Form 990-PF

Return 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.

OMB No 1545-0052 2017

Department of the Treasury

Int	ternal F	Revenue Service	► Go to www.i	s.gov/Form990	<i>PF</i> for instr	uctions and th	e latest in	format	ion. O	pen to Public Inspection		
			or tax year beginning			, 2017	, and end	ing		, 20		
ī	Name o	of foundation						- *	Employer identi	fication number		
	EST!	HER V HAGGE	RTY TRUST 31005	013					36-	<u>-7199</u> 151		
Ī	Numbe	er and street (or PO be	ox number if mail is not delive	te E	Telephone numb	er (see instructions)						
	P ∩ 1	BOX 207			2000 (712)				812-464-1584			
			e, country, and ZIP or foreign p	ostal code	1	JEIVEY	\ _			12 10 1 1501		
	•	•			Γ		$\neg \beta$	0	If exemption applica	ation is		
	EVA	NSVILLE, IN	47702	2	MAY	1 8 2018	OSO		pending, check her	٠		
		ck all that apply:	Initial return			of a former p		rity r	1. Foreign organiza	tions check here		
		,	Final return	Am	ended-re	turn.	= =		2. Foreign organiza	· · · · · · · · · · · · · · · · · · ·		
			Address change	Nai	me cháng	BEN, U	1		85% test, check i computation			
H	Che	ck type of organiz	zation: X Section 50	1(c)(3) exemp	t private f	oundation		\Box .	·			
ſ	s	ection 4947(a)(1) n	onexempt charitable trust	Other t	axable pr	ivate foundat	tion 🔱			n status was terminated		
ī	Fair	market value o	of all assets at JAco	ounting meth	od: X C	ash Acc	rual	F	If the foundation is	in a 60-month termination		
	end	of year (from Par	rt II, col. (c), line	Other (specify))					o)(1)(B),check here . >		
_		<u>▶</u> \$, column (d) mu	st be on ca	sh basis.)						
i	art	Analysis of Rev total of amounts:	enue and Expenses (Ti	(4) 110 4611		(b) Net inve	estment	(c)	Adjusted net	(d) Disbursements for charitable		
		may not necessari	ily equal the amounts in	expense book		incon	ne		income	purposes (cash basis only)		
_	1	column (a) (see in		 		<u> </u>		<u></u>		15-5 Busin only)		
2	1 2	Check Y If th	its, etc., received (attach schedule) e foundation is not required to			 				 		
ノ	3	απа نتيا	ch Sch. B	1		 						
1	4	-	est on savings and temporary cash investments. Jends and interest from securities		1,356.		1,398.					
'	5a											
	Ь	Net rental income or	(loss)									
نو	6a	Net gain or (loss) from	n sale of assets not on line 10		3,129.							
Revenue	b	Gross sales price for a	all 9,94:	3,343			 					
ě	7	Capital gain net inc	come (from Part IV, line 2)				3,129.					
~	8	Net short-term cap	ıtal gain	•								
	9 10a	Gross sales less retur		•					 -			
	١,	and allowances Less Cost of goods s		<u> </u>						 		
	1	-	s) (attach schedule)									
	11		ch schedule)		48.							
_	12	Total. Add lines 1	through 11		4,533.		4,527.					
	13	Compensation of office	cers, directors, trustees, etc.		1,396.		<u> 269.</u>			1,127.		
Sec	14	Other employee sa	laries and wages	·		<u> </u>	NONE		NONE			
			ployee benefits			<u> </u>	NONE		NONE			
Z X	16a		schedule)			ļ	17037		370377			
Ğ	b	-	ttach schedule)STMT 1		900.	 	NONE		NONE	900.		
ativ	C	•	fees (attach schedule)	F :		 	-			 		
Administrative Expen	17		dule) (see instru stidis 2.2		15.		15.			 		
Ē	18 19		ch schedule) and depletion			 	ب_ ب					
Ę	20	•	scnedule) and depletion							 		
Ā	21		s, and meetings				NONE		NONE			
ou.	21 22		cations	L .	<u> </u>		NONE		NONE			
Ď	23		tach schedule) STMT. 3		15.							
iţi	24		id administrative expense									
ěr.	23 24 25		gh 23		2,326.		284.		NONE			
č	25		s, grants paid		4,700.					4,700.		
_	26	_	bursements. Add lines 24 and 2		7,026.		284.		NONE	6,727.		
	27	Subtract line 26 from	om line 12									
	а		expenses and disbursements .		2,493.	ļ						
			come (if negative, enter -0-				4,243.					
_	C	Adjusted net inco	me (if negative, enter -0-).	· _		Ĺ				5 000 DE 100 E		

Part II		Balance Sheets	Attached schedules and amounts in the description column should be for end-of-year	Beginning of year		End of year		
_			amounts only. (See instructions.)	(a) Book Value	(b) Book Value	(c) Fair Market Value		
	1	Cash - non-interest-bearing	ng					
l	2		cash investments					
	3					-		
i			otful accounts -					
	4	Pledges receivable ▶						
			otful accounts					
	5							
	6		officers, directors, trustees, and other					
			ach schedule) (see instructions)					
	7		eceivable (attach schedule)	,				
ĺ			otful accounts NONE					
Assets	8		e					
SS	9		eferred charges					
٩			government obligations (attach schedule)					
			stock (attach schedule)					
	11 ^C	Investments - corporate Investments - land, building and equipment. basis Less accumulated deprecia (attach schedule)						
		(attach schedule)						
	12 13 14	Investments - mortgage Investments - other (atta- Land, buildings, and	loans	74,897.	72,402.	97,502		
		equipment basis Less accumulated deprecia (attach schedule)			·			
	15	Other assets (describe			_			
			completed by all filers - see the age 1, item I)	74,897.	72,402.	97,502		
	17	Accounts payable and a	ccrued expenses					
	18	Grants payable		·				
Liabilities	19	Deferred revenue						
Ħ	20	Loans from officers, director	s, trustees, and other disqualified persons		,			
<u>ia</u>			tes payable (attach schedule)					
ᅦ	22	Other liabilities (describe)					
\rfloor	23	Total liabilities (add lines	s 17 through 22)		NONE			
		Foundations that follow	SFAS 117, check here					
Balances		and complete lines 24 t	hrough 26, and lines 30 and 31.					
and	24	Unrestricted						
Sal	25	Temporarily restricted .						
핑	26	Permanently restricted .						
틸		Foundations that do not	follow SFAS 117, check here 🕨 🐰					
빏		and complete lines 27 t	hrough 31.					
S	27 28 29 30 31	Capital stock, trust princi	pal, or current funds	74,897.	72,402.			
set	28	Paid-in or capital surplus, or	land, bldg., and equipment fund					
As	29	Retained earnings, accumula	ited income, endowment, or other funds					
et	30		balances (see instructions)	74,897.	72,402.			
Z		Total liabilities and						
		instructions)		74,897.	72,402.			
			ges in Net Assets or Fund Balar					
1			alances at beginning of year - Part I					
_			on prior year's return)			74,897.		
			ine 27a			<u>-2,493.</u>		
			ed in line 2 (itemize) ►		3			
			long 2 (itamina) brommand garne	• • • • • • • • • • • • • • • • • • • •		72,404.		
			line 2 (itemize) PROUNDING - SALES	E\ D II	5	72.402		
	rota	net assets or jund ba	lances at end of year (line 4 minus li	ne ο) - raπ II, column (b)), line 30 6	72,402.		

Part IV Capital Gains and Losses for Tax on Investment Income

	cribe the kind(s) of property sold (for e ck warehouse; or common stock, 200	• •	(b) How acquired P - Purchase	(c) Date acquired (mo , day, yr)	(d) Date solo (mo., day, yr.
a PUBLICLY TRADED S	SECURITIES		D - Donation		
b			†		
. -					
d					
e					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale		(h) Gain or (lo ((e) plus (f) min	
a 9,943.		6,814.			3,129
b		0,0=3.			0/155
C					
d					
е					
Complete only for assets sho	wing gain in column (h) and owned I	by the foundation on 12/31/69.	(0)	Gains (Col. (h) ga	in minus
(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		(k), but not less t Losses (from co	han -0-) or
a				-	3,129
b					
С					
d					
e					
ection 4940(d)(2) applies, l	private foundations subject to the eave this part blank.	luced Tax on Net Investment In a section 4940(a) tax on net investre section 4940(a) tax on net invest	nent inco		Yes X
Yes," the foundation doesn't	qualify under section 4940(e). D				تقبا ا
Enter the appropriate am	(b)		ig any en	(d)	
Base period years alendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets		Distribution rat	
2016	6,721.	87,825.	<u> </u>	(col. (b) divided by	0.07652
2015	9,942.	94,181.			0.10556
2014	4,769.	98,614.			0.04836
2013	5,265.				0.05533
2012	5,961.	93,730.			0.06359
		337,331	<u> </u>		0.0000
Total of line 1. column (d)		2		0.34938
		de the total on line 2 by 5.0, or by			
		if less than 5 years	3		0.06987
and maniper or years are	odination had been in oxidioned	micot man o youro			
Enter the net value of nor	scharitable-use assets for 2017 fi	rom Part X, line 5	4		93,279
and the relation				<u> </u>	, ~
Multiply line 4 by line 3.			5		6,518
monaphy mio + by mic o.					•
Enter 1% of net investme	nt income (1% of Part I line 27h)		6		42
-1101 1/0 01 1101 1114 0311110					
Add lines 5 and 6			7		6,560
dd iiiloo o diid o , , , , ,					
					6,727
If line 8 is equal to or gi Part VI instructions.	reater than line 7, check the box	k in Part VI, line 1b, and complete	that part	using a 1% ta	x rate. See

orm 9	990-PF (2017) 36-7199151			age 4						
Part	VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see i	nstru	ctions	<u>s)</u>						
	Exempt operating foundations described in section 4940(d)(2), check here and enter "N/A" on line 1									
	Date of ruling or determination letter (attach copy of letter if necessary - see instructions)									
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check			<u>42.</u>						
	here ► X and enter 1% of Part I, line 27b									
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of J									
	Part i, line 12, col. (b).									
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)			ONE 42.						
3	3									
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)									
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0									
6	Credits/Payments:									
а	2017 estimated tax payments and 2016 overpayment credited to 2017 6a 8 .									
b	Exempt foreign organizations - tax withheld at source									
C	Tax paid with application for extension of time to file (Form 8868) 6c NONE									
đ	Backup withholding erroneously withheld									
7	Total credits and payments. Add lines 6a through 6d			8.						
8	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached 8									
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			34.						
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid									
11_	Enter the amount of line 10 to be: Credited to 2018 estimated tax ► NONE Refunded ► 11									
	VII-A Statements Regarding Activities	- F	1							
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it		Yes	No_						
	participate or intervene in any political campaign?	1a		<u> </u>						
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the	ا ا		v						
	instructions for the definition	1b		<u> X</u>						
	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.	.		v						
_	Did the foundation file Form 1120-POL for this year?	1c		<u>X</u>						
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:									
	(1) On the foundation. > \$									
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed									
	on foundation managers. \$	2		Х						
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.									
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of	3		X						
_	incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	4a		<u> </u>						
	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4b								
	If "Yes," has it filed a tax return on Form 990-T for this year?	5		X						
5	If "Yes," attach the statement required by General Instruction T.									
	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:									
6	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?	6	Х							
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	7	Х							
, 8a	Enter the states to which the foundation reports or with which it is registered. See instructions.									
Oa	IL IN									
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General									
J	(or designate) of each state as required by General Instruction G ⁷ If "No," attach explanation	8b	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	9		<u>x</u>						
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their									
10	names and addresses	10		X						
	Fo	rm 99	0-PF	2017)						

Statements Regarding Activities (continued) Yes No No No No No No No N	Form	99 0 -PF (2017) 36~7199151		F	age 5
Yes No meaning of section 512(b)(13)? If Yes' stitch schedule. See instructions 11 X X X X X X X X	Par		•		
meaning of section 512(b) 137 1 Yes, "attach schadule, See instructions		<u> </u>		Yes	No
meaning of section 512(D) 137 1 Yes, attach schodule, See instructions 12 Did the foundation make a distribution to a doner advised fund over which the foundation or a desqualified person had advisory privileges? 17 Yes, "trach statement, See instructions 20 Did the foundation comply with the public inspection regularizement for its annual returns and exemption application? Website address > DOLD NATIONAL WEALTH MANAGEMENT Telephone no. > (812) 464-1584 14 The books are in care of > OLD NATIONAL WEALTH MANAGEMENT Telephone no. > (812) 464-1584 15 Section 4947(a)(1) nonexempt charitable trusts filing form 930-PT in lisu of Form 1041 check here and the search of the security of section of the search of the security of t	11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the			
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disquisition person has disking privileges? If Yes, "attach statement. See instructions 13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? 14 The books are meter of ▶ OLD NATTONAL WEALTH MANAGEMENT 15 Section 4947[a/11] nonexampt chantable trusts filing Form 930-PF in lieu of Form 1041 - check here			11		Ιx
13 Did the foundation comply with the public inspection requirements for its annual returns and examption application	12				
13 Did the foundation comply with the public inspection requirements for its annual returns and examption application		person had advisory privileges? If "Yes," attach statement. See instructions	12		х
Website address N/A	13			Х	
Located at P.P.O. BOX 207, EVANSVILLER, IN ZIP4 4 4702 15 Section 447(Bit1) nonexempt; charatels trusts fliling Form 930-PF in lieu of Form 1041 . check here		/-			
Located at P.P.O. BOX 207, EVANSYLLER, IN ZIP44 47702 15 Section 4476(It) nanexempt chartable trusts fliling form 980-PF in lieu of Form 1041 check here and enter the amount of tax-exempt interest received or scorued during the year. 16 At any time during calendar year 2017, did the foundation have an interest in or a signature or other authonity over a bank, securities, or other financial account in a foreign country? 18 See the instructions for exceptions and filing requirements for FinCRN Form 114, If "Yes," enter the name of the foreign country between the form 4720 May Be Required File Form 4720 if any them is checked in the "Yes" column, unless an exception applies. 19 Parl VII.8 Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any them is checked in the "Yes" column, unless an exception applies. 10 During the year, did the foundation (either directly or indirectly): 11 Engage in the sele or exchange, or leasing of property with a disqualified person? 12) Form know money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? 13) Furnish goods, services, or facilities to (or accept them from) a disqualified person? 14) File Form (and the foundation to, or pay or reimburse the expenses of, a disqualified person? 15) Furnish goods, services, or facilities to (or accept them from) a disqualified person? 16) 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, it terminating within 90 days.) 16) If any answer is "Yes" to all (116), did any of the acts fall to qualify under the exceptions described in Regulations section 53.491(16)-3 or in a current notice regarding disaster assistance, check here 2 Taxes on failure to distribute income (section 4942(a)) to a provision of section 4942(a) to a provision of section 4942(a) to a provision of section 4942(a) to a provision of	14	The books are in care of ▶ OLD NATIONAL WEALTH MANAGEMENT Telephone no. ▶ (812) 464	-158	4	
15 Section 4947/a(III) nonexempt chantable trusts filing Form 980-PF in lieu of Form 1041 check here		Located at ▶ P.O. BOX 207, EVANSVILLE, IN ZIP+4 ▶ 47702			
16 At any time during calendar year 2017, did the foundation have an interest in or a signature or other authorny 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	15			▶	
See the instructions for exceptions and filing requirements for FINCEN Form 114. If "Yes," enter the name of the foreign country Park VILSD 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. 1a During the year, did the foundation (either directly or indirectly): 1] Engage in the sale or exchange, or leasing of property with a disqualified person?		and enter the amount of tax-exempt interest received or accrued during the year			
See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country Part VILBS 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. 12	16	At any time during calendar year 2017, did the foundation have an interest in or a signature or other authority		Yes	No
Part VII-9 Statements Regarding Activities for Which Form 4720 May Be Required		over a bank, securities, or other financial account in a foreign country?	16		Х
Part VII-9 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. 1a During the year, did the foundation (either directly or indirectly): 11 Engage in the sale or exchange, or leasing of property with a disqualified person?					
1a During the year, did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person?	Par	Statements Regarding Activities for Which Form 4720 May Be Required	-		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?		File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		Yes	No
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?. Yes X No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?. Yes X No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?. X Yes No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.]. Yes X 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 section 53.4941 (d)-3 or in a current notice regarding disaster assistance. Acek here. c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2017? 2 Taxes on failure to distribute income (setion 4942) (dos not apply for years the foundation was a private operating foundation defined in section 4942(i)(3) or 4942(i)(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?. 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? (lif applying section 4942(a)(2) to all years listed, answer "No" and attach statement see instructions.) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. 3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at an	1a	During the year, did the foundation (either directly or indirectly):			
disqualified person?		(1) Engage in the sale or exchange, or leasing of property with a disqualified person? Yes X No			
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?					
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?. X Yes No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?					
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?. X Yes No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?		(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes X No			
the benefit or use of a disqualified person)?. (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.). 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. 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? 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? 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) (relating to incorrect valuation of assets) to the year's undistributed income? (if applying section 4942(a)(2) to all years listed, answer "No" and attach statement -see instructions.) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. D 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 grift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holdings of schedule C, Form 4720, to determine if the foundation had excess business holdings in 2017.) 4a Did the foundation ma					
(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.)					
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.). Solution S		the benefit or use of a disqualified person)?			
termination of government service, if terminating within 90 days.)		(6) Agree to pay money or property to a government official? (Exception. Check "No" if the			
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		foundation agreed to make a grant to or to employ the official for a period after			
Section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions		termination of government service, if terminating within 90 days.)			
Organizations relying on a current notice regarding disaster assistance, check here c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2017?	b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations			
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?		section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b		<u>X</u>
were not corrected before the first day of the tax year beginning in 2017?		Organizations relying on a current notice regarding disaster assistance, check here			
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 XIIII) for tax year(s) beginning before 2017?	С	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that			
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?			1c		<u>X</u>
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?	2				
6 e, Part XIII) for tax year(s) beginning before 2017?		operating foundation defined in section 4942(j)(3) or 4942(j)(5)):			
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.)	а				
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ——————————————————————————————————					
(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.)					
all years listed, answer "No" and attach statement - see instructions.) c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ——————————————————————————————————	b				
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.					
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?			2b		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	C	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.			
at any time during the year?					
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.)	За				
disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2017.) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 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 20177 4b X					
Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2017.) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 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 20177 4b X	b				
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.)					
foundation had excess business holdings in 2017.) 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 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 20177 4b X					
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4a X b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 20177 4b 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 20177 4b X					
charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2017? 4b X		• • • • • • • • • • • • • • • • • • • •	4a	الحصوص	<u>X</u>
	b				Ţ.
- 000 DF :				O DE	

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

-0- -0- -0- -0-

NONE Form **990-PF** (2017)

3 F	ive highest-paid independent contractors for professional services. See instructions, If none, enter "NON	E."
	(a) Name and address of each person paid more than \$50,000 (b) Type of service	(c) Compensation
ONTE		NON
ONE_		NON
otal n	umber of others receiving over \$50,000 for professional services	NON
art I	Summary of Direct Charitable Activities	
	e foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of izations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 <u>NOI</u>	E	
		
-		
4		
art 1		Amount
1 NON	be the two largest program-related investments made by the foundation during the tax year on lines 1 and 2. [F.	Amount
		1
2		
	ner program-related investments. See instructions.	
3 NOI	JE	

Form	990-PF (2017) 36-7199151		Page 8
Par	Minimum Investment Return (All domestic foundations must complete this part. Fore see instructions.)	ign foundation	ons,
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc.,		
	purposes:		
а	Average monthly fair market value of securities	1a	94,699.
b	Average of monthly cash balances		NONE
C	Fair market value of all other assets (see instructions)		NONE
d	Total (add lines 1a, b, and c)	1d	94,699.
e	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation)		
2	Acqui sition indebtedness applicable to line 1 assets	2	NONE
3	Subtract line 2 from line 1d	3	94,699.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see		
	instru ctions)	4	1,420.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	93,279.
6	Minimum investment return. Enter 5% of line 5 · · · · · · · · · · · · · · · · · ·	6	4,664.
Par	Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating four and certain foreign organizations, check here ▶ and do not complete this part.)	ndations	
1	Minimum investment return from Part X, line 6	1	4,664.
2 a	Tax on investment income for 2017 from Part VI, line 5 2a 42		
- b	Income tax for 2017. (This does not include the tax from Part VI.) 2b		
c	Add lines 2a and 2b	1 2c	42.
3	Distrilbutable amount before adjustments. Subtract line 2c from line 1	3	4,622.
4	Recoveries of amounts treated as qualifying distributions	4	NONE
5	Add lines 3 and 4	5	4,622.
6	Deduction from distributable amount (see instructions)	6	NONE
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII,		
	line 1	7	4,622.
Par	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	6,727.
b	Program-related investments - total from Part IX-B		0//2/.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc.,		
	purposes	2	NONE
3	Amounts set aside for specific charitable projects that satisfy the:		
а	Suitability test (prior IRS approval required)	3a	NONE
b	Cash distribution test (attach the required schedule)		NONE
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	6,727.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income.		<u> </u>
	Enter 1% of Part I, line 27b. See instructions	5	42.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	6,685.
	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when ca		
	qualifies for the section 4940(e) reduction of tax in those years.		

Form **990-PF** (2017)

Part XIII Undistributed Income (see instructions) (a)	ge U
Iline 7	
2 Undistributed income, if any, as of the end of 2017 a Enter amount for 2016 only	
a Enter amount for 2016 only	<u>22.</u>
b Total for prior years 20	
a From 2012	
a From 2012	
b From 2013	
c From 2014	
d From 2015	
e From 2016	
f Total of lines 3a through e	
4 Qualifying distributions for 2017 from Part XII, line 4: ▶ \$ 6,727. a Applied to 2016, but not more than line 2a b Applied to undistributed income of prior years (Election required - see instructions) c Treated as distributions out of corpus (Election required - see instructions)	
Inne 4:	
a Applied to 2016, but not more than line 2a b Applied to undistributed income of prior years (Election required - see instructions) c Treated as distributions out of corpus (Election required - see instructions)	
b Applied to undistributed income of prior years (Election required - see instructions) c Treated as distributions out of corpus (Election required - see instructions)	
(Election required - see instructions)	
c Treated as distributions out of corpus (Election required - see instructions)	
required - see instructions) NONE d Applied to 2017 distributable amount	
d Applied to 2017 distributable amount	
2 105	22.
- · · · · · · · · · · · · · · · · · · ·	ONE
(If an amount appears in column (d), the same	
amount must be shown in column (a).) 6 Enter the net total of each column as	
indicated below:	
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	
b Prior years' undistributed income. Subtract	
line 4b from line 2b	
c Enter the amount of prior years' undistributed no prior years' years' undistributed no prior years' years' years' years' years' years' years' years' years	
been issued, or on which the section 4942(a)	
tax has been previously assessed NONE	
d Subtract line 6c from line 6b. Taxable	
amount - see instructions	
4a from line 2a. Taxable amount - see	
instructions	
f Undistributed income for 2017. Subtract lines	
4d and 5 from line 1. This amount must be distributed in 2018	ONE
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) NONE	
8 Excess distributions carryover from 2012 not	
applied on line 5 or line 7 (see instructions) NONE	
9 Excess distributions carryover to 2018.	
Subtract lines 7 and 8 from line 6a	
10 Analysis of line 9.	
a Excess from 2013 NONE	
b Excess from 2014 NONE	
c Excess from 2015 2,691.	
d Excess from 2016 2,346.	
e Excess from 2017 2 , 105	

	Driveta On				O)	rage 10
				and Part VII-A, questic		NOT APPLICABL
1 a	If the foundation has	received a ruling or d	letermination letter the	at it is a private opera	ting	//
	foundation, and the ruling	is effective for 2017, en	ter the date of the ruling	1	▶	
				-		0(1)(0) 1 40(0)(1)(5)
D	Check box to indicate v		is a private operating		Section 494.	2(j)(3) or 4942(j)(5)
2-	Enter the lesser of the ad-	Tax year		Prior 3 years		(e) Total
Za	justed net income from Part	(a) 2017	(b) 2016	(c) 2015	(d) 2014	(e) Total
	or the minimum investment					- //
	return from Part X for each		•	i		
	year listed					_ <u>/ </u>
h	85% of line 2a			1		
D	85 /6 01 11116 24					
C	Qualifying distributions from Part			1		
	XII, line 4 for each year listed					
d	Amounts included in line 2c not					
	used directly for active conduct					
	of exempt activities			<u> </u>		
е	Qualifying distributions made				/	
	directly for active conduct of			1		
	exempt activities. Subtract line		1			
	2d from line 2c					
3	Complete 3a, b, or c for the		İ			ľ
	alternative test relied upon					
а	"Assets" alternative test - enter					
	(1) Value of all assets					
	(2) Value of assets qualifying			//		
	under section			, · *		
	4942(j)(3)(B)(i)			/	-	
þ	"Endowment" alternative test-					
	enter 2/3 of minimum invest-		/			İ
	ment return shown in Part X,					
	line 6 for each year listed		///////////////////////////////////////	1		
C	"Support" alternative test - enter			1		
	(1) Total support other than	1				
	gross investment income					
	(interest, dividends, rents,			<u> </u>		
	payments on securities loans (section 512(a)(5)),		Ī	1		
	or royalties)			1		
	(2) Support from general			1		
	public and 5 or more		1	1		
	exempt organizations as		1	1		
	provided in section 4942					
	(j)(3)(B)(iii)			+	 	_
	(3) Largest amount of sup- port from an exempt		1			1
	organization					1
	(4) Gross investment income .					
Do		tom Information //	Complete this part	only if the foundat	ion had \$5 000	or more in assets at
LC				only if the loundat	ion nau \$5,000	or more in assets at
	any time d	uring the year - see	instructions.)			
1	Information Regarding	ı Foundation Manageı	rs:			
а	List any managers of	the foundation who l	nave contributed mo	re than 2% of the tota	L contributions rece	eived by the foundation
•	before the close of any	tax year (but only if th	nev have contributed	more than \$5,000). (Se	e section 507(d)(2)	1
	22.0.0 0.000 0. 2,	, , , ,	,	+0,000,. \-	0 000 0 0 1 (0)(2)	••
	NONE					
h	List any managers of	the foundation who	own 10% or more of	of the stock of a corno	ration for an equa	lly large portion of the
				n has a 10% or greater		my large pertion of the
	Ownership of a partile	simp or other entity) of	winch the loundatio	ii iias a 10 /6 Oi gleater	iiiterest.	
	NONE					
_	T. C. S.	04-:	O'6 Lana Cabalanah			
2	Information Regarding	Gontribution, Grant,	Gift, Loan, Scholarsr	lip, etc., Programs:		
	Check here ▶ if t	he foundation only	makes contributions	to preselected charit	able organizations	and does not accept
						under other conditions,
				ants, etc., to maividual	a or organizations	ander other conditions,
	complete items 2a, b,	c, and d. See instruction	ons.			
a	The name, address, an	d telephone number o	r email address of the	e person to whom appli	cations should be a	ddressed.
	SEE STATEMENT					
b	The form in which app	lications should be sul	omitted and informati	on and materials they s	nould include:	
	SEE ATTACHED ST	וו פרד דמקאקדען	NE 2			
	DEE ATTACHED B.	TITEMENT FOR HI	2			
C	Any submission deadli	nes:				
	SEE ATTACHED ST		NF 2			
	SEE ALIACHED 5.	TATEMENT FOR DI	.1111 2			
_						
d	Any restrictions or li	mitations on awards	, such as by geogr	raphical areas, charital	ole fields, kinds o	f institutions, or other
	factors:		•			
	SEE ATTACHED ST	TATEMENT FOR LI	NE 2			

orm 990-PF (2017) Part XV Supplementary Information	(continued)			Page
3 Grants and Contributions Paid Duri	ng the Vear or Anni	oved for F	inture Payment	
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation		<u></u>
Name and address (home or business)	any foundation manager	status of recipient	Purpose of grant or contribution	Amount
a Paid during the year	or substantial contributor	- I GOLPIGHT		
ANVILLE AREA COMMUNITY COLLEGE				
000 E MAIN ST DANVILLE IL 61832	NONE	PC	SCHOLARSHIPS	1,35
				1,33
INIVERSITY OF INDIANAPOLIS	NOVE	20	action and the control	
400 E HANNA AVE INDIANAPOLIS IN 46227	NONE	PC	SCHOLARSHIPS	1,00
INDIANA STATE UNIVERSITY				
00 N 7TH ST TERRE HAUTE IN 47809	NONE	PC	SCHOLARSHIPS	1,00
PURDUE UNIVERSITY				
510 PURDUE MALL WEST LAFAYETTE IN 47907	NONE	PC	SCHOLARSHIPS	1,00
MILLIKIN UNIVERSITY				
1184 W MAIN STREET DECATUR IL 62522	NONE	PC	SCHOLARSHIPS	35
Total			▶ 3a	4,70
b Approved for future payment				
Total			▶ 3b	

nter gross amounts unless otherwise indicated.	Unrela	ated business income	Excluded by	section 512, 513, or 514	(e)
1 Program service revenue	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	Related or exempt function income (See instructions.)
a					
b					
c					
d					
θ	<u> </u>		ļ		
f	<u> </u>		-		
g Fees and contracts from government agencies					
2 Membership dues and assessments			 - -		
3 Interest on savings and temporary cash investments	_		14	1 256	
4 Dividends and interest from securities			14	1,356.	
5 Net rental income or (loss) from real estate					
a Debt-financed property	·		 		
b Not debt-financed property					-
6 Net rental income or (loss) from personal property			_		
7 Other investment income	l		18	3,129.	
8 Gain or (loss) from sales of assets other than inventory			1	3,123.	
9 Net income or (loss) from special events · · · 0 Gross profit or (loss) from sales of inventory					
1 Other revenue: a					
b OTHER REVENUE			1	48.	
c					
d					
8					
2 Subtotal. Add columns (b), (d), and (e)				4,533.	
3 Total. Add line 12, columns (b), (d), and (e)					4,533
See worksheet in line 13 instructions to verify calcu					
Part XVI-B Relationship of Activities	to the A	ccomplishment of E	xempt Pur	ooses	
Explain below how each activit accomplishment of the foundation					
			_		
					
		,		 ·	
	 .				,
					
				··	
					
					
		NOT APPLICABL	E	···	
					-

Form 9	90-PF (2	017)	_				36-7199151		Pa	ge 13
Part	XVII	Information F Exempt Orga		ansfers to	and Transact	tions ar	nd Relationships With	Nonchari	table)
	in sec				•	-	any other organization descrition 527, relating to pol		Yes	No
а	Transfe	ers from the reportin	g foundation to	a noncharita	ble exempt orga	nization o	of:			
									4	X
	• •	ner assets transactions:			• • • • • • • •	• • • • •		1a(2)	-	Х
)	Х
	-			•	-					X
										X
	-	_								X
	-	_							F	X
C	Sharin	g of facilities, equipn	nent, mailing lis	its, other asse	ets, or paid emplo	oyees .		1c	į	Х
							Column (b) should always			
	value i	of the goods, other	assets, or serv	ices given by	y the reporting f	oundation	n. If the foundation received e of the goods, other assets	less than	fair n	narket
	ne no.	(b) Amount involved			empt organization		escription of transfers, transactions, a			
(0)		(5) (1)	(0,110		p. 0. gc22	1 (4,5)	occupation of transfera, transactions, t	nd sharing arr	angeme	
						-				
						-				
						<u> </u>				
	-+									
						-	· · · · · · · · · · · · · · · · · · ·			
							· · · · · · · · · · · · · · · · · · ·			
	describ	ed in section 501(c)	(other than se				ore tax-exempt organizations	1 1	es 🔼	No
	11 168,	" complete the follow (a) Name of organization		(b)	Type of organization		(c) Description of r	elationship		
	_									
	Under	penalties of perjury, I decl	are that I have exam	ined this return, in	ncluding accompanying	schedules an	nd statements, and to the best of my k	nowledge and	belief, it	is true,
Sign	compt	ina wear a wear bridge of the contract of the	hriviänägeine	(axpayer) is based o	n all information of which	h preparer has	s any knowledge	the IRS discu	ss this	return
Here	Sign	nature of officer or trustee	ec run	U5/ Date	02/2018	Title		the preparer	shown Yes	below? No
	1 -	D NATIONAL WE	ALTH MANAC			11116	366 III	structions 7	7 169	
		Print/Type preparer's na		gerayer's	New Year	11.	Date Check	_{if} PTIN		
Paid		KELLY KOWALC	ZYK	Kel	CAN	los	05/02/2018 self-emplo	yed P013	876	36
•	arer		NST & YOU		T.P		Firm's EIN	34-6565		
Use	Only		5 N. WACKE					0 070 7		
—		ı CH	IICAGO, II	J	60	<u> </u>	Phone no 31	2-879-2		(2017)

STATEMENT

FORM 990PF, PART I - ACCOUNTING FEES

CHARITABLE PURPOSES	900. NE 900.
ADJUSTED NET INCOME	NONE
NET INVESTMENT INCOME	NONE
REVENUE AND EXPENSES PER BOOKS	.006
	(NON-ALLOC TOTALS
DESCRIPTION	TAX PREPARATION FEE (NON-ALLOC TOTALS

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	NET	INVESTMENT	INCOME	1 1 1 1	13.	2.	15.	11 12 11 11 11 11 11 11 11 11
REVENUE	AND	EXPENSES	PER BOOKS	1 1 1 1 1 1	13.	2.	15.	
			DESCRIPTION	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	FOREIGN TAXES ON QUALIFIED FOR	FOREIGN TAXES ON NONQUALIFIED	TOTALS	

310057013

FORM	990PF,	PART	I -	OTHER	EXPENSES
=====	======	=====	===	======	=======

DESCRIPTION		REVENUE AND EXPENSES PER BOOKS	
OTHER NON-ALLOCABLE EXPENSE -			15.
	TOTALS		15.
		=========	====

ESTHER V HAGGERTY TRUST 310057013 FORM 990PF, PART XV - LINES 2a - 2d

RECIPIENT NAME:

DARCY SHEPHERD, GUIDANCE COUNSELOR

ADDRESS:

CATLIN HIGH SCHOOL

CATLIN, IL 61817

RECIPIENT'S PHONE NUMBER: 214-427-5331

FORM, INFORMATION AND MATERIALS:

APPLICATION FORM ATTACHED

SUBMISSION DEADLINES:

THE FRIDAY 3 WEEKS PRIOR TO THE OPT

EVENING OF EXCELLENCE

RESTRICTIONS OR LIMITATIONS ON AWARDS:

FULL TIME STUDENT OF CATLIN HIGH SCHOOL

ATTENDING A COMMUNITY COLLEGE OR UNIVERSITY

IN THE FALL