859

Form 990-PF
Department of the Treasury

EXTENDED TO NOVEMBER 15, 2018 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.
 ▶ Go to www.irs.gov/Form990PF for instructions and the latest information.

2017
Open to Public Inspection

F	or calendar year 2017 or tax year beginning		, and ending		
_	Name of foundation			A Employer identification	number
	GOLDBERG FAMILY FOUNDATION	43-6884613			
	Number and street (or P O box number if mail is not delivered to street a	ddress)	Room/suite	B Telephone number	
_	C/O LYNN G INTRATER, 10412			913-385-99	97
ı	City or town, state or province, country, and ZIP or foreign p OVERLAND PARK, KS 66212	ostal code		C If exemption application is pe	ending, check here
G	Check all that apply: Initial return	Initial return of a fo	ormer public charity	D 1. Foreign organizations	, check here
	Final return	Amended return		0.5	
_	Address change	Name change	(_	Foreign organizations me check here and attach cor	mputation
H	Check type of organization: X Section 501(c)(3) ex			E If private foundation sta	
<u>_l</u>		Other taxable private founda		under section 507(b)(1)	(A), check here
ı	Fair market value of all assets at end of year Accounts	-	Accrual	F If the foundation is in a	
	(from Part II, col. (c), line 16)	ther (specify)	1 2	under section 507(b)(1)	(B), check here
. 「	Part Analysis of Revenue and Expenses			(a) Adjusted not	(d) Disbursements
m/ -	(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	for charitable purposes (cash basis only)
<i>∧</i>	1 Contributions, gifts, grants, etc., received			N/A	
/	2 Check X If the foundation is not required to attach Sch B Interest on savings and temporary	1.00	1.00		Cm > Mr > CD > m
	3 cash investments	168. 80,750.	168. 79,645.		STATEMENT 1 STATEMENT 2
	4 Dividends and interest from securities	80,730.	79,043.		STATEMENT Z
	5a Gross rents b Net rental income or (loss)	, , , , , , , , , , , , , , , , , , ,			
	6a Net gain or (loss) from sale of assets not on line 10	<12,935.>	* **	. ;	,
	b Gross sales price for all 198,301.	A. (RECIEV	En II	\$. * · · · · · · · · · · · · · · · · · ·
σc	7 Capital gain net income (from Part IV, line 2)	4 . ¥ · 2/4		200 2	* ** ** **
2018	8 Net short-term capital gain	4\$ 14V	8 2 050	18 0-8	\$ ¹
(9 Income modifications Gross sales less returns	ž <i>žž</i> 2° 9 °	φ 3E, 24,21	10	#
er3	10a and allowances	3 3 3			,′
 -	b Less Cost of goods sold	X X · ·	OGDEN,	UT % & A	***
)G	c Gross profit or (loss)	74.	0.		STATEMENT 3
\circ	11 Other income 12 Total. Add lines 1 through 11	68,057.	79,813.		STATEMENT J
SCANNFO DCT	13 Compensation of officers, directors, trustees, etc	0.	0.		0.
1	14 Other employee salaries and wages				
ै	15 Pension plans, employee benefits				
W	3 16a Legal fees		<u> </u>		
	b Accounting fees c Other professional fees STMT 4 STMT 5	8,269.	4,135.		4,134.
		14,213.	7,106.		7,107.
	17 Interest 18 Taxes STMT 6 Depreciation and depletion 20 Occupancy	046	241	<u> </u>	0.
	18 Taxes STMT 6	946.	241.		- 0.
	열리9 Depreciation and depletion 로20 Occupancy			 	
	21 Travel, conferences, and meetings				
	23 Other expenses STMT 7	355.	355.		0.
	딒 24 Total operating and administrative				
	Printing and publications Other expenses STMT 7 Total operating and administrative expenses. Add lines 13 through 23	23,783.	11,837.	<u></u>	11,241. 150,878.
	25 Contributions, gifts, grants paid	150,878.		ļ	150,878.
	26 Total expenses and disbursements.		44		
_	Add lines 24 and 25	174,661.	11,837.		162,119.
	27 Subtract line 26 from line 12:	106 604			
	a Excess of revenue over expenses and disbursements	<106,604.>	67,976.		
	b Net investment income (if negative, enter -0-) c Adjusted net income (if negative, enter -0-)	<u> </u>		N/A	

If gain, also enter in Part I, line 8, column (c).

If (loss), enter "-0-" in Part I, line 8

If gain, also enter in Part I, line 8, column (c). If (loss), enter *-0-* in Part I, line 8

Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):

N/A

See the Part VI instructions.

	PF (2017) GOLDBERG FAMILY FOUNDATION				43-688			Page 4
Part V	Excise Tax Based on Investment Income (Section 4940)(a), 4	940(b), 49	40(e), or 49	48 - see i	nstruc	tions	3)
1a Exer	npt operating foundations described in section 4940(d)(2), check here 🕒 🔲 and e	nter "N/A	N° on line 1.) T				
	of ruling or determination letter: (attach copy of letter if nec			ns)	ļ			
b Dom	estic foundations that meet the section 4940(e) requirements in Part V, check here 🏽 🕨	▶ □	and enter 1%)	1		<u>1,3</u>	<u> 60.</u>
of Pa	art I, line 27b							
c All o	ther domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4%	of Part	I, line 12, col.	(b). J				
	under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only, of	hers, ent	er -0-)		2			0.
	lines 1 and 2				3		1,3	
	itle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; of	thers, en	ter -0-)		4			0.
	based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-				5		1,3	<u> </u>
	its/Payments:	1 .	i	1 200				
	estimated tax payments and 2016 overpayment credited to 2017	6a		1,320.				
	npt foreign organizations - tax withheld at source	6b		0.				
	paid with application for extension of time to file (Form 8868)	6c		1,040.				
	up withholding erroneously withheld	<u>6d</u>	L	0.			<u>ດ</u> -ວັ	<u></u>
	l credits and payments. Add lines 6a through 6d r any penalty f or underpayment of estimated tax. Check here 🔀 if Form 2220 is atta	ahad			7	<u> </u>	2,3	0.
	due. If the total of lines 5 and 8 is more than line 7, enter amount owed	icnea			8			<u> </u>
	payment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid				9		1,0	00
	r the amount of line 10 to be: Credited to 2018 estimated tax		1,000.	Pofunded	10		1,0	0.
	II-A Statements Regarding Activities		1,000.	neiuliaea 🚩	11			- • •
	ng the tax year, did the foundation attempt to influence any national, state, or local legis	lation or	did it particin	ate or intervene		\top	Yes	No
	political campaign?	101101101	ara it partion	ato or intorvono		1a		X
	t spend more than \$100 during the year (either directly or indirectly) for political purpose	ses? See	the instruction	ons for the defini	tion	1b		X
	answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of							
	ibuted by the foundation in connection with the activities.	-,						,
	he foundation file Form 1120-POL for this year?					1c		X
	r the amount (if any) of tax on political expenditures (section 4955) imposed during the	vear:				15		
	On the foundation. > \$ 0 . (2) On foundation managers	-		0.		**,		· e
	r the reimbursement (if any) paid by the foundation during the year for political expendi			oundation				* ×
man	agers. ▶ \$0 .							· '
2 Has	the foundation engaged in any activities that have not previously been reported to the IF	RS?				2		X
If "Y	es," attach a detailed description of the activities.						,	 *.
3 Has	the foundation made any changes, not previously reported to the IRS, in its governing is	nstrume	nt, articles of	incorporation, or		-		
byla	ws, or other similar instruments? If "Yes," attach a conformed copy of the changes					3		X
	he foundation have unrelated business gross income of \$1,000 or more during the year	ιs				4a		X
	es," has it filed a tax return on Form 990-T for this year?				N/A	4b		
	there a liquidation, termination, dissolution, or substantial contraction during the year?	1				5_		X
	es," attach the statement required by General Instruction T							
	he requirements of section 508(e) (relating to sections 4941 through 4945) satisfied en	ıner:						
-	language in the governing instrument, or	ا ام <u>ب</u>	ama 411 : "	-44b- 4b	la			
	state legislation that effectively amends the governing instrument so that no mandator	y airecti	ons that conti	ct with the state	law		X	
	in in the governing instrument?	lata Daw		od Dowl VV		6	X	
7 010	he foundation have at least \$5,000 in assets at any time during the year? If "Yes," comp	nete Par	i ii, coi. (c), ai	io Pari XV		7		
8a Ento	r the states to which the foundation reports or with which it is registered. See instructio	ne 🕨						
M(JIIS		 -				
	e answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the A	ttorney i	General (or do	signate)				
	ch state as required by <i>General Instruction G</i> ? If "No," attach explanation	ictor ney (טט וטן ומיטווטים	orginal6)		8b		$\overline{\mathbf{x}}$
	e foundation claiming status as a private operating foundation within the meaning of se	ction 49	42(1)(3) or 49	42(1)(5) for caler	ndar	-00		
	2017 or the tax year beginning in 2017? See the instructions for Part XIV. If "Yes," com			())(3) 101 00101		9		- - 🗸
	any persons become substantial contributors during the tax year? If "Yes," attach a schedu			addresses		10		X
					F	orm 990)-PF	

1. A any time during the year, did the foundation, directly or indirectly, own a controlled entity within the misiming of section 5/2(b)(19)? If "Yes," attach scheduld, See instructions 2. Did the foundation make a definition to it of a donor advised fund over which the foundation or a designating density privileges? If "Yes," attach statement, See instructions 3. Did the foundation comply with the public inspection requirements for its annual returns and exemption applications? 12	Pa	art VII-A Statements Regarding Activities (continued)						
section 512(b)(13)? If Yes, attach schedule. See instructions 10 did to foundation make a distribution to a done advised fund over which the foundation or a disqualified person had advisory privileges? If Yes, attach statement. See instructions 10 did to foundation comply with the public inspection requirements for its annual returns and exemption application? Webste advises > N/A 11 The books are in care of > LYNN G INTRATER 12 Telephone no. > 913-38 5-9996 13 Section 4947(a)(f) none-warm) of the recently interest received for accurate during the year 15 Section 4947(a)(f) none-warm) of the recently interest received interest	-			Yes	No			
12 Did the foundation make a distribution to a donor advesed fund over which the foundation or a disqualified person had advisory privileges? 17 Lift Yes, Statish Statement. See instructions 18 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? 19 Websits address № IN/A 10 The books are in care of ▶ LYNN G INTRATER 10 The books are in care of ▶ LYNN G INTRATER 10 The books are in care of ▶ LYNN G INTRATER 10 The books are in care of ▶ LYNN G INTRATER 10 The books are in care of ▶ LYNN G INTRATER 10 The books are in care of ▶ LYNN G INTRATER 10 The books are in care of ▶ LYNN G INTRATER 10 The books are in care of ▶ LYNN G INTRATER 11 The books are in care of ▶ LYNN G INTRATER 12 The books are incared of the second of the care of the financial account in a foreign country? 12	11							
If Yes, attach statement, See instructions 13 X			11_		<u> </u>			
13	12							
Webste address \subseteq \text{N/A} \text{Title books are in care of \subseteq \text{LYNN G INTRATER} \text{Telephone no.} \subseteq 913-385-9996 \text{Located at } \subseteq 1040 6 \text{METCALF}, \text{ OVERLAND PARK, KS} \text{ 7pt-4 } \subseteq 6212 15 Section 4947(a)(1) one-sempt charitable trusts filing form 9997F in less of Form 1041 - check here and enter the amount of tax-event in interest receased or accrued during the year and enter the amount of tax-event interest receased or accrued during the year set and enter the amount of tax-event interest receased or accrued during the year set and enter the amount of tax-event interest receased or accrued during the year of the fundation form and fund requirements for FinCEN Form 114. If Yes, "enter the name of the foods form 15 the fundation have an interest in or a signature or other authority over a bank, section for fundation in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If Yes, "enter the name of the foods form 15 the Yes No 16 the Yes" column, unless an exception applies. 18 Fin Form 4720 if any item is checked in the Yes" column, unless an exception applies. 19 Expans the sale or exchange, or leasing of property with a disqualified person? 10 Engage in the sale or exchange, or leasing of property with a disqualified person? 11 Engage in the sale or exchange, or leasing of property with a disqualified person? 12 Fin Form 4720 if any item is checked in the Yes" column, unless an exception applies. 13 Finnish goods, services, of facilities to (or accept them from) a disqualified person? 14 Fin Form 4720 if any item is checked in the Pres' ded to accept them from) a disqualified person? 15 Fin Form 4720 if any item is checked in the Pres' ded to accept them from a disqualified person? 16 Fin Form 4720 in a given from the sale of the expenses of, a disqualified person? 17 Fin Fin touristic or use of a disqualified person? 18 Fin Form 4720 in a disqualified person (or index by): 19	40	,		v	<u> </u>			
14. The books are in care of ▶ LYNN G INTRAPER Telephone no. ▶ 91.3 - 38.5 - 99.96	13	·	13	Λ				
t. Coated at № 10406 METCALF, OVERLAND PARK, KS 2/P+4 ▶66212 Section 4947(a)(1) nonexempt charitable trusts fling Form 990-PF in level of Form 1041-check here and enter the amount of tax-exempt interest received or accrued during the year 16. At any time during calendary year 2017, did the foundation have an interest in or a signature or other authority over a bank, socurities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country. Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1 a Duming they say, did the foundation (cether directly or indirectly); (1) Engage in the sale or exchange, or leasing of property with a desqualified person? 2 yes No 2 yes 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? 4 Pay compensation to, or pay or reimburse the expenses of, a disqualified person? 5 Transfer any income or assets to a disqualified person (or make any of either available for the benefic or use of adexpullating 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.) 2 I larva answer is "Yes" to 1a(1)-(5), did any of the acts fail to qualify under the exceptions described in Regulations section 3544(1)-3 or in a current notice regarding disaster assistance, check here 5 Did the foundation engage in a prior year in any of the acts discribed in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2017? 1 Yes No No No No No No No N	14		5-9	996				
15. Section 49/1/a/1) necessarpt charitable trusts filing Form 990-PF in leu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year 16. All 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. 16. X 17. A 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. 16. Event VIII-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. 1a During the year, did the foundation (either directly or indirectly): 1b Engane in the sale or exchange, or leasing of property with a disqualified person? 1c Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? 1c Section (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? 1c Section (5) Transfer any momer or sests to a disqualified person or expert in the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available for the benefit or use of a disqualified person or make any of either available f	•							
and enter the amount of tax-exempt interest received or accured during the year 8 At any time during calendar year 2017, did the foundation have an interest in or a signature or other authority over a bank, scurries, or other interior all account in a foreign country? See the instructions for exceptions and filing requirements for FinCRN Form 114. If Yes, enter the name of the foreign country! Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1a During the year, did the foundation (either directly or indirectly); (1) Engage in the side or exchange, or leasing of property with a disqualited person? 2) Borrow mosely from, lend money b, or otherwise extend credit to (or accepit from) a disqualited person? 3) Furnish poods, services, or facilities to (or accepit them from) a disqualited person? 4) Pay compensation to, or pay or reimburse the expenses of, a disqualited person? 5) Transfer any income or assets to a disqualited person or make any of either available for the benefit or use of a designalited person of the foundation agreed for anxiety and the foundation agreed for a supplied for the plane for or the benefit or use of a designalited person of the foundation agreed for anxiety are greated as a supplied person? 6) Agree to pay money or property to a government office? (Exception, Check No' 1) If the foundation agreed in anxiety are greated in the expenses of the foundation on government acreated to a great of a supplied for the property of the foundation agreed for to anylory the official for a period after termination of government service, it terminating within 90 days.) 1) If any answer is "Yes to Ita(1)-(6), did any of the acts fall to qualify under the exceptions described in Regulations section 3442(1)/3) or 3942(1)/3 or 3942(1)/	15	•						
Securities, or other financial account in a foreign country? See the instructions for exceptions and filting requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country? File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 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? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (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? (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)? (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 fall to qualify under the exceptions described in Regulations section 34.491(d)-3 or in a current notice regarding disaster assistance, check here c bid the foundation engage in a prior year in any of the acts described in 1a, other than excepted acis, 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(a)(3) or 4942(b)(5): a Aft 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? 1 Taxes on failure to distribute income (section 4942) (does not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying se			N	/A				
See the instructions for exceptions and filting requirements for FinCEN Form 114. If Yes, "enter the name of the topic country." Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1a During the year, did the foundation (either directly or indirectly); (1) Engage in the sale or exchange, or leasing of property with a disqualified person? Yes No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) Yes No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes No (5) Transfer any income or assets to a disqualified person)? res No (6) Agree to pay money or property to a government official? (Exception, Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) Yes No b) If any answer is "Yes" to Ta(1)-(1)-(1), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(6)-3 or in a current notice regarding disaster assistance? See instructions Organizations relying on a current notice regarding disaster assistance, beach 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 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 No If Yes, If If Yes, I	16	At any time during calendar year 2017, did the foundation have an interest in or a signature or other authority over a bank,		Yes				
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): 1a During the year, did the foundation (either directly or indirectly): 1a During the year, did the foundation (either directly or indirectly): 1a During the year, did the foundation (either directly or indirectly): 1a During the year, did the foundation (either directly or indirectly): 1a During the year, did the foundation (either directly or indirectly): 1a During the year, did the foundation (either directly or indirectly): 1a During the year, did the foundation (either directly or indirectly): 1a During the year, did the foundation and year or discussing the person?		securities, or other financial account in a foreign country?	16		X			
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1 a During the year, do the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (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? (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)? (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 names re "Set" to 14(1-6), did any of the acts fail to quality under the exceptions described in Regulations section 53.4941(0)-3 or in a current notice regarding disaster assistance, check here 1 Did the foundation engage in a prior year in any of the acts described in 13, 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(1)(4) or 4942(1)(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 Is the years Is the year's large the section 4942(1) or 4942(1)(1) or 494		See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the						
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? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (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? (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of adequalified 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 30 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 (6)-3 or in 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 sldy of the tax year beginning in 2017? 1b Are there any years listed in 26 for which the foundation have any undistributed income (fines 6d and 6e, Part XIII) for tax year(s) beginning before 2017? 1c X 2b Are there any years listed in 2a for which the foundation have any undistributed income? (flapplying section 4942(a)(2) to all years listed, answer "No' and attach statement - see instructions.) 1 If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. 2b Are there any years listed in 2a for which the foundation have any undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No' and attach statement - see instructions.) 1 If the provisions of section 4942(a)(2) are	מ							
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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.) N/A 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 2017? 4b X	3	a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time						
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.) 1		during the year?						
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? 4a X b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2017? 4b X	1	· ·						
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4aXb Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?4aXb 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?4bX								
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2017? 4b X		· · · · · · · · · · · · · · · · · · ·	-		₩			
had not been removed from jeopardy before the first day of the tax year beginning in 2017?			4a		 ^			
	•		4h		x			
)-PF				

Form 990-PF (2017) GOLDBERG FAMILY FOUNDATION			<u>43-688461</u>	. 3	Page 6
Part VII-B Statements Regarding Activities for Which Fo	orm 4720 May Be Re	equired (continu	ıed)		
5a During the year, did the foundation pay or incur any amount to:				Yes	No
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	4945(e))?	☐ Ye	s X No		
(2) Influence the outcome of any specific public election (see section 4955); or	to carry on, directly or indirect	ctly,	i		1
any voter registration drive?		☐ Ye	s X No		
(3) Provide a grant to an individual for travel, study, or other similar purposes?		☐ Ye	s X No		
(4) Provide a grant to an organization other than a charitable, etc., organization	•				
4945(d)(4)(A)? See instructions		Ye	s X No		
(5) Provide for any purpose other than religious, charitable, scientific, literary,	or educational nurnoses, or fo				
the prevention of cruelty to children or animals?	or outdourners perposed or to		s X No		
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify und	er the excentions described in	· · · · · · · · · · · · · · · · · · ·			
section 53.4945 or in a current notice regarding disaster assistance? See instru		. r rogalations	N/A s	ib	į .
Organizations relying on a current notice regarding disaster assistance, check h					
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption for		nad			
expenditure responsibility for the grant?		/A	s No		
	14	/22 16	* 140		
If "Yes," attach the statement required by Regulations section 53.4945-5(d).			•		ł
6a Did the foundation, during the year, receive any funds, directly or indirectly, to p	ay premiums on		s X No	-	
a personal benefit contract?	h	Ye		_	
b Did the foundation, during the year, pay premiums, directly or indirectly, on a pr	ersonal benefit contract?		<u> -</u> 5	Sb	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 st		Ye	s X No		├ ──
b If "Yes," did the foundation receive any proceeds or have any net income attribu			N/A 7	7b	Ь
Part VIII Information About Officers, Directors, Truste Paid Employees, and Contractors	es, Foundation Man	agers, Highly			
List all officers, directors, trustees, and foundation managers and the	oir componention				
Elst all officers, directors, a disteres, and foundation managers and the	•	(c) Compensation	(d) Contributions to	(a) Evr	20000
(a) Name and address	(b) Title, and average hours per week devoted	(If not paid,	(d) Contributions to employee benefit plans and deferred	(e) Exp account	, other
	to position	`enter'-0-)'	compensation	allowa	nces
	TRUSTEE				
4805 W 112TH TERR					_
LEAWOOD, KS 66211	0.00	0.	0.		<u>0.</u>
	ADVISORY COMM	LTTEE MEMI	BER		
4901 W 133RD ST #303		_			_
LEAWOOD, KS 66209	0.00	0.	0.		0.
	ADVISORY COMM	ITTEE MEMI	BER		
12409 HIGH DRIVE					
LEAWOOD, KS 66202	0.00	0.	0.		0.
ROBERT A GOLDBERG	ADVISORY COMM	ITTEE MEMI	BER		
3839 MCKINNEY AVE, STE 155-211					
DALLAS, TX 75204	0.00	0.	0.		0.
2 Compensation of five highest-paid employees (other than those incl	uded on line 1). If none, e	enter "NONE."			
(-) Name and address of an ab amplayed hard more than \$50,000	(b) Title, and average	(-) Companyation	(d) Contributions to employee benefit plans	(e) Exp account allowa	pense
(a) Name and address of each employee paid more than \$50,000	hours per week devoted to position	(c) Compensation	and deterred compensation	allowa	ances
NONE	· · · · · · · · · · · · · · · · · · ·		·		
		1			
	.,				
			-		
Total number of other ampleyees paid over \$50,000	<u> </u>	<u> </u>		_	0
Total number of other employees paid over \$50,000			<u> </u>		

Form 990-PF (2017) GOLDBERG FAMILY FOUNDATION	43-	5884613 Page 7
Part VIII Information About Officers, Directors, Trustees, Foundat Paid Employees, and Contractors (continued)		
3 Five highest-paid independent contractors for professional services. If none, enter	"NONE."	
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
	7	
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 statist		Expenses
number of organizations and other beneficiaries served, conferences convened, research papers produ	uced, etc.	LXPENSES
1 N/A		
		0.
2		
3		
		
4		
-		
Part IX-B Summary of Program-Related Investments		
Describe the two largest program-related investments made by the foundation during the tax year on l	ines 1 and 2	Amount
1 N/A	inics 7 and 2.	Amount
1 N/A		
2		
All other program-related investments. See instructions.		
3		
*		
	-	
Total Add lines 1 through 3		0.

P	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations	dation	s, see instructions)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a		1a	2,706,224.
b	Average of monthly cash balances	1b	233,944.
	Fair market value of all other assets	1c	849.
d	Total (add lines 1a, b, and c)	1d	2,941,017.
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation) 1e 0.		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	2,941,017.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	44,115.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,896,902.
6	Minimum investment return. Enter 5% of line 5	6	144,845.
P	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations an	d certai	n
	foreign organizations, check here 🕨 🔛 and do not complete this part.)		
1	Minimum investment return from Part X, line 6	1	144,845.
2a	Tax on investment income for 2017 from Part VI, line 5		
b	Income tax for 2017. (This does not include the tax from Part VI.)	-	
C	Add lines 2a and 2b	2c	1,360.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	143,485.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	143,485.
6	Deduction from distributable amount (see instructions)	6	0.
7_	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	143,485.
_	art XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		160 110
a		1a	162,119.
	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:	-	
a		3a	
b	,	3b	162 110
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	4	162,119.
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	5	162 110
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	162,119.
	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation of 4940(e) reduction of tax in those years.	ualities	tor the section

Form **990-PF** (2017)

Part XIII Undistributed Income (see instructions)

(a) Corpus Years and 16 (b) (c) (d) (d) (2016 2016 2017 Corpus Years and 16 (c) (d) (d) (d) (d) (d) (d) (d) (d) (d) (d						
143,485.2	_					
2. Understands the more of 2017 and 10 per or years. 3. Excess distributions carryover, if any, to 2017. a From 2012						142 495
Excess distribution course proventing and setting an						143,403.
3 Excess distributions carryoner, if any, to 2017. a From 2012 1 0.1, 8.30. b From 2013 8.4, 9.52. e From 2014 9.0, 6.37. d From 2016 9.6, 7.13. e From 2016 1.05, 560. That of these sat through e 4 Qualifung distributions for 2017 from Part XII, line 4; the 1 1.62, 1.19. a Applied to 2016, but not more than that 2a b Applied to 2016, but not more than that 2a b Applied to 2016, but not more than that 2a b Applied to 2016 flow in order of prory gears (Electrion required –see instructions) c Treated as distributions of order of prory gears (Electrion required –see instructions) c Treated as distributions or of corpus S Energian establishmen order of prory gears (Electrion required –see instructions) c 4 Applied to 2017 distributible amount a Remaring amount distributed out of corpus 5 Energian establishmen inclination is an examinate 6 Extent the net total of each column as indicated below. Corpus Additions 4, st., and 4 schemant has a horizon of distributibuted incomes. Subtract line 6 from line 2b. C Enter the emount of priory years' an anotice of distribution of the column as indicated below. Corpus Additional 4, st., and 4 schemant has a line 4 and 5 from line 6b. Taxabile amount – see instructions c Undistributed income for 2018 Subtract line 4 and 5 from line 1. This armount must be distributed in 2018 7 Amounts brailed as distributions curryower from 2012 or orgue to assistly requirements improsed by section 170(b) (1)(f) or 492(g/4) (Electron may be required -see instructions) 8 Excess from 2014 9.0, 6.37. 2 Excess from 2014 9.0, 6.37. 2 Excess from 2014 9.0, 6.37. 2 Excess from 2015 9.0, 7.71.3. 4 Excess from 2016 9.0, 7.71.3. 4 Excess from 2016 9.0, 7.71.3.		·			^	
3 Excess distributions carryover, if any, to 2017; a From 2012		, ,			0.	
3 Excess distributions curryover, (1 any, 10 2017; a From 2012	ים	otal for prior years.		^		
From 2012	2 F	excess distributions carryover if any to 2017:		U •		
From 2013 9.4 , 9.5.2						
From 2014						
From 2015 96 / 713	_					
From 2016	_	From 2015 96 713				
1 Total of lines a through e 4 Qualifying distributions for 2017 from Part XII, Inc. ** № \$ 1.52 , 119 . a Replied to 2016, but not more than line 2a b Applied to Mostributed income of prior years (Election required - see instructions) c Treated as distributions out of corpus (Election required - see instructions) d Applied to 2017 distributable amount elemaning amount distributed out of corpus 5 Ereas centrulutions earryow replied to 1919 (if an amount agreement in eather (she same amount must be shown in column (a)) 6 Eather the ent total of each column as indicated below. 3 Prior years' undistributed income of 3 Prior years' undistributed income (she same amount in the schon 4942(a) tax has been previously assessed 4 Subtract line 6 from line 8b, Taxable amount - see instructions c Undistributed income for 2016. Subtract line 4 from line 2.2 Taxable amount - see instruct 1 Undestributed income for 2017. Subtract line 4 b from line 8b, Taxable amount - see instructions c Undistributed income for 2017. Subtract lines 4 d and 5 from line 1. This amount must be distributed income for 2017. Subtract lines 4 d and 5 from line 1. This amount must be distributed income for 2017. Subtract lines 4 d and 5 from line 1. This amount must be distributed income for 2017. Subtract lines 4 d and 5 from line 6b, Taxable amount - see instructions 0 . 1 Undistributed income for 2016. Subtract lines 4 a from line 2 a from line 6a 0 Analysis of line 9: 1 Excess from 2016	-					
4. Qualifying distributions for 2017 from Part XII, line 4: № \$ 16.2,119. a Applied to 2016, but not more than line 2a			179 692			
Part XII, Ine 4: ► ► ► 162, 119. a Applied to 2016, but not more than line 2e by Applied to undistributed income of pror years (Election required - see instructions) c Treated as distributions out of corpus (Election required - see instructions) d Applied to 2017 distributable amount element and the subtract of corpus of an environment distributed out of corpus 5 Excess deshabitions corpuser general to 2017 of an environment of the same amount mast see show in column (a). 18,634. 18,634. 18,634. 18,634. 18,634. 18,634. 18,634. 19,634. 19,634. 10,604.		-	413,032.			
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(Election required - see instructions) d Applied to 2017 distributable amount e Remaining amount distributed out of corpus 5						
d Applied to 2017 distributable amount e Remaning amount distributed out of corpus Excess destributions carryover appears in column (a). The same amount must be deven in column (a). The same amount must be deven in column (a). The same amount must be deven in column (a). The same amount must be deven in column (a). The same amount must be deven in column (a). The same amount in the same amount in distributed deven as indicated below: a Corpus Addines 81, 4c, and 4e Subtract line 5. Prior years' undistributed income. Subtract line 4b from line 2b. Ethier the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed. d Subtract line 6c from line 6b. Taxable amount - see instructions. e Undistributed income for 2016. Subtract line 4a from line 2a. Taxable amount - see instructions. I Undistributed income for 2015. Subtract lines 4d and 5 from line 1. This amount must be distributions corrower than 2018. A mounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(a)(3) (Election may be required - see instructions). 8 Excess distributions carryover from 2012. not applied on line 5 or line 7. 9 Excess distributions carryover to 2018. Subtract lines 5 and 8 from line 6a. O Analysis of line 9: a Excess from 2013 84,952. b Excess from 2014 90,637. c Enter the amount of prior years' undistributed in 2018. Subtract line 8 from 2014 96,737. c Enter the amount of prior years' undistributed in 2018. Subtract line 8 from 2016 96,713. c Excess from 2016 105,560.		•	٥			
e Remaining amount distributed out of corpus 5 Excess distributions carryover inglied to 2017 (if an amount appears in oclaimin (b), the same amount must be alwarn in Cambridge as in California (b). The same amount of the same amount (a) is a corpus and times 3f.e., and 4e. Subtract line 5 b Prior years' undistributed income. Subtract line 5 b Prior years' undistributed income. Subtract line 4 b from line 2b. c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed d Subtract line 6c from line 6b. Taxable amount - see instructions e Undistributed income for 2016. Subtract line 4 af rom line 2a. Taxable amount - see instructions e Undistributed income for 2017. Subtract line 4 af rom line 2. Taxable amount - see instructions e Undistributed income for 2017. Subtract lines 4 d and 5 from line 1. This amount must be distributed in 2018 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(f)(f)(f) or 494(g)(3) (election may be required - see instructions) 8 Excess distributions carryover from 2012 not applied on line 5 or line 7 9 Excess distributions carryover from 2018. Subtract lines 7 and 8 from line 6a. 396 , 496 . 396 , 496 . 396 , 496 . 396 , 496 . 396 , 496 . 396 , 496 . 397		•	0.	*		1/2 /05
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(if an amount appears in column (if), the same amount must be shown in column (ii). Effect the net total of each column as indicated below: 3 cropus Add mess 3f.4c, and 4e Subtract line 5 Prior years' undistributed income. Subtract line 4b from line 2b Effect the amount of prory years' undistributed income for which a notice of deflicency has been issued, or on which the section 94/2(a) tax has been previously assessed 3 Subtract line 6b from line 6b. Taxable amount - see instructions Lindistributed income for 2016. Subtract line 4a from line 2a. Taxable amount - see instructions Lindistributed income for 2017. Subtract lines 4d and 5 from line 1. This armount must be distributed in 2018 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(f) or 4942(a)(3) (Election may be required - see instructions) Excess distributions carryover from 2012 not applied on line 5 or line 7 Excess from 2013 Excess from 2014 Analysis of line 9: a Excess from 2014 D Analysis of line 9: a Excess from 2014 D Analysis of line 9: a Excess from 2014 D Analysis of line 9: a Excess from 2015 Excess from 2016	_	·		` ` ` ` ` ` ` ` ` ` ` ` ` ` ` ` ` ` `	*	<u> </u>
6 Enter the net total of each column as indicated below: 3 Corpus Addines 3t, 4s, and 4e Subtract line 5 b Prior years' undistributed income. Subtract line 4b from line 2b c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 494(2a) lax has been previously assessed d Subtract line 6c from line 6b. Taxable amount - see instructions e Undistributed income for 201f. Subtract line 4a from line 2a. Taxable amount - see instructions e Undistributed in come for 201f. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2018 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(f) or 4942(g)(3) (Election may be required - see instructions) 8 Excess distributions carryover from 2012 not applied on line 5 or line 7 9 Excess from 2013 9 Excess firm 2013 8 4 4, 95 2. b Excess from 2013 8 4 9 5, 7 13. d Excess from 2014 9 0, 63 7. c Excess from 2015 9 Excess from 2014 9 0, 63 7. c Excess from 2015 10 5, 56 0.	(If an amount appears in column (d), the same amount	\$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	81.		
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Initial Content	a	Corpus Add lines 3f, 4c, and 4e Subtract line 5	498,326.		· *	Mr. Swiel
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed d Subtract line 6c from line 6b. Taxable amount - see instructions e Undistributed income for 2016. Subtract line 4a from line 2a. Taxable amount - see instructions e Undistributed income for 2017. Subtract lines 4d and 5 from line 1. This armount must be distributed in 2018 7. Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions) 8. Excess distributions carryover from 2012 not applied on line 5 or line 7 9. Excess distributions carryover from 2018. Subtract lines 9. at 8 4 , 952. because from 2014 c Excess from 2014 d Excess from 2016 d Excess from 2016 d Excess from 2016 10. 10. 10. 10. 10. 10. 10. 10. 10. 10.	ЬF	Prior years' undistributed income. Subtract	\$\display \display \d		78 - A. (A.)	7 W 11 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
undstributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed d Subtract line 6c from line 6b. Taxable amount - see instructions e Undistributed income for 2016. Subtract line 4a from line 2a. Taxable amount - see instructions e Undistributed income for 2017. Subtract line 4a from line 2a. Taxable amount - see instructions thin 4d and 5 from line 1. This amount must be distributed in 2018 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) Excess distributions carryover from 2012 not applied on line 5 or line 7 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a Analysis of line 9: a Excess from 2013 Excess from 2014 Excess from 2015 GEXESS from 2015 9 6, 7113. d Excess from 2016 Loss, 560.	í	ine 4b from line 2b	Ä.	0.	17 L. A. S.	* ; `
amount - see instructions e Undistributed income for 2016. Subtract line 4a from line 2a. Taxable amount - see instr. f Undistributed income for 2017. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2018 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(f) or 4942(g)(3) (Election may be required - see instructions) 8 Excess distributions carryover from 2012 not applied on line 5 or line 7 9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a 0 Analysis of line 9: a Excess from 2013 b Excess from 2014 c Excess from 2016 1 0 5 , 560.	t t	undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously		0.		
amount - see instructions e Undistributed income for 2016. Subtract line 4a from line 2a. Taxable amount - see instr. f Undistributed income for 2017. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2018 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions) 8 Excess distributions carryover from 2012 not applied on line 5 or line 7 9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a O . 101,830. 101,830. 101,830.	d S	Subtract line 6c from line 6b. Taxable			*	
4a from line 2a. Taxable amount - see instr. 1 Undistributed income for 2017. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2018 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(f) or 4942(g)(3) (Election may be required - see instructions) 8 Excess distributions carryover from 2012 not applied on line 5 or line 7 9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a 0 Analysis of line 9: a Excess from 2013 b Excess from 2014 c Excess from 2015 d Excess from 2016 1 0 5 , 560 .	ā	amount - see instructions		0.	*^	1
f Undistributed income for 2017. Subtract lines 4d and 5 from line 1. This armount must be distributed in 2018 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions) 8 Excess distributions carryover from 2012 not applied on line 5 or line 7 9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a 0 Analysis of line 9: a Excess from 2013	еl	Undistributed income for 2016. Subtract line				
lines 4d and 5 from line 1. This amount must be distributed in 2018 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions) 8 Excess distributions carryover from 2012 not applied on line 5 or line 7 9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9: a Excess from 2013 b Excess from 2014 c Excess from 2015 d Excess from 2016 10 5 , 560.	4	fa from line 2a. Taxable amount - see instr.			0.	
be distributed in 2018 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions) 8 Excess distributions carryover from 2012 not applied on line 5 or line 7 9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9: a Excess from 2013 84,952. b Excess from 2014 90,637. c Excess from 2015 96,713. d Excess from 2016 105,560.	fl	Undistributed income for 2017, Subtract				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions) 8 Excess distributions carryover from 2012 not applied on line 5 or line 7 9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9: a Excess from 2013 b Excess from 2014 c Excess from 2015 d Excess from 2016 10 5 , 560 .	i	ines 4d and 5 from line 1. This armount must				
corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions) 8 Excess distributions carryover from 2012 not applied on line 5 or line 7 9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a 0 Analysis of line 9: a Excess from 2013 b Excess from 2014 c Excess from 2015 d Excess from 2016 105,560.	t	pe distributed in 2018				0.
section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions) 8 Excess distributions carryover from 2012 not applied on line 5 or line 7 9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9: a Excess from 2013 b Excess from 2014 c Excess from 2015 d Excess from 2016 105,560.	7 /	Amounts treated as distributions out of				
may be required - see instructions) 8	(corpus to satisfy requirements imposed by				
8 Excess distributions carryover from 2012 not applied on line 5 or line 7 9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9: a Excess from 2013 b Excess from 2014 c Excess from 2015 d Excess from 2016 105,560.	5	section 170(b)(1)(F) or 4942(g)(3) (Election				
not applied on line 5 or line 7	r	may be required - see instructions)	0.	i		
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a 0 Analysis of line 9: a Excess from 2013 b Excess from 2014 c Excess from 2015 d Excess from 2016 105,560.	8 E	Excess distributions carryover from 2012				
Subtract lines 7 and 8 from line 6a 396,496. 10 Analysis of line 9: a Excess from 2013 84,952. b Excess from 2014 90,637. c Excess from 2015 96,713. d Excess from 2016 105,560.	ſ	not applied on line 5 or line 7	101,830.			
0 Analysis of line 9: a Excess from 2013 b Excess from 2014 c Excess from 2015 d Excess from 2016 105,560.	9 E	Excess distributions carryover to 2018.				
a Excess from 2013 b Excess from 2014 c Excess from 2015 d Excess from 2016 8 4 , 952. 9 0 , 637. 9 6 , 713. 105 , 560.	9	Subtract lines 7 and 8 from line 6a	396,496.			
b Excess from 2014 90,637. c Excess from 2015 96,713. d Excess from 2016 105,560.	10 /	Analysis of line 9:				
c Excess from 2015 d Excess from 2016 105,560.	a E					
d Excess from 2016 105,560.	b E					
	c E					
	d E					
	e E	Excess from 2017 18,634.				

Part XIV Private Operating For	G FAMILY FOU		A =::==== ()	43-68	84613 Page 10
			A, question 9)	N/A	
1 a If the foundation has received a ruling of		· · · · · · ·			,
foundation, and the ruling is effective for	•	•	▶ ∟		
b Check box to indicate whether the found		g foundation described in		4942(j)(3) or49	142(j)(5)
2 a Enter the lesser of the adjusted met	Tax year	(h) 2010	Prior 3 years	(4) 0014	(a) Takal
income from Part I or the minimum	(a) 2017	(b) 2016	(c) 2015	(d) 2014	(e) Total
investment return from Part X for					
each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII,					
line 4 for each year listed					
d Amounts included in line 2c not					
used directly for active conduct of			/		
exempt activities _			/		
e Qualifying distributions made directly	1				
for active conduct of exempt activities.					
Subtract line 2d from line 2c			/		
3 Complete 3a, b, or c for the			/		
alternative test relied upon: a "Assets" alternative test - enter:					
(1) Value of all assets		/			
(2) Value of assets qualifying					
under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter		1			
2/3 of minimum investment return shown in Part X, line 6 for each year					
listed]				
c "Support" alternative test - enter:					
(1) Total support other than gross					
investment income (interest,					
dividends, rents, payments on					
securities loans (section					
512(a)(5)), or royalties)	//				
(2) Support from general public and 5 or more exempt					
organizations as provided in					
section 4942(j)(3)(B)(III)				 	
(3) Largest amount of support from					
an exempt organization	/			•	
(4) Gross investment income Part XV Supplementary Info	rmation /Complet	te this part only if	the foundation	2 had \$5 000 or mor	o in accete
at any time during the			tile loulidation	i nau \$5,000 or mor	e iii assets
1 Information Regarding Foundatio	-		b 4		
a List any managers of the foundation where year (but only if they have contributed in			ibutions received by tr	ne roundation before the clos	e of any tax
	1016 than 40,000). (Oce 36	3011011 307 (4)(2)-)			
NONE	400/				
b List any managers of the foundation who other entity) of which the foundation has			or an equally large por	tion of the ownership of a pa	irtnership or
• •	sa 1070 or greater interes	·La			
NONE			 		
2 Information Regarding Corntributi					
Check here X if the foundation of					ests for funds. If
the foundation makes gifts, grants, etc.,		· · · · · · · · · · · · · · · · · · ·			
a The name, address, and telephone number	ber or email address of the	e person to whom applica	ations should be addre	essed:	
b The form in which applications should b	e submitted and informate	ion and materials they sh	ould include:		
c Any submission deadlines:					
• raty auditioaidii dedullilea.					
d Any restrictions or limitations on awards	s, such as by geographica	l areas, charitable fields,	kınds of institutions, o	r other factors:	

			····	
3 Grants and Contributions Paid During the Yea	ar or Approved for Future P	ayment		
Recipient	If recipient is an individual,	Foundation	Purnose of grant or	
Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
, i				
SEE ATTACHMENT C		7	GENERAL FUND	
ATTIONIEM C		ŗ		150,878.
	•			
:				
Total	<u>r</u>	т	<u> </u>	150,878.
b Approved for future paymen t				
NONE				
				
Total	<u> </u>	•	▶ 2b	• 0

Form 990-PF (2017)

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated	business income		d by section 512, 513, or 514	(e)
•	(a) Business	(b)	(c) Exclu-	(d)	Related or exempt
1 Program service revenue:	code	Amount	sion	Amount	function income
a					
b	_				
С	_				
d		_ -			<u> </u>
e	1 1				
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	168.	
4 Dividends and interest from securities			14	80,750.	
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			16		
7 Other investment income			15		
8 Gain or (loss) from sales of assets other than inventory			18	<12,935.>	
9 Net income or (loss) from special events			1 - 1	122/22007	
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:		•			
a NON TAXABLE INCOME			14	74.	
b	_				
С					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)	*\$2	C	. * /	68,057.	0.
13 Total. Add line 12, columns (b), (d), and (e)				13	68,057.
(See worksheet in line 13 instructions to verify calculations.)				

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes).				

Form **990-PF** (2017)

Pa	rt XVII	Information Re Exempt Organ		nd Transactions and	Relationships With Noncharita	able		
1	Did the o	rganization directly or indi	rectly engage in any of the following	g with any other organization	described in section 501(c)	Y	es f	No
•			izations) or in section 527, relating				\top	
а	•	–	ation to a noncharitable exempt org	- · · · · · · · · · · · · · · · · · · ·				
	(1) Cash					1a(1)		X_
	(2) Othe					1a(2)		X
ь	• •	nsactions:					\top	_
	(1) Sale:	s of assets to a noncharital	ble exempt organization			16(1)		X
			ncharitable exempt organization			1b(2)		X
	(3) Rent	al of facilities, equipment,	or other assets			1b(3)	\neg	X
	(4) Rein	nbursement arrangements				1b(4)		X
	(5) Loar	ns or Ioan guarantees				1b(5)		X
	(6) Perfe	ormance of services or me	mbership or fundraising solicitation	ns		1b(6)		X
C	Sharing o	of facilities, equipment, ma	iling lists, other assets, or paid emp	ployees		1c		<u>X</u>
d	If the ans	swer to any of the above is	"Yes," complete the following sche-	dule. Column (b) should alwa	ays show the fair market value of the goods, ot	her assets	,	
				d less than fair market value	in any transaction or sharing arrangement, she	ow in		
	column (other assets, or services received.					
<u>(a)</u> ∟	ine no	(b) Amount involved	(c) Name of noncharitable	exempt organization	(d) Description of transfers, transactions, and sh	aring arrang	ements	
			N/A					
			<u> </u>		_			
		··· · · · · · · · · · · · · · · · · ·						—
								—
	_+							—
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	-+	· · · · · · · · · · · · · · · · · · ·						
				··· <u></u> .				_
								_
2a	is the for	undation directly or indirec	tly affiliated with, or related to, one	or more tax-exempt organiza	ations described			
			n 501(c)(3)) or in section 527?	. •		Yes	X	No
ъ	If "Yes," o	complete the following sch	edule.					
		(a) Name of Org	ganization	(b) Type of organization	(c) Description of relationsh	ıp		
		N/A						
		 						
	Llmala		that I have examined this return, including					
Si			nplete Declaration of preparer (other than		May	the IRS disc n with the pa		,
He		& Dynn Ji	Mide Mutter	1V 9/12/1A	shov	vn below? S	ee instr	
		nature of officer or trustee	1 4 a 9 7 1 1 1 3 4)	Date		Yes		No
	J	Print/Type preparer's na		Date	Title Check If PTIN			
		The type property 3 the		M \	self- employed			
Pa	id	ANN M. SWA	RTS // //m	11) Mus. t.	$9/\rightarrow 1.$	4359	91	
	eparer	Firm's name ► CB I		· · · · · · · · · · · · · · · · · · ·	Firm's EIN ► 34-18			—
	e Only		,		I IIIII 2 FIIA > 2 ± 10		-	
	•		0 WEST 47TH STR	EET, SUITE 11	00			
			NSAS CITY, MO 6		Phone no. 816-94	5-55	00	
						rm 990 -		 017\

FORM 990-PF INTERE	ST ON SAVINO	GS AND	TEMPOR!	ARY	CASH	INV	ESTMENTS	ST	ATEMENT 1	
SOURCE			(A) REVENUE PER BOOKS				(B) NVESTMENT NCOME		(C) ADJUSTED NET INCOME	
CENTRAL BANK OF THE MIDWEST			168.				168.		<u>_</u>	
TOTAL TO PART I, LINE 3			168.		168.					
FORM 990-PF	DIVIDENDS	AND IN	ITEREST	FRO	M SEC	URI	TIES	ST	ATEMENT 2	
SOURCE	GROSS AMOUNT	CAPI GAI DIVII	:NS		(A) VENUE BOOK		(B) NET INVES MENT INCO		(C) ADJUSTED NET INCOME	
CHARLES SCHWAB - ACCRUED INTEREST PURCHASED CHARLES SCHWAB -	<280.>	·	0.		<28	0.>	<7	2.>		
DIVIDENDS CHARLES SCHWAB - INTEREST	59,943. 19,671.		2. 0.		59,94 19,67		59,94 18,3			
OPPENHEIMER - DIVIDENDS	3,980.	2	2,562.		1,41		1,4:			
TO PART I, LINE 4	83,314.		2,564.		80,75	50.	79,6	45.		
FORM 990-PF		ОТН	ER INCO	ME				ST	PATEMENT 3	
DESCRIPTION			RE'	(A) VENU BOO			(B) T INVEST		(C) ADJUSTED NET INCOME	
NON TAXABLE INCOME					74	•		0.		
TOTAL TO FORM 990-PF, PART I, LINE 11			<u>-</u> L		74	- —		— - 0.		

FORM 990-PF	ACCOUNTI	NG FEES	STATEMENT 4		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
CBIZ - ACCOUNTING FEES	8,269.	4,135.		4,134.	
TO FORM 990-PF, PG 1, LN 16B	8,269.	4,135.		4,134.	
	1				
FORM 990-PF C	THER PROFES	SIONAL FEES	STATEMENT 5		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
CHARLES SCHWAB INV MGMT FEES OPPENHEIMER INV MGMT FEES	13,389. 824.			6,695. 412.	
TO FORM 990-PF, PG 1, LN 16C	14,213.	7,106.		7,107.	
FORM 990-PF	TAX	ES	s	TATEMENT 6	
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FOREIGN TAX EXCISE TAX ESTIMATED EXCISE TAX	241. 400. 305.	0.		0.	
TO FORM 990-PF, PG 1, LN 18	946.			0.	

FORM 990-PF	OTHER E	XPENSES	STATEMENT 7		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
ADVANTAGE ADVISORS PRIVATE EQ CHARLES SCHWAB - INVESTMENT	331.	331.		0.	
CHARLES SCHWAB - INVESTMENT EXPENSES	24.	24.		0.	
TO FORM 990-PF, PG 1, LN 23	355.	355.		0.	

FORM 990-PF OTH	HER DECREASES	IN NET	ASSETS	OR	FUND	BALANCES	STATEMENT	8
DESCRIPTION							AMOUNT	
PRIOR YEAR ADJUST	MENT - REDUCT	ON OF B	BASIS ON	N PA	ARTNE	RSHIP	24,0	90.
TOTAL TO FORM 990-	-PF, PART III,	LINE 5	5				24,0	90.
FORM 990-PF		CORPOR	RATE STO	ЭСК			STATEMENT	9
DESCRIPTION					В	OOK VALUE	FAIR MARKE' VALUE	Т
COMMON STOCKS - AT	TTACHMENT A					1,333,668.	2,054,1	97.
TOTAL TO FORM 990-	-PF, PART II,	LINE 10)B			1,333,668.	2,054,1	97.
FORM 990-PF		CORPOR	RATE BOI	NDS			STATEMENT	10
DESCRIPTION					В	OOK VALUE	FAIR MARKE	T
FIXED INCOME - ATT	TACHMENT A					704,392.	680,3	85.
TOTAL TO FORM 990-	-PF. PART II.	LINE 10	oc			704,392.	680,3	85.

FORM 990-PF OTHE	R INVESTMENTS	STATEMENT 11	
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
MUTUAL FUNDS - ATTACHMENT B	COST	80,782.	87,297.
TOTAL TO FORM 990-PF, PART II, LINE	2 13	80,782.	87,297.

FORM 990-PF	OTHER ASSETS	STATEMENT 12	
DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
ADVANTAGE ADVISERS PRIVATE EQ	790.	0.	0.
ADVANTAGE ADVISERS PRIVATE EQ - OUTSIDE BASIS	28,241.	0.	0.
TO FORM 990-PF, PART II, LINE 15	.29,031.	0.	0.