60631	SECRETARY 6.00	26,000.	0.	0.
DOWNEY R VAREY C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	TREASURER 6.00	26,000.	0.	30,000.

RETIREMENT RESEARCH FOUNDATION

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STATEMENT 15 (CONTINUED)
FORM 990-PF, PART VIII, LINE 1
LIST OF OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED	COMPEN- SATION	CONTRI- BUTION TO EBP & DC	EXPENSE ACCOUNT/ OTHER
IRENE FRYE C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	PRESIDENT 40.00	\$ 222,432.	\$ 33,365.	\$ 0.
MARILYN HENNESSY C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	TRUSTEE 6.00	21,500.	0.	0.
THOMAS R PROHASKA, PH D C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	TRUSTEE 6.00	18,500.	0.	0.
CHERYL E WOODSON, MD C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	TRUSTEE 6.00	21,500.	0.	0.
KATHLEEN W KOLODGY C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	TRUSTEE 6.00	21,500.	0.	0.
THOMAS D KUCZMARSKI C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	TRUSTEE 6.00	21,500.	0.	0.
TOTAL		\$ 438,932.	\$ 33,365.	\$ 30,000.

STATEMENT 16
FORM 990-PF, PART XV, LINE 2A-D
APPLICATION SUBMISSION INFORMATION

NAME OF GRANT PROGRAM:

NAME:

IRENE FRYE, PRESIDENT

CARE OF:

RETIREMENT RESEARCH FOUNDATION

STREET ADDRESS:

8765 W HIGGINS ROAD, STE 430

CITY, STATE, ZIP CODE:

CHICAGO, IL 60631-4022

TELEPHONE:

773-714-8080

E-MAIL ADDRESS:

FRYE@RRF.ORG

FORM AND CONTENT:

OUR WEBSITE WWW.RRF.ORG CONTAINS THE FORM IN WHICH APPLICATIONS SHOULD BE SUBMITTED ALONG WITH ELIGIBILITY CRITERIA, EXCLUSIONS, AND LETTERS OF INQUIRY WITH REQUIRED INCLUSIONS. WEB INQUIRIES SHOULD BE ADDRESSED TO INFO@RRF.ORG. APPLICATION FORMS CAN BE DOWNLOADED IN WORD FOR COMPLETION.

SUBMISSION DEADLINES:

FEBRUARY 1, MAY 1, AND AUGUST 1

RESTRICTIONS ON AWARDS:

OUR WEBSITE WWW.RRF.ORG CONTAINS THE ELIGIBILITY REQUIREMENTS, RESTRICTIONS OR LIMITATIONS FOR ALL MAJOR GRANT PROGRAMS. THE MAJOR GRANT PROGRAMS ARE AS FOLLOWS: ADVOCACY; DIRECT SERVICE; PROFESSIONAL EDUCATION; RESEARCH; ORGANIZATIONAL CAPACITY BUILDING STANDARD GRANTS; ORGANIZATIONAL CAPACITY BUILDING FLEX-FUND GRANTS AND ACCESSIBLE FAITH GRANTS.

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ATTACHMENT A

Recipient Name and Address	Relationship	Status of Recipient	Purpose of Grant	Amount
A. T. Still University of Health Sciences 800 West Jefferson Kirksville Missouri 63501	NONE	PC	A one-year grant to expand a dental services program for seniors in the St. Louis area	\$31,801
AARP Foundation 601 E Street, NW Washington District of Columbia 20049	NONE	PC	A one-year grant for the Humane Irma Relief Fund and its focus on the Emergency Needs of Older Adults	\$100,000
Advocate Illinois Masonic Medical Center 836 West Wellington Avenue Chicago, Illinois 60657	NONE	PC	A one-year grant for outreach, education, and care coordination to assist older adults with incontinence	\$30,000
Advocate Illinois Masonic Medical Center 836 West Wellington Avenue Chicago Illinois 60657	NONE	PC	A one-year grant for outreach, education and care coordination to assist older adults with incontinence	\$30,860
	NONE			
AgeOptions Inc 1048 Lake Street Suite 300 Oak Park IL 60301		PC	A one-year grant to continue a culturally competent caregiver support program through a network of local churches	\$20,000
AgeOptions Inc 1048 Lake Street, Suite 300 Oak Park, IL 60301	NONE	PC	A one-year grant to build the capacity of Illinois service providers and advocates to ensure older adults have access to the most appropriate and affordable healthcare coverage	\$39,000
AgeOptions Inc 1048 Lake Street Suite 300 Oak Park, IL 60301	NONE	PC	A one-year grant to build the capacity of Illinois service providers and advocates to ensure older adults have access to the most appropriate and affordable healthcare coverage	\$38,000
AgeOptions Inc 1048 Lake Street Suite 300 Oak Park IL 60301	NONE	PC	A one-year grant to build the capacity of Illinois service providers and advocates to ensure older adults have access to the most appropriate and affordable healthcare coverage	\$38,000
AgeOptions Inc 1048 Lake Street Suite 300 Oak Park, IL 60301	NONE	PC	A one-year grant to continue a culturally competent caregiver support program through a network of local churches	\$35,000
AgeOptions, Inc 1048 Lake Street, Suite 300 Oak Park, IL 60301	NONE	PC	A one-year grant to build the capacity of Illinois service providers and advocates to ensure older adults have access to the most appropriate and affordable healthcare coverage	\$42,500
Aging Care Connections 111 West Harns Avenue La Grange, Illinois 60525	NONE	PC	A third-year grant to support a new staffing structure to help bolster financial management and staff retention	\$50,000
Aging Care Connections 111 West Harns Avenue La Grange Illinois 60525	NONE	PC	A third-year grant to support a new staffing structure to help bolster financial management and staff retention	\$53,000
Aging Care Connections 111 West Harns Avenue La Grange, Illinois 60525	NONE	PC	A one month matching grant in conjunction with IL Give 2016	\$5,000
Alliance for Aging Research 1700 K Street NW Suite 740 Washington DC 20006	NONE	PC	A one year grant for membership support	\$30,000

Alzheimer's & Dementia Alliance of Wisconsin 517 N Segoe Rd , #301 Madison, Wisconsin 53705	NONE	PC	A one-year grant to establish three new outreach offices in high need rural and underserved parts of Wisconsin	\$39,972
American Association of Retired Asians 380 S Schmale Road Suite 240 Carol Stream, Illinois 60188	NONE	PC	A six-month grant for an assessment examining the organization's strengths and weaknesses with recommendations on future growth	\$4,400
American College of Cardiology Foundation Heart House 2400 N Street NW Washington, District of Columbia 20037	NONE	PC	A 28-month grant to disseminate the curriculum, Essentials of Cardiovascular Care for Older Adults to nearly 12,000 health professionals in 10 states, to improve care of older adults with cardiovascular disease	\$15,000
American Geriatrics Society 40 Fulton Street 18th Floor New York New York 10038	NONE	PC	A one-year grant for advocacy to improve physician reimbursement for care management of older adults with multiple chronic conditions	\$15,049
American Geriatrics Society 40 Fulton Street 18th Floor New York, New York 10038	NONE	PC	A one-year grant to support efforts to define knowledge gaps and develop a research agenda for sensory impairment and cognitive decline in older adults	\$5,000
American Public Health Association 800 I Street N W Washington DC 20001 3710	NONE	PC	A ten-year grant (\$6,000 each year) for awards to six students annually for research excellence in gerontological health	\$6,000
Antioch Area Healthcare Accessibility Alliance 874 Main Street Antioch, Illinois 60002	NONE	PC	A one-year grant to recruit and train volunteers to provide seniors with transportation to medical appointments	\$18,370
Antioch Area Healthcare Accessibility Alliance 874 Main Street Antioch Illinois 60002	NONE	PC	A one-month matching grant in conjunction with IL Give 2017	\$5,000
Arab American Family Services 9044 South Octavia Avenue Bridgeview Illinois 60455	NONE	PC	A one-month matching grant in conjunction with IL Give 2017	\$5,000
Barrington Area Council on Aging 6000 Garlands Lane, Suite 100 Barrington, Illinois 60010	NONE	PC	An eight-month grant for organizational capacity building to engage in strategic planning	\$31,625
Barrington Area Council on Aging 6000 Garlands Lane Suite 100 Barrington, Illinois 60010	NONE	PC	A one-month matching grant in conjunction with IL Give 2017	\$5,000
Benjamin Rose Institute on Aging 11890 Fairhill Road Cleveland Ohio 44120 1053	NONE	PC	A two-year grant for a randomized clinical trial testing the impact of the SHARE intervention on older adults with chronic conditions and their informal caregivers	\$88,267
Benjamin Rose Institute on Aging 11890 Fairhill Road Cleveland Ohio 44120-1053	NONE	PC	A two-year grant for a randomized clinical trial testing the impact of the SHARE intervention on older adults with chronic conditions and their informal caregivers	\$88,268

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Benjamin Rose Institute on Aging 11890 Fairhill Road Cleveland Ohio 44120-1053	NONE	PC	A 30-month grant to create and market a searchable online resource presenting details about 50 evidence-based dementia caregiving programs to promote their replication and provide families with guidance on where to turn for assistance	\$47,812
Bickerdike Redevelopment Corporation 2550 West North Avenue Chicago, Illinois 60647	NONE	PC	A one-year grant to expand a program offering home repairs to low-income seniors on the Northwest side of Chicago	\$20,000
Blue River Services, Inc 1365 Old Hwy 135 Mailing PO Box 547 Corydon, Indiana 47112	NONE	PC	A second-year grant to help senior housing residents continue to live independently	\$25,300
Cambodian Association of Illinois 2831 West Lawrence Avenue Chicago, Illinois 60625	NONE	PC	A one-month matching grant in conjunction with IL Give 2016	\$5,000
Catholic Charities of the Archdiocese of Chicago 721 North LaSalle Street Chicago Illinois 60654-3503	NONE	PC	A six-month grant to develop a business plan for a fee-for-service homecare program	\$42,135
Catholic Charities of the Archdiocese of Chicago 721 North LaSalle Street Chicago Illinois 60654-3503	NONE	PC	A one month matching grant in conjunction with IL Give 2017	\$5,000
Center for Community Change 1536 U Street NW Washington D C 20009	NONE	PC	A second-year grant of support to continue and expand the structured Leadership Cross-Training Program focusing on the issues faced by senior residents who are owners of manufactured homes	\$35,000
Center for Community Change 1536 U Street NW Washington D C 20009	NONE	PC	A second-year grant of support to continue and expand the structured Leadership Cross-Training Program focusing on the issues faced by senior residents who are owners of manufactured homes	\$35,000
Center for Community Change 1536 U Street NW Washington, D C 20009	NONE	PC	A third-year grant to continue and expand the Leadership Cross-Training Program focusing on issues faced by older residents who own manufactured homes	\$35,000
Center for Disability and Elder Law, Inc 205 W Randolph Suite 1610 Chicago, Illinois 60606	NONE	PC	A second-year grant to provide legal services to low-income seniors	\$35,853
Center for Disability and Elder Law, Inc 205 W Randolph Suite 1610 Chicago, Illinois 60606	NONE	PC	A one month matching grant in conjunction with IL Give 2017	\$5,000
Center for Medicare Advocacy Inc P O Box 350 Willimantic, Connecticut 06226	NONE	PC	A six-month advocacy project to educate policymakers on the negative consequences the ACA's repeal would have on our nation's seniors	\$43,855
Center of Concern 1665 Elk Boulevard Des Plaines Illinois 60016	NONE	PC	A one month matching grant in conjunction with IL Give 2017	\$5,000
Chinese American Service League, Inc 2141 S Tan Court Chicago Illinois 60616	NONE	PC	A one-year grant to implement Enhance Fitness, an evidence-based exercise program for older adults	\$21,638
Chinese American Service League, Inc 2141 S Tan Court Chicago, Illinois 60616	NONE	PC	A second-year grant to continue providing EnhanceFitness an evidence-based fitness program for older adults	\$45,000
Chinese American Service League, Inc 2141 S Tan Court Chicago Illinois 60616	NONE	PC	A one month matching grant in conjunction with IL Give 2017	\$5,000
Chinese Mutual Aid Association 1016 West Argyle Street Chicago, Illinois 60640	NONE	PC	A one month matching grant in conjunction with IL Give 2017	\$5,000
Chicago Public Library Foundation 20 N Michigan Avenue, Suite 520 Chicago, Illinois 60602	NONE	PC	A one-year grant to continue to improve the capacity of the CyberNavigator program to serve older adults better and expand the program to other Chicago Public Library branches	\$35,000

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CJE SeniorLife 3003 W Touhy Avenue Chicago, Illinois 60645	NONE	PC	A one-year grant to update the agency's technology infrastructure to improve organizational efficiency and quality improvement efforts	\$30,000
CJE SeniorLife 3003 W Touhy Avenue Chicago, Illinois 60645	NONE	PC	A one month matching grant in conjunction with IL Give 2017	\$5,000
Coalition of Limited English Speaking Elderly 53 West Jackson Blvd Suite 1340 Chicago, Illinois 60604	NONE	PC	A one-year grant to strengthen and expand language assistance services for limited English speaking Illinois older persons enrolled in managed care	\$45,000
Community Adult Day Care 4501 Main Street Downers Grove, Illinois 60515	NONE	PC	A nine-month grant for board development	\$10,000
Community Adult Day Care 4501 Main Street Downers Grove, Illinois 60515	NONE	PC	A one month matching grant in conjunction with IL Give 2017	\$3,590
Council on Aging of Martin County, Inc 900 SE Salerno Road Stuart, Florida 34997	NONE	PC	A six-month grant to purchase a 17-passenger wheelchair lift bus to transport adult day care clients	\$28,162
Council on Foundations 2121 Crystal Drive Suite 700 Arlington, Virginia 22202	NONE	PC	A one year grant for membership support	\$17,800
Distric III Area Agency on Aging 106 W Young Street P O Box 1078 Warrensburg, Missouri 64093	NONE	PC	A one-year grant to assist older women to become more financially secure through an education program on retirement planning	\$21,155
ElderCARE@ChnstChurch 410 Grand Avenue Waukegan, Illinois 60085	NONE	PC	A second-year grant in support for outreach efforts to serve additional older adults in northern Lake County, Illinois	\$20,000
ElderCARE@ChnstChurch 410 Grand Avenue Waukegan, Illinois 60085	NONE	PC	A third-year grant for outreach efforts to help additional older adults with transportation in northern Lake County, Illinois	\$20,824
ElderCARE@ChnstChurch 410 Grand Avenue Waukegan, Illinois 60085	NONE	PC	A third-year grant for outreach efforts to help additional older adults with transportation in northern Lake County, Illinois	-\$20,824
ElderCARE@ChnstChurch 410 Grand Avenue Waukegan, Illinois 60085	NONE	PC	A one month matching grant in conjunction with IL Give 2017	\$5,000
Elderdag Center, Inc 328 W Wilson Street Batevia, Illinois 60510	NONE	PC	A one month matching grant in conjunction with IL Give 2017	\$5,000
Encore Illinois NFP 501 W Ogden Avenue, Suite 6 Hinsdale, Illinois 60521	NONE	PC	A six-month grant for an organizational assessment to help prioritize organizational capacity building needs	\$5,000
Equal Justice Works 1730 M Street, NW Suite 800 Washington, DC 20036	NONE	PC	A one-year grant for the Elder Justice AmenCorps program which uses attorneys in fellowship positions to address elder abuse, neglect, or exploitation	\$50,000
Escorted Transportation Service Northwest 1801 West Central Road Arlington Heights, Illinois 60005	NONE	PC	A six month grant to engage a consultant to support the development of a strategic plan	\$5,000
Family Alliance, Inc 2028 North Seminary Avenue	NONE	PC	A one month matching grant in conjunction with IL Give 2017	\$5,000

Woodstock Illinois 60098				
Ford Heights Community Service Organization Inc 943 East Lincoln Highway Ford Heights Illinois 60411	NONE	PC	A three-year grant in support of its Senior Wellness & Education Lifestyles program, which helps low-income older adults have healthier lifestyles by addressing food insecurity, chronic heart disease, diabetes, and obesity	\$30,000
Forefront 208 S Lasalle Street Suite 1540 Chicago Illinois 60604	NONE	PC	A one-year grant for membership support	\$11,275
Forefront 208 S Lasalle Street, Suite 1540 Chicago Illinois 60604	NONE	PC	A one-year grant for the Point The Way collaborative initiative, aimed at strengthening capacity building resources for nonprofits in metropolitan Chicago	\$5,000
Generations on Line 1017 Clinton Street Philadelphia, Pennsylvania 19107	NONE	PC	A one-year grant to bring training on touch screen technology and the Internet to low-income seniors in Milwaukee, Kenosha, and Racine	\$28,938
Generations United 25 E Street NW - 3rd floor Suite 900 Washington, DC 20001	NONE	PC	A one-year grant for a collaborative study on intergenerational programming provided in senior housing	\$47,968
Gerontological Society of America 1220 L Street NW, Suite 901 Washington DC 20005	NONE	PC	A three-year grant to continue to educate journalists about new scientific findings, social and policy debates, and innovations and solutions for key aging-related issues	\$15,000
Gerontological Society of America 1220 L Street NW, Suite 901 Washington DC 20005	NONE	PC	A two-year grant for special projects of the Association for Gerontology in Higher Education (AGHE) Advancement Committee	\$50,000
Gerontological Society of America 1220 L Street NW Suite 901 Washington DC 20005	NONE	PC	A one-year grant to further the inclusion of effective family-centered caregiver support practices and programs within long-term services and supports	\$25,000
Gerontological Society of America 1220 L Street NW, Suite 901 Washington, DC 20005	NONE	PC	A one-year grant to further the inclusion of effective family-centered caregiver support practices and programs within long-term services and supports	\$25,000
Grantmakers For Effective Organizations 1725 DeSales Street NW Suite 404 Washington District of Columbia 20036	NONE	PC	A one-year grant to support the 2017 Learning Conference	\$10,000
Grantmakers in Aging 2001 Jefferson Davis Highway, Suite 504 Arlington Virginia 22202	NONE	PC	A one-year grant in support of educational efforts to advance aging philanthropy across the country	\$15,000
Grantmakers in Health 1100 Connecticut Ave N W, Suite 1200 Washington DC 20036-4110	NONE	PC	A one-year grant for membership support	\$2,875
Hana Center 4300 North California Avenue Chicago Illinois 60618	NONE	PC	A second-year grant of support to educate the Korean American community about Alzheimer's disease and other dementias	\$20,000
Hana Center 4300 North California Avenue Chicago Illinois 60618	NONE	PC	A second-year grant of support to educate the Korean American community about Alzheimer's disease and other dementias	\$20,000
Hana Center 4300 North California Avenue Chicago, Illinois 60618	NONE	PC	A one month matching grant in conjunction with IL Give 2017	\$5,000
Hanul Family Alliance 5008 North Kedzie Avenue Chicago Illinois 60625	NONE	PC	A one year grant to sustain stability of the Home Care Program by retaining the four Home Care Field Supervisors	\$30,000
Hanul Family Alliance 5008 North Kedzie Avenue Chicago, Illinois 60625	NONE	PC	A one-year grant to sustain stability of the Home Care Program by retaining the four Home Care Field Supervisors	\$42,000
Hanul Family Alliance 5008 North Kedzie Avenue	NONE	PC	A one month matching grant in conjunction with IL Give 2017	\$5,000

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Chicago, Illinois 60625				
HealthCare Chaplaincy Inc 65 Broadway, 12th Floor New York New York 10006-2503	NONE	PC	A one-year grant to develop a course for nurses and social workers on healthcare teams to help meet the spiritual needs of older persons	\$46,125
Heart2Heart Senior Outreach of South Florida 2701 West Cypress Creek Road Fort Lauderdale Florida 33309	NONE	PC	A second-year grant in support for its program involving volunteers who establish ongoing friendships with isolated nursing home residents	\$40,643
Henry J Kaiser Family Foundation 2400 Sand Hill Road Menlo Park California 94025	NONE	Private Operating Foundation	An 18-month grant for policy research on the potential impact of ACA repeal for older adults	\$50,000
Henry J Kaiser Family Foundation 2400 Sand Hill Road Menlo Park, California 94025	NONE	Private Operating Foundation	An 18-month grant for policy research on the potential impact of ACA repeal for older adults	\$50,000
Hospice of the Florida Suncoast 5771 Roosevelt Blvd #700 Clearwater Florida 33760	NONE	PC	A second-year grant of support to ensure seniors and their caregivers recognize hospice as an option for care at end-of-life and assist physicians to make timely referrals of older patients to hospice care	\$36,293
Hospice of the Florida Suncoast 5771 Roosevelt Blvd #700 Clearwater Florida 33760	NONE	PC	A second-year grant of support to ensure seniors and their caregivers recognize hospice as an option for care at end-of-life and assist physicians to make timely referrals of older patients to hospice care	\$48,565
Housing Opportunities and Maintenance for the Elderly 1419 West Carroll Avenue FL 2 Chicago Illinois 60607	NONE	PC	A third-year grant to strengthen its program that assists seniors with moving services	\$30,000
Housing Opportunities and Maintenance for the Elderly 1419 West Carroll Avenue FL 2 Chicago Illinois 60607	NONE	PC	A one month matching grant in conjunction with IL Give 2017	\$5,000
Housing Options Provided for the Elderly Inc 7300 Dartmouth Avenue, Suite 100 University City Missouri 63130	NONE	PC	A one-year grant to counsel homeowners who have Home Equity Conversion Mortgages that are in arrears	\$40,000
Howard Brown Health Center 4025 North Shendan Road Chicago Illinois 60613	NONE	PC	A one-year grant for a planning grant to develop a more proactive and strategic approach to the organization's Aging Services Department	\$33,000
Illinois Partners for Human Service 33 West Grand Avenue, Suite 300 Chicago, Illinois 60654	NONE	PC	A one-year grant for an organizational capacity building project focused on board development	\$15,000
Indiana University Office of Research Administration 980 Indiana Avenue Lockefield 2232 Indianapolis, Indiana 46202 2915	NONE	PC	A two-year grant to compare the quality of end-of-life care planning in Indiana nursing facilities using and not using the POLST Paradigm	\$51,776
Inner City Computer Stars Foundation dba i c stars 415 N Dearborn Suite 300 Chicago Illinois 60654	NONE	PC	A four-month grant for young adults to teach tech skills to older adults and improve their social connections and comfort level with internet technology	\$15,000
International Institute of Metro St Louis 3401 Arsenal St Saint Louis Missouri 63118	NONE	PC	A one-year grant to launch a program to engage elderly refugees in healthy active gardening activities	\$10,385
Jane Addams Senior Caucus 1111 N Wells Suite 302 Chicago Illinois 60610	NONE	PC	A six month grant for strategic planning	\$5,000
Jane Addams Senior Caucus 1111 N Wells, Suite 302 Chicago Illinois 60610	NONE	PC	A one month matching grant in conjunction with IL Give 2017	\$5,000

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Jewish Family & Career Services 2821 Klempner Way Louisville, Kentucky 40205	NONE	PC	A one-year grant for a pilot program on workforce development, to meet the needs of financially vulnerable older adults	\$25,987
Jewish Family & Community Services of Southwest Florida 5025 Castello Drive Suite 101 Naples Florida 34103	NONE	PC	A one-year grant to continue case management services for older adults with dementia and their caregivers	\$20,000
Jewish Family & Community Services of Southwest Florida 5025 Castello Drive, Suite 101 Naples Florida 34103	NONE	PC	A one-year grant to continue case management services for older adults with dementia and their caregivers	\$20,000
Johns Hopkins University 525 N Wolfe Street, Suite 316 Baltimore Maryland 21205	NONE	PC	A six-month grant for a Summer Research Institute to train scholars to develop, test, and implement novel behavioral interventions with potential to change practice and improve health outcomes for older adults and their families	\$20,000
Justice in Aging 1444 Eye Street, NW, Suite 1100 Washington DC 20005	NONE	PC	A one-year grant for advocacy to end the practice of inappropriate balance billing asking older adults to cover health services costs above what insurers will cover	\$45,000
Justice in Aging 1444 Eye Street, NW, Suite 1100 Washington DC 20005	NONE	PC	A one-year grant to decrease improper balance billing and increase access to healthcare for low income older adults who are dually eligible for Medicare and Medicaid	\$40,000
Kenwood Oakland Community Organization 4242 South Cottage Grove Avenue Chicago, Illinois 60653-2908	NONE	PC	A second-year grant of support to empower low-income, African American older adults to advocate for the preservation and improvement of affordable senior housing in Bronzeville	\$30,000
LAF 120 S LaSalle Street Suite 800 Chicago Illinois 60603-3425	NONE	PC	A one-year grant to provide legal services to low-income Cook County seniors to ensure their financial stability	\$40,000
Lakeview Pantry 3945 N Shendan Road Chicago Illinois 60613-2936	NONE	PC	A one-year grant to deliver healthy meals to approximately 120 additional elderly individuals who are unable to come to a food pantry or other food distribution site	\$20,000
Latino Alzheimer's and Memory Disorders Alliance 4327 N Ottawa Avenue Norridge Illinois 60708	NONE	PC	A one-year grant to expand its dementia support programs to Cicero/Berwyn	\$20,000
Latino Alzheimer's and Memory Disorders Alliance 4327 N Ottawa Avenue Norridge, Illinois 60708	NONE	PC	A one month matching grant in conjunction with IL Give 2017	\$5,000
Legal Aid Society of Palm Beach County Inc. 423 Fern Street, Suite 200 West Palm Beach Florida 33401	NONE	PC	A one-year grant to provide free legal services and education to veterans 65 years and older	\$25,000
Legal Council for Health Justice 17 N State St Suite 900 Chicago Illinois 60602	NONE	PC	A one-year grant to protect the rights of Illinois' low-income seniors to receive medically necessary care through the Community Care and Long-Term Services and Supports Program	\$25,000
Life Matters Media Inc 517 N Racine Avenue Unit 2 Chicago, Illinois 60642	NONE	PC	A one-year grant to promote effective advance care planning conversations in Chatham as a model for the Chicago region	\$19,998
Life Matters Media Inc 517 N Racine Avenue, Unit 2 Chicago Illinois 60642	NONE	PC	A one month matching grant in conjunction with IL Give 2017	\$5,000
Lincoln Park Village Inc 2502 N Clark Street #225 Chicago Illinois 60614	NONE	PC	A one-year grant to expand communications and marketing capacity	\$36,887
Lincoln Park Village, Inc 2502 N Clark Street, #225 Chicago Illinois 60614	NONE	PC	A one month matching grant in conjunction with IL Give 2017	\$5,000

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Little Brothers - Friends of the Elderly 355 North Ashland Avenue Chicago Illinois 60607	NONE	PC	A three-month challenge grant to raise funds for a three-season room at Audrey's House	\$47,500
Little Brothers - Friends of the Elderly 355 North Ashland Avenue Chicago Illinois 60607	NONE	PC	A one month matching grant in conjunction with IL Give 2017	\$5,000
Lutheran Social Services of Northeast Florida, Inc 4615 Phillips Highway Jacksonville, Florida 32207	NONE	PC	A second-year grant of support to deliver food to older adults living in low-income senior housing	\$18,000
Lync Opera of Chicago 20 North Wacker Drive Suite 860 Chicago Illinois 60608	NONE	PC	A one-year grant to support the free Senior Matinee performance of Rigoletto for Chicago seniors	\$7,500
Maplewood Housing for the Visually Impaired dba Fredman Place 5527 N Maplewood Avenue Chicago, Illinois 60625	NONE	PC	A one-year grant to train staff on managing age-related behavioral and physical health services for older adults who are blind or visually impaired	\$15,000

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Maplewood Housing for the Visually Impaired dba Fredman Place 5527 N Maplewood Avenue Chicago, Illinois 60625	NONE	PC	A one month matching grant in conjunction with IL Give 2017	\$5,000
Meals At Home 1123 Emerson Street Suite 213 Evanston Illinois 60201	NONE	PC	A one month matching grant in conjunction with IL Give 2017	\$5,000
Medicare Rights Center 266 West 37th Street, 3rd Floor New York, New York 10018	NONE	PC	A one-year grant in partnership with Center for Medicare Advocacy, to protect older Americans from erosion of affordable, quality healthcare coverage resulting from proposed changes to the Affordable Care Act, Medicare, and Medicaid	\$46,000
Medicare Rights Center 266 West 37th Street 3rd Floor New York New York 10018	NONE	PC	A one-year grant in partnership with Center for Medicare Advocacy, to protect older Americans from erosion of affordable, quality healthcare coverage resulting from proposed changes to the Affordable Care Act, Medicare, and Medicaid	\$46,000
Memorial Foundation Inc 3329 Johnson Street Hollywood Florida 33021	NONE	PC	A third-year grant for the community-based dance, strength training, and boxing programs provided for older persons with Parkinson's disease and their caregivers	\$17,000
Memory Care Home Solutions 4389 West Pine Blvd Saint Louis Missouri 63108	NONE	PC	A third-year grant of support to continue its intervention for caregivers of loved ones with dementia enhanced with occupational therapist visits, and develop the financial infrastructure to sustain this service model	\$45,250
Mercy Housing Lakefront 120 South LaSalle Suite 1850 Chicago, Illinois 60603	NONE	PC	A one-year grant for organizational capacity building to engage in board and resource development	\$26,600
Mercy Housing Lakefront 120 South LaSalle Suite 1850 Chicago Illinois 60603	NONE	PC	A one month matching grant in conjunction with IL Give 2017	\$5,000
Miami University Scripps Gerontology Center 500 E High Street Oxford, Ohio 45056	NONE	PC	A one-year grant to develop a family caregiving communication guide for families with chronically ill older adults	\$30,704
Mid-Florida Area Agency on Aging Inc d/b/a Elder Options 100 SW 75th Street Suite 301 Gainesville Florida 32607	NONE	PC	A one-year grant to plan, develop and launch a volunteer program to increase programs and services for older adults living in three rural counties	\$35,000
Milwaukee Christian Center Inc 807 S 14th St Milwaukee, Wisconsin 53204	NONE	PC	A one-year grant to adapt a fall prevention program, Stepping On for use with Southeast Asian seniors	\$47,600
National Association of Nutrition and Aging Services Programs 1612 K Street NW Suite 200 Washington DC 20006	NONE	PC	A one-year grant to continue research and the gathering of stories about the impact of Congregate Nutrition programs for both nutrition and social connectedness of low-income elderly	\$20,000
National Center for Healthy Housing, Inc 10320 Little Patuxent Parkway Ste 500 Columbia Maryland 21044	NONE	PC	A one-year grant to plan for the establishment of a technical assistance resource center promoting adoption of affordable senior housing with coordinated health and social services	\$50,000
National Committee for Responsive Philanthropy 1900 L Street NW, Suite 825 Washington DC 20036	NONE	PC	A one-year grant for membership support	\$15,000
National Consumer Voice for Quality Long-Term Care 1001 Connecticut Avenue NW Suite 632 Washington, DC 20036-5529	NONE	PC	An 18-month grant for training and advocacy to protect the rights of long-term care residents in facilities that are closing	\$50,000
National Consumer Voice for Quality Long-Term Care 1001 Connecticut Avenue NW Suite 632 Washington DC 20036-5529	NONE	PC	An 18-month grant for training and advocacy to protect the rights of long-term care residents in facilities that are closing	\$49,545
National Consumer Voice for Quality Long-Term Care 1001 Connecticut Avenue NW Suite 632 Washington DC 20036-5529	NONE	PC	An 18-month grant for training and advocacy to protect the rights of long-term care residents in facilities that are closing	\$50,000

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National Council on Aging Inc 251 18th Street South Suite 500 Arlington, Virginia 22202	NONE	PC	A two-year grant to partner with GreenPath to establish a national debt and money management tele-counseling service using an "economic casework" approach and online Economic CheckUp tools	\$61,950
National Council on Aging Inc 251 18th Street South, Suite 500 Arlington Virginia 22202	NONE	PC	A two-year grant to partner with GreenPath to establish a national debt and money management tele-counseling service, using an "economic casework" approach and online Economic CheckUp tools	\$61,955
North Shore Senior Center 161 Northfield Road Northfield, Illinois 60093	NONE	PC	A one month matching grant in conjunction with IL Give 2017	\$5,000
Northwest Side Housing Center 5233 W Diversey Ave Chicago, Illinois 60639	NONE	PC	A second-year grant to support the Age Friendly Banking Project using advocacy to improve access to banking services and products that meet the specific needs of older adults	\$20,000
Northwest Side Housing Center 5233 W Diversey Ave Chicago, Illinois 60639	NONE	PC	A third-year grant for the Age Friendly Banking Program, which uses advocacy to improve access to banking services and products that meet the specific needs of older adults	\$40,000
Northwest Side Housing Center 5233 W Diversey Ave Chicago, Illinois 60639	NONE	PC	A one month matching grant in conjunction with IL Give 2017	\$5,000
Northwestern University Office of Sponsored Research (OSR) 1801 Maple Avenue 2nd Floor #2410 Evanston Illinois 60201-3149	NONE	PC	A two-year grant to study the feasibility of a resistance exercise program targeting frail home-bound elders	\$44,687
Northwestern University Office of Sponsored Research (OSR) 1801 Maple Avenue 2nd Floor #2410 Evanston Illinois 60201-3149	NONE	PC	A one-year grant for a feasibility study to test the impact of emotion regulation training on short-term cognitive function in adults 65 to 80 years old	\$50,000
Norton Healthcare 4967 U S Highway 42, Suite 100 Louisville Kentucky 40202	NONE	None	A one-year grant to strengthen a program that provides effective care transitions for older adults moving from one health care setting to another	\$60,000

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Oak Park River Forest Food Pantry 848 Lake Street Oak Park Illinois 60301	NONE	PC	A one-year grant to deliver nutritious food to low-income, homebound elders	\$10,000
Oasis Institute 11780 Borman Drive St Louis Missouri 63146	NONE	PC	A one-year grant to expand healthy aging programs in Missouri with an emphasis on streamlined coordination and efficiency	\$50,000
Oneida Nation P O Box 385 Oneida Wisconsin 54155	NONE	PC	A one year grant to purchase and install portable ramps to help Oneida elders remain in their homes and keep active in the community	\$16,300
Oral Health Amencia 180 North Michigan Avenue, Suite 1150 Chicago, Illinois 60601	NONE	PC	A third-year grant to make quality improvements in the delivery of a community-based oral health education program for older adults	\$33,336
Oral Health Amencia 180 North Michigan Avenue Suite 1150 Chicago, Illinois 60601	NONE	PC	A third-year grant to make quality improvements in the delivery of a community based oral health education program for older adults	\$33,400
Pension Rights Center 1730 M Street NW Suite 1000 Washington District of Columbia 20036	NONE	PC	A one-year grant to protect retirees from potential pension benefit reductions and find solutions to save financially distressed multi-employer pension plans	\$30,000
Pioneer Network in Culture Change P O Box 18609 Rochester New York 14618	NONE	PC	A five-month grant to share examples of intergenerational programs for improving quality of life among older adults in assisted living or skilled nursing facilities as part of the Pioneer Network Conference to be held July 30-August 2, 2017 at the Hyatt Regency O'Hare	\$10,000
Prairie State Legal Services Inc 303 North Main Street Suite 600 Rockford Illinois 61101	NONE	PC	A one-year grant to continue strengthening legal services that will protect older adults against threats to long-term care	\$26,500
Prairie State Legal Services Inc 303 North Main Street, Suite 600 Rockford Illinois 61101	NONE	PC	A one month matching grant in conjunction with IL Give 2017	\$5,000
Racine Kenosha Community Action Agency Inc 2000 63rd Street Kenosha Wisconsin 53143	NONE	PC	A second-year grant to increase low-income seniors' access to fresh produce	\$37,258
Revitalize Milwaukee 700 W Virginia Street Suite 306 Milwaukee, Wisconsin 53204	NONE	PC	A second-year grant to provide housing repairs and other services to low-income older adults who wish to live independently in safety and health	\$20,000
Rush University Medical Center 1700 W Van Buren Suite 250 Chicago Illinois 60612-3833	NONE	PC	A second-year grant of support to expand its partnership with churches to deliver a comprehensive behavioral health intervention program for older African American women who are overweight, pre-diabetic or have diabetes	\$25,000
Rush University Medical Center 1700 W Van Buren Suite 250 Chicago Illinois 60612-3833	NONE	PC	A second-year grant of support to expand its partnership with churches to deliver a comprehensive behavioral health intervention program for older African American women who are overweight, pre-diabetic or have diabetes	\$25,000
Saint John's Community Care 222 Goethe Avenue Collinsville, Illinois 62234 3306	NONE	PC	A one month matching grant in conjunction with IL Give 2017	\$5,000
Second Presbyterian Church of Chicago 1836 South Michigan Avenue Chicago Illinois 60616	NONE	PC	An 18-month grant to make one restroom accessible	\$25,000
Second Sense 65 E Wacker Place Suite 1010 Chicago Illinois 60601	NONE	PC	A third-year grant of support to build the capacity of community-based low-vision support group leaders to help their members access quality vision rehabilitation information resources, and training	\$16,115
Second Sense 65 E Wacker Place Suite 1010 Chicago Illinois 60601	NONE	PC	A third-year grant of support to build the capacity of community-based, low-vision support group leaders to help their members access quality vision rehabilitation information, resources, and training	\$16,000

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Senior Connections 535 Custer Avenue Evanston Illinois 60202	NONE	PC	A six month grant to work with a consultant on organizational strategic and succession planning	\$5,000
Services for Adults Staying in Their Homes (SASI) 1123 Emerson Street, Suite 200 Evanston Illinois 60201	NONE	PC	A one month matching grant in conjunction with IL Give 2017	\$5,000
Sinsinawa Dominicans 585 County Road Z Sinsinawa Wisconsin 53824-9700	NONE	PC	A one-year grant to conduct an assessment of their buildings to determine the best means of housing retired sisters now and in the future	\$20,000
Sisters of Notre Dame de Namur 701 East Columbia Avenue Cincinnati Ohio 45215-3999	NONE	PC	A two-month grant to purchase equipment that will improve accessibility and safety for retired sisters who reside in the Mount Notre Dame Health Center	\$17,538
Social Security Works Education Fund 1440 G Street NW Washington D C 20005	NONE	PC	A three-year grant to train older adults as effective advocates for Social Security and other retirement security programs on which a majority of older adults rely	\$40,000
Social Security Works Education Fund 1440 G Street NW Washington D C 20005	NONE	PC	A three-year grant to train older adults as effective advocates for Social Security and other retirement security programs on which a majority of older adults rely	\$40,000
Terra Nova Films Inc 9848 South Winchester Avenue Chicago Illinois 60643	NONE	PC	A one-year grant to create a national partnership with the American Library Association and help redefine and reframe individual and societal perceptions of aging and elderhood	\$40,000
Terra Nova Films Inc 9848 South Winchester Avenue Chicago, Illinois 60643	NONE	PC	A one-year grant to create a national partnership with the American Library Association and help redefine and reframe individual and societal perceptions of aging and elderhood	\$44,500
The Arc of the United States 1825 K Street NW Suite 1200 Washington DC 20006	NONE	PC	A second-year grant to assist elderly caregivers of adult children with intellectual and developmental disabilities	\$40,000
The Chicago School of Professional Psychology 325 N Wells 4th Floor Chicago Illinois 60654	NONE	PC	A one-year grant to implement a collaborative, community training program on senior hoarding	\$38,823
The Chicago School of Professional Psychology 325 N Wells 4th Floor Chicago, Illinois 60654	NONE	PC	A one-year grant to implement a collaborative, community training program on senior hoarding	\$38,824
The Foundation Center 32 Old Slip 24th Floor New York, New York 10005-3500	NONE	PC	A one-year grant for membership support	\$12,000
The Salvation Army, A Georgia Corporation 5631 Van Dyke Road Lutz Florida 33558 El Paso, Texas 79968	NONE	PC	A one-year grant to provide emergency assistance and recovery support services for older persons impacted by Hurricane Irma	\$50,000
TimeSlips Creative Storytelling Inc 4461 N Lake Drive Milwaukee, Wisconsin 53211	NONE	PC	An 18-month grant to design and pilot test an online Learning Center, aimed at expanding access to an innovative model for dementia care	\$58,000
Toledo Sisters of Notre Dame 3912 Sunforest Court Suite B Toledo Ohio 43623	NONE	PC	A two-month grant for partial support of upgrades to the elevator to ensure that elderly sisters have full and consistent accessibility in their residence	\$20,000
United Cerebral Palsy Seguin of Greater Chicago 3100 South Central Avenue Cicero Illinois 60804-3987	NONE	PC	A one-year grant to improve the quality of life for older group home residents by increasing the frequency and intensity of nursing care services and improving person-centered care	\$38,400
United Way of Dane County Strategic Collaborations 2058 Atwood Ave	NONE	PC	A one-year grant to expand a program focused on preventing adverse drug events among older adults taking multiple medications	\$25,000

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Madison, Wisconsin 53704				
United Way of Miami-Dade, Inc	NONE	PC	A nine-month grant for advocacy to establish a taxpayer-funded Senior Trust that will improve access to important services for older residents of Miami-Dade	\$65,000
3250 SW 3rd Avenue			County	
Miami Florida 33129 2712				
University of California at San Diego	NONE	PC	A two-year grant for research on the effect of morning bright white light therapy to reduce depressive symptoms and improve quality of life and functioning in patients with early, asymptomatic heart failure	\$37,607
Office of Contract and Grant Administration				
9500 Gilman Drive, MC0934				
La Jolla California 92093 934				
University of Illinois at Chicago	NONE	PC	A one-year grant to expand the reach and accessibility of Fit & Strong! by developing a web-based training curriculum for new instructors in partnership with the National Recreation and Parks Association	\$25,000
University of Illinois at Chicago				
Grants & Contracts				
28395 Network Place				
Chicago, Illinois 60673-1283				

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University of Illinois at Urbana-Champaign Office of Sponsored Programs 1901 S. First Street Suite A Champaign Illinois 61820	NONE	PC	A two-year grant to pilot test the efficacy of a legal services clinic for seniors focused on protecting them from financial abuse	\$42,172
University of Iowa Division of Sponsored Programs 2 Gilmore Hall 112 N. Capitol Street The University of Iowa Iowa City, Iowa 52242	NONE	PC	One-year grant to develop and test a digital disaster preparedness program tool that can be used to support older adults in rural settings	\$50,000
University of Iowa Division of Sponsored Programs 2 Gilmore Hall 112 N. Capitol Street The University of Iowa Iowa City, Iowa 52242	NONE	PC	A one-year grant to study antecedents, consequences, and patterns of medical cannabis use among older persons	\$50,000
University of Massachusetts Boston Office of Research and Sponsored Programs 100 Morrissey Blvd Boston Massachusetts 2125	NONE	PC	A one-year grant to continue providing pension counseling to Illinois retirees, assisting them to retrieve earned pension benefits and addressing other pension problems	\$62,161
University of Massachusetts Boston Office of Research and Sponsored Programs 100 Morrissey Blvd Boston, Massachusetts 2125	NONE	PC	A one-year grant to establish a strategic collaboration with an Illinois organization whose mission aligns with the Illinois Pension Assistance Project to improve fund development and sustainability of the Illinois program	\$35,767
University of Massachusetts Boston Office of Research and Sponsored Programs 100 Morrissey Blvd Boston Massachusetts 2125	NONE	PC	A one-year grant to continue its program to provide pension counseling to Illinois retirees assisting them to retrieve earned pension benefits, and addressing other pension problems	\$50,179
University of North Carolina at Chapel Hill Office of Sponsored Research (OSR) 104 Airport Drive Suite 2200, CB #1350 Chapel Hill North Carolina 27599-1350	NONE	PC	A three-year grant to update the Bathing Without a Battle protocol to continue improving knowledge of nursing home and assisted living staff about bathing persons with dementia including those who speak Spanish	\$35,762
Venice Theatre Inc 140 W. Tampa Avenue Venice FL 34285	NONE	PC	An eight month grant to provide partial funding for the Silver Foxes Programs	\$10,000
Vietnamese Association of Illinois 5110 N. Broadway Chicago Illinois 60640	NONE	PC	A one-year grant for a new intensive health case management program	\$25,000
Villa Guadalupe Senior Services 3201 East 91st Street Chicago Illinois 60617	NONE	PC	A seven-month grant to engage an organizational development consultant	\$3,300
Volunteer Center of Racine County 6216 Washington Avenue, Suite G Racine, Wisconsin 53406	NONE	PC	A second-year grant of support to expand a transportation program for homebound seniors using volunteer drivers	\$15,000
Volunteer Center of Racine County 6216 Washington Avenue Suite G Racine Wisconsin 53406	NONE	PC	A third-year grant to expand a transportation program for homebound seniors, using volunteer drivers	\$15,000

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Voyce	NONE	PC	A one-year grant to expand a program advocating for the rights of individuals living in long term care communities	\$20,000
680 Craig Road Suite 245				
St Louis Missouri 63141				
Washington University in St Louis	NONE	PC	A two-year grant to adapt the fall prevention program "Stepping On" for older adults with cancer	\$72,817
Office of Sponsored Research Services				
One Brookings Drive				
St Louis Missouri 63130-4899				
Western Kentucky University Research Foundation Inc	NONE	SO II	A two-year grant for a randomized clinical trial to test if "Bingocize 2.0" improves fitness and executive function for community-dwelling older adults	\$31,682
1906 College Heights Blvd #11016				
Bowling Green Kentucky 42101-1026				
White Crane Wellness Center	NONE	PC	A second-year grant for a collaborative Falls Prevention Initiative	\$35,000
1657 W Foster Avenue				
Chicago, Illinois 60640				
White Crane Wellness Center	NONE	PC	A second-year grant to continue expanding healthy aging programs in Illinois with an emphasis on streamlined coordination and efficiency	\$30,000
1657 W Foster Avenue				
Chicago, Illinois 60640				
Women's Institute for a Secure Retirement	NONE	PC	A third-year grant to help older adults, especially women, make the best financial decisions they can with the limited resources they have	\$45,000
1140 19th Street N W Suite 550				
Washington, D C 20036				
World Relief DuPage/Aurora	NONE	PC	A third-year grant of support to provide specialized mental health services for older refugees residing in DuPage and Kane counties to help them achieve and maintain independence	\$22,500
1825 College Avenue Suite 230				
Wheaton, Illinois 60187				
World Relief DuPage/Aurora	NONE	PC	A third-year grant of support to provide specialized mental health services for older refugees residing in DuPage and Kane counties to help them achieve and maintain independence	\$22,500
1825 College Avenue Suite 230				
Wheaton, Illinois 60187				
Young Men's Christian Association of the Suncoast Inc	NONE	PC	A one-year grant to expand an arthritis management program	\$20,000
2469 Enterprise Road				
Clearwater, Florida 33763				
			Grand Total	\$5,575,092

Chicago, IL.

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36-2429540

Recipient's Name	Address	Relationship	Foundation Status of	
			Recipient	Amount
St. Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	NONE	PC	4,500 00
English Springer Rescue Amencna Inc	1025 Rose Creek Drive Suite 620-305 Woodstock, Georgia 30189	NONE	PC	150 00
Pam McCloskey Brosnihan Foundation	P O Box 3192 Boynton Beach, Florida 33424-3192	NONE	PC	1,500 00
Free Spirit Media	906 S Homan Ave 5th Floor Chicago, IL 60624	NONE	PC	150 00
Lincoln Park Village, Inc	2502 N Clark Street Chicago, IL 60614	NONE	PC	11,250 00
Umoja Student Development Corporation	910 W Van Buren #710 Chicago, Illinois 60607	NONE	PC	600 00
Sarah's Circle	4838 N Shendan Chicago IL 60640	NONE	PC	600 00
SewHope	3828 Brookside Road Todefo, Ohio 43606	NONE	PC	3,750 00
Dominican University	7900 West Division Street River Forest, Illinois 60305	NONE	PC	4,500 00
St. Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	NONE	PC	4,500 00
Catholic Charities-Archdiocese of Chicago	721 N LaSalle St -4th Floor Chicago, IL 60654-3503	NONE	PC	3,450 00
Advocate Charitable Foundation	3075 Highland Parkway, #600 Downers Grove, IL 60515	NONE	PC	150 00
Final Options Illinois	1055 W Bryn Mawr #F212 Chicago, Illinois 60660	NONE	PC	150 00
Interfaith Action of Evanston	P O Box 1414 Evanston, Illinois 60204	NONE	PC	750 00
University of Illinois Foundation	1305 West Green Street Urbana, IL 61801-2962	NONE	PC	600 00
Holy Spirit Catholic Church	1000 Lantana Road Lantana, FL 33462	NONE	PC	9,000 00
Bethesda Hospital Foundation	2815 S Seacrest Blvd Boynton Beach, Florida 33435	NONE	PC	1,500 00
Catholic Charities of Chicago	721 N LaSalle Street Chicago, IL 60654-3503	NONE	PC	4,050 00
St. Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	NONE	PC	4,500 00
Richard J. Caron Foundation	P O Box 150 Wernersville, Pennsylvania 19565	NONE	PC	150 00
Hanul Family Alliance	5008 N Kedzie Ave Chicago, IL 60625	NONE	PC	750 00
Advocate Charitable Foundation	3075 Highland Parkway, #600 Downers Grove, IL 60515	NONE	PC	1,500 00
St. Vincent de Paul Regional Seminary	10701 S Military Trail Boynton Beach Florida 33436	NONE	PC	1,500 00
Avon Breast Cancer Crusade LLC	P O Box 66120 Washington, DC 20035	NONE	PC	375 00
George Mason University Foundation	4400 University MSN 1A3 Fairfax, Virginia 22030	NONE	PC	3,750 00
San Francisco Hospital Foundation	2789 25th St #2028 San Francisco, CA 94110	NONE	PC	600 00
Hanul Family Alliance	5008 N Kedzie Ave Chicago, IL 60625	NONE	PC	150 00
Arts Wisconsin	P O Box 1054 Madison, Wisconsin 53701	NONE	PC	150 00
Catholic Bishop of Chicago	835 N Rush Street Chicago, IL 60611	NONE	PC	4,500 00
Medicare Rights Center	266 W 37th Street, 3rd Floor New York, New York 10018	NONE	PC	1,500 00
St. Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	NONE	PC	4,500 00
Pam McCloskey Brosnihan Foundation	P O Box 3192 Boynton Beach, Florida 33424-3192	NONE	PC	1,500 00
Diocese of Palm Beach	P O Box 109650 9995 N Military Trail Palm Beach Gardens, Florida 33410	NONE	PC	750 00
St. Baldnck's Foundation Inc	1333 S Mayflower Ave #400 Monrovia, CA 91016	NONE	PC	150 00
Catholic Charities-Archdiocese of Chicago	721 N LaSalle St -4th Floor Chicago, IL 60654-3503	NONE	PC	(3 450 00)
George Mason University Foundation	4400 University MSN 1A3 Fairfax Virginia 22030	NONE	PC	300 00
National Ovarian Cancer Coalition	4900 Hopyard Rd #100 Pleasanton, CA 94588	NONE	PC	600 00
Generations Incorporated	25 Kingston St, 4th Floor Boston, MA 02111	NONE	PC	450 00
St. Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	NONE	PC	4,500 00
American Red Cross	P O Box 37295 Washington, D C 20036	NONE	PC	300 00
Housing Opportunities & Maintenance	for the Elderly 1419 W Carroll Avenue, FL 2 Chicago, IL 60607-1149	NONE	PC	150 00
Housing Opportunities & Maintenance	for the Elderly 1419 W Carroll Avenue, FL 2 Chicago, IL 60607-1149	NONE	PC	750 00
Housing Opportunities & Maintenance	for the Elderly 1419 W Carroll Avenue, FL 2 Chicago, IL 60607-1149	NONE	PC	2 250 00
Saint Philip the Apostle Catholic Church	1962 Old Willow Road Northfield, Illinois 60093	NONE	PC	9,000 00
Chicago Public Library Foundation	20 N Michigan Ave Suite 520 Chicago, IL 60602	NONE	PC	1,500 00
Rainbow Hospice and Palliative Care	1550 Bishop Ct Park Ridge, IL 60056	NONE	PC	150 00
Access Living of Metropolitan Chicago	115 W Chicago Avenue Chicago, IL 60654	NONE	PC	1,200 00
Saint Gabriel Church	731 N Ocean Blvd Pompano Beach, Florida 33062	NONE	PC	900 00
The Bloc	5448 W Berenice Avenue Chicago, Illinois 60641	NONE	PC	750 00
YWCA Evanston/North Shore	1215 Church Street Evanston Illinois 60201	NONE	PC	150 00
Italian American Human Relations Fnd Chgo	624 N Western Avenue Chicago, Illinois 60612	NONE	PC	945 00
Lincoln Park Village, Inc	2502 N Clark Street Chicago IL 60614	NONE	PC	3,000 00
Lincoln Park Village Inc	2502 N Clark Street Chicago, IL 60614	NONE	PC	3,000 00
Coalition Limited EnglishSpeaking Elderly	53 W Jackson Blvd, Ste 1301 Chicago, IL 60604-3552	NONE	PC	750 00
St. Gabriel Catholic Church	731 N Ocean Blvd Pompano Beach, FL 33062	NONE	PC	1,200 00
St. Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	NONE	PC	4,500 00
Leukemia & Lymphoma Society Inc	3715 Northside Parkway Building 400, Suite 300 Atlanta, Georgia 30327	NONE	PC	750 00
Housing Opportunities & Maintenance	for the Elderly 1419 W Carroll Avenue, FL 2 Chicago, IL 60607-1149	NONE	PC	450 00
Central Catholic High School	1201 Airport Road Bloomington, IL 31701	NONE	PC	300 00
Lincoln Park Village, Inc	2502 N Clark Street Chicago IL 60614	NONE	PC	750 00
Catholic Charities-Archdiocese of Chicago	721 N LaSalle St -4th Floor Chicago, IL 60654-3503	NONE	PC	1,500 00
Chicago Food Depository	4100 W Ann Lane Place Chicago Illinois 60632	NONE	PC	150 00

Retirement Research Foundation
Chicago, IL.
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ATTACHMENT B

Recipient's Name	Address	Relationship	Foundation Status of Recipient	Amount
Services & Advocacy for GLBT Elders Inc	305 Seventh Avenue, 15th Floor New York NY 10033	NONE	PC	175 00
Chicago Innovation Foundation	2001 N Halsted #201 Chicago, Illinois 60657	NONE	PC	750 00
Compassion Health Toledo	3828 Brookside Road Toledo, Ohio 43606	NONE	PC	7,500 00
YWCA Evanston/North Shore	1215 Church Street Evanston, Illinois 60201	NONE	PC	150 00
Our Lady of Perpetual Help Parish	1775 Grove Street Glenview, Illinois 60025	NONE	PC	50 00
Dominican University	7900 West Division Street River Forest Illinois 60305	NONE	PC	7,500 00
Presence Health Foundation	200 S Wacker Drive, 11th Flr Chicago Illinois 60606	NONE	PC	150 00
Friends of St Mary's	P O box 3188 Dubuque, Iowa 52004	NONE	PC	750 00
Italian American Human Relations Fnd Chgo	624 N Western Avenue Chicago, Illinois 60612	NONE	PC	540 00
Our Lady of Perpetual Help Parish	1775 Grove Street Glenview, Illinois 60025	NONE	PC	150 00
Loras College	1450 Alta Vista Street Dubuque, Iowa 52001	NONE	PC	4,500 00
George Mason University Foundation	4400 University MSN 1A3 Fairfax, Virginia 22030	NONE	PC	3 750 00
Trinity United Church of Christ	400 W 95th Street Chicago, Illinois 60628	NONE	PC	5,475 00
Giving God the Glory Ministries, Inc	2906 Buttonwood Walk Hazel Crest, Illinois 60429	NONE	PC	3,000 00
Housing Opportunities & Maintenance	for the Elderly 1419 W Carroll Avenue, FL 2 Chicago, IL 60607-1149	NONE	PC	750 00
End Domestic Abuse WI	1245 E Washington #150 Madison, Wisconsin 53703	NONE	PC	175 00
Services & Advocacy for GLBT Elders, Inc	305 Seventh Avenue, 15th Floor New York, NY 10033	NONE	PC	175 00
Seraj Library Project	636 North Harvey Oak Park, Illinois 60302	NONE	PC	750 00
Tree House Humane Society	7225 N Western Avenue Chicago Illinois 60645	NONE	PC	750 00
WTTW-Channel 11	5400 N St Louis Chicago, Illinois 60625	NONE	PC	300 00
United Way of Northeast Florida	P O Box 864228 Orlando, Florida 32886-4228	NONE	PC	150 00
St Teresa of Avila Parish	1950 N Kenmore Chicago, Illinois 60614	NONE	PC	3,750 00
Alzheimer's Association	225 N Michigan 17th Floor Chicago Illinois 60601-7633	NONE	PC	150 00
Trinity United Church of Christ	400 W 95th Street Chicago, Illinois 60628	NONE	PC	1,500 00
IFIC Foundation	1100 Connecticut Avenue NW Washington, DC 20036	NONE	PC	175 00
Greater Houston Community Foundation	5120 Woodway Drive, Suite 6000 Houston, Texas 77056	NONE	PC	150 00
Art Institute of Chicago	111 S Michigan Avenue Chicago, IL 60603	NONE	PC	315 00
Jewish Family & Comm Services of SW FL	Naples Senior Ctr at JFCS 5025 Castello Drive, #101 Naples, FL 34103	NONE	PC	300 00
American Red Cross	P O Box 37295 Washington, D C 20036	NONE	PC	225 00
International Crane Foundation	E11376 Shady Lane Road Baraboo, Wisconsin 53913	NONE	PC	300 00
Impact Behavioral Health Partners	2100 Ridge Avenue #G-320 Evanston, Illinois 60201	NONE	PC	750 00
The Possibility Project	104 W 27th Street, 12th Floor New York, New York 10001	NONE	PC	2,250 00
World Vision	P O Box 9716 Federal Way, Washington 98063	NONE	PC	750 00
Family Matters Inc	7731 N Marshfield Ave Chicago, IL 60626	NONE	PC	150 00
George Mason University Foundation	4400 University MSN 1A3 Fairfax, Virginia 22030	NONE	PC	375 00
George Mason University Foundation	4400 University MSN 1A3 Fairfax, Virginia 22030	NONE	PC	375 00
Chicago Symphony Orchestra	220 S Michigan Ave Chicago, IL 60604	NONE	PC	300 00
Lifeline Theatre	6912 N Glenwood Chicago IL 60626	NONE	PC	225 00
Housing Opportunities & Maintenance	for the Elderly 1419 W Carroll Avenue, FL 2 Chicago IL 60607-1149	NONE	PC	150 00
AgeOptions Inc	1048 W Lake Street Suite 300 Oak Park IL 60301-1102	NONE	PC	750 00
Wayland Academy	101 N University Avenue Beaver Dam, WI 53916	NONE	PC	1,200 00
Hamline University	1536 Hewitt Avenue St Paul, Minnesota 55104	NONE	PC	450 00
American Public Health Association	c/o Accounting Department 800 I Street NW Washington, D C 20001	NONE	PC	375 00
Interfaith Action of Evanston	P O Box 1414 Evanston, Illinois 60204	NONE	PC	225 00
Housing Opportunities & Maintenance	for the Elderly 1419 W Carroll Avenue, FL 2 Chicago, IL 60607-1149	NONE	PC	1,350 00
CJE Senior Life	Council for Jewish Elderly 3003 West Touhy Chicago Illinois 60645	NONE	PC	150 00
Northwest Side Housing Center	5233 W Diversey Chicago Illinois 60639	NONE	PC	150 00
Isabella Foundation	515 Audubon Avenue New York New York 10040	NONE	PC	75 00
University of Illinois Foundation	1305 West Green Street Urbana, IL 61801-2962	NONE	PC	600 00
Services for Adults Staying in Their Homes	1123 Emerson, #200 Evanston, IL 60201	NONE	PC	300 00
Hanul Family Alliance	5008 N Kedzie Ave Chicago, IL 60625	NONE	PC	150 00
Life Matters Media Inc	517 N Racine Avenue, Unit 2 Chicago, Illinois 60642	NONE	PC	150 00
Meals at Home	1123 Emerson Street, Suite 213 Evanston, Illinois 60201	NONE	PC	150 00
Lincoln Park Village Inc	2502 N Clark Street Chicago, IL 60614	NONE	PC	150 00
Homewood Flossmoor High School Fnd	1020 Park Drive, #434 Flossmoor Illinois 60422	NONE	PC	4,419 00
Trinity United Church of Christ	400 W 95th Street Chicago, Illinois 60628	NONE	PC	9,000 00
Center of Concern	1665 Elk Boulevard Des Plaines, Illinois 60016	NONE	PC	150 00
Lydia Home Association	4300 W Irving Park Road Chicago, Illinois 60634	NONE	PC	750 00
Rotary/One Foundation	65 West Jackson Chicago, Illinois 60604	NONE	PC	600 00
Sinsinawa Dominicans, Inc	1585 County Road Z Sinsinawa, WI 53824-9700	NONE	PC	660 00
Total Matching Gifts				185,754 00

Grants Payable in Future Periods

Recipient's Name and Address	Relationship	Foundation Status of Recipient	Purpose of Grant	Schedule Date	Amount
AgeOptions Inc 1048 Lake Street Suite 300 Oak Park IL 60301	NONE	PC	A one-year grant to continue a culturally competent caregiver support program through a network of local churches	4/13/2018	\$20,000
AgeOptions Inc 1048 Lake Street Suite 300 Oak Park IL 60301	NONE	PC	A one-year grant to build the capacity of Illinois service providers and advocates to ensure that older adults have access to appropriate affordable healthcare coverage	7/16/2018	\$42,500
Benjamin Rose Institute on Aging 11890 Fairhill Road Cleveland Ohio 44120-1053	NONE	PC	A 30-month grant to create and market a searchable online resource presenting details about 50 evidence-based dementia caregiving programs to promote their replication and provide families with guidance on where to turn for assistance	4/13/2018	\$43,845
Benjamin Rose Institute on Aging 11890 Fairhill Road Cleveland, Ohio 44120-1053	NONE	PC	A 30-month grant to create and market a searchable online resource presenting affordable details about 50 evidence-based dementia caregiving programs their replication and provide families with guidance on where to turn for to promote assistance	1/15/2019	\$29,417
Center for Community Change 1536 U Street NW Washington D C 20009	NONE	PC	A third-year grant to continue and expand the Leadership Cross-Training Program focusing on issues faced by older residents who own manufactured homes	7/16/2018	\$35,000
CJE SeniorLife 3003 W Touhy Avenue Chicago, Illinois 60645	NONE	PC	A one-year grant to update the agency's technology infrastructure to improve organizational efficiency and quality improvement efforts	1/15/2018	\$18,000
ElderCARE@ChristChurch 410 Grand Avenue Waukegan Illinois 60085	NONE	PC	A third-year grant for outreach efforts to help additional older adults with transportation in northern Lake County, Illinois	1/15/2018	\$20,824
Generations on Line 1017 Clinton Street Philadelphia, Pennsylvania 19107	NONE	PC	A one-year grant to bring training on touch screen technology and the Internet to low-income seniors in Milwaukee, Kenosha and Racine	1/15/2018	\$15,000
Henry J. Kaiser Family Foundation 2400 Sand Hill Road Menlo Park California 94025	NONE	Private Operating Foundation	An 18-month grant for policy research on the potential impact of ACA repeal for older adults	4/13/2018	\$57,983
Hospice of the Florida Suncoast 5771 Roosevelt Blvd #700 Clearwater, Florida 33760	NONE	PC	A third-year grant to help older patients and their caregivers understand hospice as an option for end-of-life care, and help hospital staff with the logistics of timely referrals to hospice care	7/16/2018	\$30,000
Housing Opportunities and Maintenance for the Elderly 1419 West Carroll Avenue, FL 2 Chicago, Illinois 60607	NONE	PC	A third-year grant to strengthen its program that assists seniors with moving services	1/15/2018	\$30,000
Housing Options Provided for the Elderly, Inc. 7300 Dartmouth Avenue, Suite 100 University City, Missouri 63130	NONE	PC	A second-year grant to counsel homeowners who have Home Equity Conversion Mortgages that are in arrears	1/15/2018	\$25,000
Housing Options Provided for the Elderly, Inc. 7300 Dartmouth Avenue, Suite 100 University City Missouri 63130	NONE	PC	A second-year grant to counsel homeowners who have Home Equity Conversion Mortgages that are in arrears	7/16/2018	\$25,000
Illinois Partners for Human Service 33 West Grand Avenue Suite 300 Chicago, Illinois 60654	NONE	PC	A one-year grant for an organizational capacity building project focused on board development	4/13/2018	\$15,000
Indiana University Office of Research Administration 980 Indiana Avenue Lockefield 2232 Indianapolis Indiana 46202-2915	NONE	PC	A two-year grant to compare the quality of end-of-life care planning in Indiana nursing facilities using and not using the POLST Paradigm	4/13/2018	\$50,000
Jewish Family & Community Services of Southwest Florida 5025 Castello Drive Suite 101 Naples Florida 34103	NONE	PC	A third-year grant to continue case management services for older adults with dementia and their caregivers	1/15/2018	\$26,875
Jewish Family & Community Services of Southwest Florida 5025 Castello Drive Suite 101 Naples Florida 34103	NONE	PC	A third-year grant to continue case management services for older adults with dementia and their caregivers	7/16/2018	\$26,875
Justice in Aging 1444 Eye Street, NW, Suite 1100 Washington DC 20005	NONE	PC	A one-year grant to decrease improper balance billing and increase access to healthcare for low-income older adults who are dually eligible for Medicare and Medicaid	4/13/2018	\$40,000
Latino Alzheimer's and Memory Disorders Alliance 4327 N. Ottawa Avenue Normal, Illinois 60706	NONE	PC	A one-year grant to expand its dementia support programs to Cicero/Berwyn	4/13/2018	\$19,687
Legal Aid Society of Palm Beach County, Inc. 423 Fern Street Suite 200 West Palm Beach Florida 33401	NONE	PC	A one-year grant to provide free legal services and education to veterans 65 years and older	4/13/2018	\$24,950
Legal Council for Health Justice 17 N. State St. Suite 900 Chicago Illinois 60602	NONE	PC	A one-year grant to protect the rights of Illinois' low-income seniors to receive medically necessary care through the Community Care and Long-Term Services and Supports Program	4/13/2018	\$25,000

Grants Payable in Future Periods

Recipient's Name and Address	Relationship	Foundation Status of Recipient	Purpose of Grant	Schedule Date	Amount
Life Matters Media, Inc. 517 N Racine Avenue, Unit 2 Chicago, Illinois 60642	NONE	PC	A second-year grant to promote advance care planning conversations in Chatham as a model for the Chicago region	1/15/2018	\$23,032
Lutheran Social Services of Northeast Florida, Inc. 4615 Phillips Highway Jacksonville Florida 32207	NONE	PC	A third-year grant to address food insecurity for low-income older adults by providing regularly scheduled food deliveries to nine low-income senior housing facilities	1/15/2018	\$18,000
Medicare Rights Center 266 West 37th Street 3rd Floor New York New York 10018	NONE	PC	A one-year grant, in partnership with Center for Medicare Advocacy, to protect older Americans from erosion of affordable, quality healthcare coverage resulting from proposed changes to the Affordable Care Act, Medicare, and Medicaid	4/13/2018	\$45,500
Memorial Foundation, Inc. 3329 Johnson Street Hollywood Florida 33021	NONE	PC	A third-year grant for the community-based dance strength training, and boxing programs provided for older persons with Parkinson's disease and their caregivers	1/15/2018	\$17,000
Miami University Office for the Advancement of Research and Scholarship 102 Roubidoux Hall 501 E. High Street Oxford Ohio 45056	NONE	PC	A one-year grant to examine if the increased presence and level of social workers in skilled nursing facilities improves psychosocial functioning and discharge outcomes	1/15/2018	\$49,321
Mid-Florida Area Agency on Aging, Inc. d/b/a Elder Options 100 SW 75th Street Suite 301 Gainesville Florida 32607	NONE	PC	A one-year grant to plan, develop, and launch a volunteer program to increase programs and services for older adults living in three rural counties	1/15/2018	\$34,061
North Shore Senior Center 161 Northfield Road Northfield, Illinois 60093	NONE	PC	A one-year grant to hire a nurse care manager to address complex health-related needs of older adults served by the CareOptions Program	7/16/2018	\$25,000
Northwestern University Office of Sponsored Research (OSR) 1801 Maple Avenue 2nd Floor #2410 Evanston, Illinois 60201-3149	NONE	PC	A two-year grant to study the feasibility of a resistance exercise program targeting frail home-bound elders	1/15/2018	\$44,686
Northwestern University Office of Sponsored Research (OSR) 1801 Maple Avenue 2nd Floor #2410 Evanston, Illinois 60201-3149	NONE	PC	A one-year grant for a feasibility study to test the impact of emotion regulation training on short-term cognitive function in adults 65 to 80 years old	4/13/2018	\$49,956
Racine Kenosha Community Action Agency, Inc. 2000 63rd Street Kenosha Wisconsin 53143	NONE	PC	A second-year grant to increase low-income seniors' access to fresh produce	1/15/2018	\$27,000
Revitalize Milwaukee 700 W. Virginia Street, Suite 306 Milwaukee, Wisconsin 53204	NONE	PC	A second-year grant to provide housing repairs and other services to low-income older adults who wish to live independently in safety and health	4/13/2018	\$20,000
Services for Adults Staying in Their Homes (SASi) 1123 Emerson Street, Suite 200 Evanston Illinois 60201	NONE	PC	A one-year grant for an organizational capacity building project focused on marketing and branding	1/15/2018	\$34,800
The Arc of the United States 1825 K Street NW Suite 1200 Washington DC 20006	NONE	PC	A second-year grant to assist elderly caregivers of adult children with intellectual and developmental disabilities	1/15/2018	\$32,350
TimeSlips Creative Storytelling, Inc. 4461 N. Lake Drive Milwaukee Wisconsin 53211	NONE	PC	An 18-month grant to design and pilot test an online Learning Center, aimed at expanding access to an innovative model for dementia care	7/16/2018	\$58,000
TimeSlips Creative Storytelling, Inc. 4461 N. Lake Drive Milwaukee Wisconsin 53211	NONE	PC	An 18-month grant to design and pilot test an online Learning Center, aimed at expanding access to an innovative model for dementia care	1/15/2019	\$58,865
University of Illinois at Chicago University of Illinois at Chicago Grants & Contracts 28395 Network Place Chicago Illinois 60673-1283	NONE	PC	A one-year grant to expand the reach and accessibility of Fit & Strong! by developing a web-based training curriculum for new instructors in partnership with the National Recreation and Parks Association	1/15/2018	\$25,000
University of Illinois at Chicago University of Illinois at Chicago Grants & Contracts 28395 Network Place Chicago Illinois 60673-1283	NONE	PC	A one-year grant to pilot test a program aimed at helping older adults with intellectual disabilities plan for the future	1/15/2018	\$50,000
University of Illinois at Chicago University of Illinois at Chicago Grants & Contracts 28395 Network Place Chicago Illinois 60673-1283	NONE	PC	A one-year grant to pilot test a program aimed at helping older adults with intellectual disabilities plan for the future	7/16/2018	\$49,026
University of Iowa Division of Sponsored Programs 2 Gilmore Hall 112 N. Capitol Street The University of Iowa Iowa City, Iowa 52242	NONE	PC	A one-year grant to develop and test a digital disaster preparedness program tool that can be used to support older adults in rural settings	1/15/2018	\$49,989
University of Iowa Division of Sponsored Programs 2 Gilmore Hall 112 N. Capitol Street The University of Iowa Iowa City, Iowa 52242	NONE	PC	A one-year grant to study antecedents, consequences, and patterns of medical cannabis use among older persons	4/13/2018	\$69,395
University of Iowa	NONE	PC	An 18-month grant for research to improve the effectiveness of over-the-	1/15/2018	\$57,000

Grants Payable in Future Periods

Recipient's Name and Address	Relationship	Foundation Status of Recipient	Purpose of Grant	Schedule Date	Amount
Division of Sponsored Programs			counter hearing aids		
2 Gilmore Hall					
112 N. Capitol Street					
The University of Iowa					
Iowa City, Iowa 52242					

Grants Payable in Future Periods

Recipient's Name and Address	Relationship	Foundation Status of Recipient	Purpose of Grant	Schedule Date	Amount
University of Iowa Division of Sponsored Programs 2 Gilmore Hall 112 N. Capitol Street The University of Iowa Iowa City, Iowa 52242	NONE	PC	An 18-month grant for research to improve the effectiveness of over-the-counter hearing aids	1/15/2019	\$57,521
University of Massachusetts Boston Office of Research and Sponsored Programs 100 Morrissey Blvd Boston, Massachusetts 02125	NONE	PC	A one-year grant to continue its program to provide pension counseling to Illinois retirees, assisting them to retrieve earned pension benefits, and addressing other pension problems	1/15/2018	\$74,000
University of Minnesota Office of Sponsored Projects Administration 450 McNamara Alumni Center 200 Oak Street S E Minneapolis, Minnesota 55455-2070	NONE	PC	A two-year grant to examine barriers to and strong examples of local and state coordination enabling person-centered, long-term services and supports for financially vulnerable older people	1/15/2018	\$50,477
University of Minnesota Office of Sponsored Projects Administration 450 McNamara Alumni Center 200 Oak Street S E Minneapolis, Minnesota 55455-2070	NONE	PC	A two-year grant to examine barriers to and strong examples of local and state coordination enabling person-centered, long-term services and supports for financially vulnerable older people	10/15/2018	\$59,000
University of Minnesota Office of Sponsored Projects Administration 450 McNamara Alumni Center 200 Oak Street S E Minneapolis, Minnesota 55455-2070	NONE	PC	A two-year grant to examine barriers to and strong examples of local and state coordination enabling person-centered, long-term services and supports for financially vulnerable older people	5/15/2019	\$59,000
University of South Florida Attn: Research Projects Receivables P O Box 864568 Orlando, Florida 32886-4568	NONE	PC	A two-year grant for pilot research on an intervention to improve older adults' cognitive and motor function	10/15/2018	\$43,000
University of South Florida Attn: Research Projects Receivables P O Box 864568 Orlando, Florida 32886-4568	NONE	PC	A two-year grant for pilot research on an intervention to improve older adults' cognitive and motor function	1/15/2018	\$43,533
University of South Florida Attn: Research Projects Receivables P O Box 864568 Orlando, Florida 32886-4568	NONE	PC	A two-year grant for pilot research on an intervention to improve older adults' cognitive and motor function	4/15/2019	\$44,000
University of Southern California 3500 S. Figueroa Street, Suite 102 Los Angeles, California 90089-8001	NONE	PC	A one-year grant to provide state-specific training and promote advocacy networks to enable available and effective home modification services allowing older adults to age in place	7/16/2018	\$30,000
University of Southern California 3500 S. Figueroa Street, Suite 102 Los Angeles, California 90089-8001	NONE	PC	A one-year grant to provide state-specific training and promote advocacy networks to enable available and effective home modification services allowing older adults to age in place	1/15/2018	\$37,312
Vietnamese Association of Illinois 5110 N. Broadway Chicago, Illinois 60640	NONE	PC	A one-year grant for a new intensive health case management program	1/15/2018	\$22,414
White Crane Wellness Center 1657 W. Foster Avenue Chicago, Illinois 60640	NONE	PC	A second-year grant for a collaborative Falls Prevention Initiative	1/15/2018	\$20,000
Young Men's Christian Association of the Suncoast, Inc. 2469 Enterprise Road Clearwater, Florida 33763	NONE	PC	A one-year grant to expand an arthritis management program	1/15/2018	\$15,000
Grand Total					\$2,014,194