Porm 990-PF
Department of the Treasury
Internal Revenue Service

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

For calendar year 2017 or tax year beginning , and ending A Employer identification number Name of foundation 16-128 THE GERALD H. WESTBY, JR. FOUNDATION Number and street (or P O box number if mail is not delivered to street address) Room/suite B Telephone number 401 S. BOSTON AVE. 220 918-743-8321 City or town, state or province, country, and ZIP or foreign postal code C If exemption application is pending, check here TULSA, OK 74103 G Check all that apply: Initial return Initial return of a former public charity D 1 Foreign organizations, check here Final return Amended return 2. Foreign organizations meeting the 85% test, check here and attach computation Address change Name change X Section 501(c)(3) exempt private foundation H Check type of organization: E If private foundation status was terminated Section 4947(a)(1) nonexempt charitable trust _____ Other taxable private foundation under section 507(b)(1)(A), check here I Fair market value of all assets at end of year | J | Accounting method: X Cash Accrual If the foundation is in a 60-month termination Other (specify) (from Part II, col. (c), line 16) under section 507(b)(1)(B), check here 968, 767. (Part I, column (d) must be on cash basis.) ▶\$ Part I Analysis of Revenue and Expenses (d) Disbursements for charitable purposes (cash basis only) (b) Net investment (c) Adjusted net (a) Revenue and (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a)) expenses per books income ıncome N/A Contributions, gifts, grants, etc., received Check X If the foundation is not required to attach Sch B Interest on savings and temporary cash investments 953 953 STATEMENT 19,304. 19,304. STATEMENT Dividends and interest from securities 5a Gross rents b Net rental income or (loss) 41,700 6a Net gain or (loss) from sale of assets not on line 10 b Gross sales price for all assets on line 6a 957,322. 41,700 7 Capital gain net income (from Part IV, Jine 2 8 Net short-term capital gain Income modifications 10a Gross sales less returns and allowances b Less Cost of goods sold c Gross profit or (loss) OGDE 11 Other income 61,957 61,957. 12 Total Add lines 1 through 11 4,000 4,000 0. 13 Compensation of officers, directors, trustees, etc. 14 Other employee salaries and wages 15 Pension plans, employee benefits 1,410 1,410. 0. STMT 16a Legal fees 9,061. 9,061 STMT 0. **b** Accounting fees 6,766. 6,766. STMT c Other professional fees 0. 17 Interest 5,113 18 Taxes STMT 6 5.113 0. 19 Depreciation and depletion 20 Occupancy 395 395 0. 21 Travel, conferences, and meetings 22 Printing and publications 685 685 STMT 7 0. 23 Other expenses 24 Total operating and administrative 27,430 27,430 expenses Add lines 13 through 23 42,750 42,750. 25 Contributions, gifts, grants paid 26 Total expenses and disbursements 27,430 70,180. 42,750. Add lines 24 and 25 27 Subtract line 26 from line 12: <8,223. a Excess of revenue over expenses and disbursements 34,527 b Net investment income (if negative, enter -0-) N/A c Adjusted net income (if negative, enter -0-)

Form **990-PF** (2017)

THE GERALD	H. WESTBI, OK	Pographia of year	F-4 (0000 raye 2
Part II Balance Sheets Attached schedules column should be the	and amounts in the description or end-of-year amounts only	Beginning of year (a) Book Value	End of yea	r (c) Fair Market Value
1 Cash - non-interest-bearing	·	(w) DOOK VAIDO	(a) cook value	Wy an market value
2 Savings and temporary cash investments	<u> </u>	67,091.	46,855.	46,855.
3 Accounts receivable ►	200.	<u> </u>	20,000.	30,000.
Less: allowance for doubtful accounts		165.	200.	200.
4 Pledges receivable ►				
Less: allowance for doubtful accounts				
5 Grants receivable				
6 Receivables due from officers, directors, tro	ustees, and other			
disqualified persons				
7 Other notes and loans receivable	·	1		
Less: allowance for doubtful accounts -				
8 Inventories for sale or use	_			
Inventories for sale or use Prepaid expenses and deferred charges Prepaid expenses and state government of the same stat				
10a investments - 0.5. and state government o				
b Investments - corporate stock	STMT 8	651,972.	751,844.	882,244.
c Investments - corporate bonds	STMT 9	116,072.	28,178.	39,468.
11 Investments - land, buildings, and equipment basis				
Less accumulated depreciation	·			
12 Investments - mortgage loans13 Investments - other	}			
14 Land, buildings, and equipment: basis	-			
Less accumulated depreciation	•			
15 Other assets (describe ►				
16 Total assets (to be completed by all filers -	see the			
instructions. Also, see page 1, item I)		835,300.	827,077.	968,767.
17 Accounts payable and accrued expenses				
18 Grants payable				
g 19 Deferred revenue				
20 Loans from officers, directors, trustees, and other	disqualified persons			
20 Loans from officers, directors, trustees, and other of 21 Mortgages and other notes payable	_			
22 Other liabilities (describe >)			
	1			
23 Total liabilities (add lines 17 through 22)		0.	0.	
Foundations that follow SFAS 117, check			1	
and complete lines 24 through 26, and lin	nes 30 and 31.		1	
24 Unrestricted	 			
25 Temporarily restricted	}-			
26 Permanently restricted	, check here 🕨 🗓			
Foundations that do not follow SFAS 117, and complete lines 27 through 31.	, check here			
27 Capital stock, trust principal, or current fun	nds	0.	0.	
27 Capital stock, trust principal, or current fun 28 Paid-in or capital surplus, or land, bldg., ar		0.	0.	
29 Retained earnings, accumulated income, e		835,300.	827,077.	
24 Unrestricted 25 Temporarily restricted 26 Permanently restricted Foundations that do not follow SFAS 117, and complete lines 27 through 31. 27 Capital stock, trust principal, or current fun 28 Paid-in or capital surplus, or land, bldg., ar 29 Retained earnings, accumulated income, e 30 Total net assets or fund balances	- Indiana de la composition de	835,300.	827,077.	
	·			
31 Total liabilities and net assets/fund balar	nces	835,300.	827,077.	
Part III Analysis of Changes in N	let Assets or Fund Ba			
Total net assets or fund balances at beginning or	f year - Part II, column (a), line 3)		
(must agree with end-of-year figure reported on		-	1	835,300.
2 Enter amount from Part I, line 27a	. ,,		2	<8,223.
3 Other increases not included in line 2 (itemize)	>		3	0.
4 Add lines 1, 2, and 3			4	827,077.
5 Decreases not included in line 2 (itemize)			5	0.

6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30

/ (a) List and describe th	ne kind(s) of property sold (for exa ehouse, or common stock, 200 sh	mple, real esta	te, (b)		c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a					·	
b SEE ATTACHED	STATEMENTS					
<u>c</u>						<u> </u>
<u>d</u>						
<u>e</u>				<u></u>		
(e) Gross sales price	(f) Depreciation allowed (or allowable)		t or other basis xpense of sale	1	(h) Gain or (lo (e) plus (f) minu)	
	(or unormality	pido o	Aponeo or oalo		(0) plus (1) 1111110	(9)/
<u>a</u> b		 		 		
C		 				
d				 		
e 957,322.			915,622.			41,700.
	gain in column (h) and owned by	the foundation			Gains (Col. (h) ga	
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69		cess of col. (1) col. (j), if any		k), but not less t Losses (from co	
a						
b						
С		ļ		 		
<u>d</u>		ļ		 		
e				 		41,700.
2 Capital gain net income or (net cap	$\{ \text{If gain, also ente} \ \{ \text{If (loss), enter -C} \} $	r in Part I, line)- in Part I, line	7 }	2	 	41,700.
3 Net short-term capital gain or (loss	,	nd (6):	`			
If gain, also enter in Part I, line 8, o	olumn (c).)		3T /	7.3
If (loss), enter -0- in Part I, line 8 Part V Qualification Ur	nder Section 4940(e) for	r Reduced	Tay on Net In	yestment Inco	N/	<u>A</u>
(For optional use by domestic private						
If section 4940(d)(2) applies, leave thi Was the foundation liable for the secti If "Yes," the foundation doesn't qualify Enter the appropriate amount in ea	on 4942 tax on the distributable ar under section 4940(e). Do not coi	mplete this part	t			Yes X No
(a)	(b)		(0			(d) tribution ratio
Base period years Calendar year (or tax year beginnin	والمراجع المراجع	stributions	Net value of nonch	arıtable-use assets	(col. (b)	tribution ratio divided by col. (c))
2016	1	L7,700.		856,293.		.020670
2015		15,127.		919,404.		.049083
2014		L6,100.		913,577.		.017623
2013	3	30,200.		701,495.		.043051
2012						
2 Total of line 1, column (d)					2	.130427
3 Average distribution ratio for the 5		on line 2 by 5.0	0, or by the number o	f years		020605
the foundation has been in existen	ce if less than 5 years				3	.032607
4 Enter the net value of noncharitable	e-use assets for 2017 from Part X,	, line 5			4	925,045.
5 Multiply line 4 by line 3					5	30,163.
6 Enter 1% of net investment incom-	e (1% of Part I, line 27b)				6	345.
7 Add lines 5 and 6					7	30,508.
8 Enter qualifying distributions from	Part XII line 4				8	42,750.
· · · ·		a 1h and some	alata that part warms =	10/, tay rata	L	<u> </u>
See the Part VI instructions.	line 7, check the box in Part VI, line	ני וט, מווט ניטווון	nete that half nould g	ויס נמגומוצ.		
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THE GERALD H. WESTBY, JR. FOUNDATION

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Page 3

Form 990-PF (2017)

	rt VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 49	148 - coo			Page 4	
_		740 - SEE	<u></u>	Clioi	15)_	
1a	Exempt operating foundations described in section 4940(d)(2), check here and enter "N/A" on line 1.	1	,			
	Date of ruling or determination letter: (attach copy of letter if necessary-see instructions)			2	4 =	
D	Domestic foundations that meet the section 4940(e) requirements in Part V, check here X and enter 1%	_1		<u>3</u>	<u>45.</u>	-
	of Part I, line 27b					
	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b).				^	
	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	2			<u>0.</u>	•
-	Add lines 1 and 2	3		<u>_</u>	<u>45.</u>	-
	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	4			0.	
	Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0-	5		<u></u>	<u>45.</u>	-
-	Credits/Payments:					
	2017 estimated tax payments and 2016 overpayment credited to 2017 6a 0.					
	Exempt foreign organizations - tax withheld at source 6b 0.					
	Tax paid with application for extension of time to file (Form 8868) 6c 0.	Ì				
	Backup withholding erroneously withheld 6d 0.	_			_	
	Total credits and payments. Add lines 6a through 6d	7			<u> </u>	-
	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached	8			<u> </u>	-
	Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed	9		3	<u>45.</u>	-
	Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10				-
	Enter the amount of line 10 to be: Credited to 2018 estimated tax					
	art VII-A Statements Regarding Activities					-
18	. During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene i	n		Yes		-
	any political campaign?		1a		X	-
t	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definit	ion	1b_		X	_
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or				ĺ	
	distributed by the foundation in connection with the activities.		1			
(Did the foundation file Form 1120-POL for this year?		1c		X	_
(I Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:		1		l	
	(1) On the foundation. ▶ \$ 0 . (2) On foundation managers. ▶ \$				ł	
•	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation		i i		l	
	managers. ► \$ 0 .					
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?		2		Х	_
	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 incorporation, or				l	
	bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		_ 3		X	
48	a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		4a		Х	
ı	o If "Yes," has it filed a tax return on Form 990-T for this year?	N/A	4b		i	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?		5		Х	-
	If "Yes," attach the statement required by General Instruction T					•
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:				l	
	By language in the governing instrument, or				ĺ	
	By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state legislation.	law	1		ŀ	
	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	X		•
·	, , ,					•
R:	a Enter the states to which the foundation reports or with which it is registered. See instructions.					
	OK		1		l	
1	b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate)				1	
	of each state as required by General Instruction G? If "No," attach explanation		8ь	х	1	
9		ıdar	30	- <u></u>	\vdash	<u></u>
J	year 2017 or the tax year beginning in 2017? See the instructions for Part XIV. If "Yes," complete Part XIV	·uui	9		y	L
10	Did any persons become substantial contributors during the tax year? If "Yes" attach a schedule listing their names and addresses		10		y	•
10	Did uny personne supporting supporting trough the transfer of the supporting tree in the supporting their names and addresses			DE	(20 47)	-

Page 5 Part VII-A | Statements Regarding Activities (continued) Yes No 11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions 11 12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions 12 13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? 13 Website address N/A The books are in care of ▶ <u>JOHN</u> <u>T</u>. <u>WESTBY</u> Telephone no. > 918-743-8321Located at ► 401 S. BOSTON AVE., SUITE 220 ZIP+4 ▶74103 15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year N/A 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 securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country Part VII-B | Statements Regarding Activities for Which Form 4720 May Be Required Yes No 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): Yes X No (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) Yes X No a disqualified person? (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? (5) Transfer any income or assets to a disqualified person (or make any of either available Yes X No 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 Yes X No 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 Х 1b 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 X before the first day of the tax year beginning in 2017? 1c 2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(1)(3) 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," list the years ➤ 2015 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 X statement - see instructions.) 2b 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 Yes X No 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, N/A 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

Form **990-PF** (2017)

had not been removed from jeopardy before the first day of the tax year beginning in 2017?

Form 990-PF (2017) THE GERALD WESTBY, JR Part VII-B Statements Regarding Activities for Which F	. FOUNDATION	Required (contin	**-***88	80	Page 6
	OTTH TIES Way Do I	icquired (contini	Deu)	Vac	No
5a During the year, did the foundation pay or incur any amount to:(1) Carry on propaganda, or otherwise attempt to influence legislation (section)(2) Influence the outcome of any specific public election (see section 4955); or			es X No	103	/
any voter registration drive? (3) Provide a grant to an individual for travel, study, or other similar purposes	?		es X No		
(4) Provide a grant to an organization other than a charitable, etc., organization					i
4945(d)(4)(A)? See instructions (5) Provide for any purpose other than religious, charitable, scientific, literary,	or educational purposes, or f	or	es X No		
the prevention of cruelty to children or animals? b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify und	der the exceptions described i		es X No		
section 53 4945 or in a current notice regarding disaster assistance? See instri	uctions		N/A	5b	
Organizations relying on a current notice regarding disaster assistance, check l	nere				į
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption for expenditure responsibility for the grant?		. —	es 🔲 No		
If "Yes," attach the statement required by Regulations section 53.4945-5(d). 6a Did the foundation, during the year, receive any funds, directly or indirectly, to	201/ 0100011100 00				
a personal benefit contract?	pay premiums on		es X No	ĺ	İ
b Did the foundation, during the year, pay premiums, directly or indirectly, on a p	ersonal benefit contract?	TE		6b	x
If "Yes" to 6b, file Form 8870. 7a At any time during the tax year, was the foundation a party to a prohibited tax s	holter transaction?	[es X No		
b If "Yes," did the foundation receive any proceeds or have any net income attribu		TE		7b	
Part VIII Information About Officers, Directors, Trust Paid Employees, and Contractors		nagers, Highly			
1 List all officers, directors, trustees, and foundation managers and t	heir compensation.				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deterred compensation	(e) Exp account allowa	oense t, other inces
	TRUSTEE				
401 S. BOSTON AVE., SUITE 220				ı	
TULSA, OK 74103	2.00	2,000.	0.		0.
	TRUSTEE				
401 S. BOSTON AVE., SUITE 220	2 00	0.000			•
TULSA, OK 74103	2.00	2,000.	0.		<u>0.</u>
2 Compensation of five highest-paid employees (other than those inc	luded on line 1). If none.	enter "NONE "			
	(b) Title, and average	T	(d) Contributions to employee benefit plans	(e) Exp	oense
(a) Name and address of each employee paid more than \$50,000	hours per week devoted to position	(c) Compensation	employee benefit plans and deferred compensation	account allowa	, other
NONE			ľ		

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

Part VIII Information About Officers, Directors, Trustees, Foundat Paid Employees, and Contractors (continued)	<u>rion</u> **- ion Managers, Highly	* * * 8880 Page 7
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	(4),,,	
	7	
	7	
	_	į
		
	-	
	 	
	-	
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 statistic number of organizations and other beneficiaries served, conferences convened, research papers produced.	cal information such as the	Expenses
1 N/A	, , , , , , , , , , , , , , , , , , , ,	
2		
3		
4		
<u> </u>		
Part IX-B Summary of Program-Related Investments		
Describe the two largest program-related investments made by the foundation during the tax year on li	nes 1 and 2.	Amount
1 <u>N/A</u>		
0		
2		
All other program-related investments. See instructions		
3		
To a distance of the court of		
Total. Add lines 1 through 3	<u>.</u>	0.

Form **990-PF** (2017)

P	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign four	ndations,	see instructions)
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	865,888.
Ь	Average of monthly cash balances	1b	73,244.
C	Fair market value of all other assets	1c	
ď	Total (add lines 1a, b, and c)	1d	939,132.
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation) 1e 0.	ļ	
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	939,132.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	14,087.
5	Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4	5	925,045.
6	Minimum investment return Enter 5% of line 5	6	46,252.
P	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and foreign organizations, check here and do not complete this part.)	d certain	
1	Minimum investment return from Part X, line 6	1	46,252.
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	345.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	45,907.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5_	45,907.
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	45,907.
P	art XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
а	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1a	42,750. 0.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
þ	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	42,750.
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	345.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	42,405.
	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation of	ualifies for	the section

Form **990-PF** (2017)

4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2016	(c) 2016	(d) 2017
1 Distributable amount for 2017 from Part XI,		<u>-</u>		
line 7				45,907.
2 Undistributed income, if any, as of the end of 2017				
a Enter amount for 2016 only		İ	42,513.	
b Total for prior years:			12/01/01	
2015,		16,036.		
3 Excess distributions carryover, if any, to 2017:				
a From 2012				
b From 2013				
c From 2014				
d From 2015		ļ		
e From 2016				
f Total-of lines 3a through e	0.			
•	<u>U.</u>			
4 Qualifying distributions for 2017 from Part XII, line 4: ► \$ 42,750.				
			42 512	
a Applied to 2016, but not more than line 2a			42,513.	
b Applied to undistributed income of prior				
years (Election required - see instructions)		0.		
c Treated as distributions out of corpus				
(Election required - see instructions)	0.	···		
d Applied to 2017 distributable amount				237.
e Remaining amount distributed out of corpus	0.			
Excess distributions carryover applied to 2017 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income. Subtract				 _
line 4b from line 2b		16,036.		
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		0.		
assessed		ļ 0.		
d Subtract line 6c from line 6b. Taxable		10000		
amount - see instructions		16,036.		
e Undistributed income for 2016. Subtract line				
4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2017. Subtract				
lines 4d and 5 from line 1. This amount must				45 650
be distributed in 2018				45,670.
7 Amounts treated as distributions out of				
corpus to satisfy requirements imposed by				
section 170(b)(1)(F) or 4942(g)(3) (Election				
may be required - see instructions)	0.			
8 Excess distributions carryover from 2012				
not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2018)	
Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:	1		_	
a Excess from 2013			ĺ	
b Excess from 2014	[
c Excess from 2015	j			
d Excess from 2016)	
e Excess from 2017	<u> </u>		<u> </u>	

Part XIV Private Operating Fo	ALD H. WEST			**_**	18880 Page 10
			-A, question 9)	N/A	
1 a' If the foundation has received a ruling of		,		,	
foundation, and the ruling is effective for	•		▶ └	104041401	04.1/51
b Check box to indicate whether the found		ig touridation described i		4942(j)(3) or 494	2(j)(5)
2 a Enter the lesser of the adjusted net	Tax year (a) 2017	(b) 2016	Prior 3 years (c) 2015	(d) 2014	(e) Total
income from Part I or the minimum	(8) 20 17	(8) 2010	(6) 2013	(4) 2014	(e) rotar
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			<i>y</i> /		
for active conduct of exempt activities.]"]	
Subtract line 2d from line 2c Complete 3a, b, or c for the		 	 	 - - - - - -	
alternative test relied upon:					
a "Assets" alternative test - enter:	 			<u> </u>	
(1) Value of all assets		 			
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)			!		
b "Endowment" alternative test - enter					
2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter:					
(1) Total support other than gross				ì	
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)		<u> </u>		<u> </u>	
(3) Largest amount of support from					
an exempt organization			<u> </u>		
(4) Gross investment income					
Part XV Supplementary Info			if the foundation	had \$5,000 or mo	re in assets
at any time during t	he year-see insti	ructions.)			
1 Information Regarding Foundation	•				
a List any managers of the foundation where year (but only if they have contributed not only if they have			tributions received by the	foundation before the close	e of any tax
, , , , ,	nore man 40,000). (See s	section 307 (u)(z).)			
NONE	100/		/		
b List any managers of the foundation who other entity) of which the foundation ha			(or an equally large portio	in of the ownership of a par	rtnership or
NONE	v				
2 Information Regarding Contribut	ion, Grant, Gift, Loan	Scholarship, etc. P	rograms:		
Check here ▶ ☐ If the foundation of			_	of accept unsolicited reque	ests for funds. If
the foundation makes gifts, grants, etc.,					
a The name, address, and telephone num	ber or email address of the	ne person to whom appli	cations should be address	sed:	
JOHN T. WESTBY, 918-					
401 S. BOSTON, SUITE					
b The form in which applications should to			hould include:		
GRANT GUIDLINES ARE					
c Any submission deadlines:					
GRANT GUIDELINES ARE	ATTACHED				
d Any restrictions or limitations on award		al areas, charitable fields	, kınds of institutions, or c	other factors:	
GRANT GUIDELINES ARE	ATTACHED				

ALD H. WESTBY, JR. FOUNDATTON

3 Grants and Contributions Paid During th	e Year or Approved for Future	Payment	<u> </u>	<u> </u>
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation	Purpose of grant or contribution	Amount
Name and address (home or business)	or substantial contributor	status of recipient	contribution	
a Paid during the year				
AMERICAN DIABETES ASSOCIATION	NONE	PC	2018 TOUR DE CURE	
6600 S. YALE, SUITE 1310				
TULSA, OK 74136		 		2,500
GILCREASE MUSEUM 1400 N. GILCREASE ROAD	NONE	₽C	SCHOOL BUS	
TULSA, OK 74127		1	TRANSPORTATION	1,000
		1		
RSU PUBLIC TELEVISION	NONE	₽C	I WANT ANSWERS PROGRAM	
1701 W. WILL ROGERS BLVD				
CLAREMORE, OK 74017		_		5,000,
YOUTH SERVICES OF TULSA	NONE	PC	2015 COFFEE HOUSE ARTS	
311 S. MADISON AVE		}	PROGRAM .	
TULSA, OK 74120		 	 	1,250,
URBAN CORE ART PROJECT-ARTS &	NONE	PC	URBAN CORE ART PROJECT	
HUMANITIES COUNCIL 2210 S. MAIN				
TULSA OK 74114		<u> </u>		30_000
Total SEE C	CONTINUATION SHE	ET(S)	▶ 3a	42.750
b Approved for future payment				
NONE				
				
= =				
		ļ		
	}			
				
Total			<u>▶</u> 3b	000 DE (0047

Part XVI-A Analysis of Income-Producing Activities

inter gross amounts unless otherwise indicated	Unrelate	d business income		ded by section 512, 513, or 514	(e)
•	(a) Business code	(b) Amount	(C) Exclu- sion code	(d) Amount	Related or exempt function income
1 Program service revenue:	Coue		Code		
ā			1 - 1		
b		<u> </u>	╁─┤		
<u> </u>			+		
d	<u> </u>		┼─┤		
e			+-+		
g Fees and contracts from government agencies	-		+		
Membership dues and assessments			+		
3 Interest on savings and temporary cash			+		
investments			14	953	
4 Dividends and interest from securities			14	953. 19,304.	
5 Net rental income or (loss) from real estate:			1	15,504.	
a Debt-financed property			1-1		
b Not debt-financed property			 		
6 Net rental income or (loss) from personal			+		
property					
7 Other investment income	 		 		
8 Gain or (loss) from sales of assets other	 		t		
than inventory			18	41,700.	
9 Net income or (loss) from special events	<u> </u>		1	=1,700.	
10 Gross profit or (loss) from sales of inventory			+		
11 Other revenue:			+		
a					
b			 		
C			1		
d			1		
e			1		
12 Subtotal. Add columns (b), (d), and (e)		0.		61,957.	0.
13 Total Add line 12, columns (b), (d), and (e)				13	
(See worksheet in line 13 instructions to verify calculations.)					
Part XVI-B Relationship of Activities to	o the Acc	omplishment of E	xemp	t Purposes	
Line No Explain below how each activity for which income the foundation's exempt purposes (other than the foundation).			A contrib	outed importantly to the accom	plishment of
and restriction of exempt purposes (earlier triain)		mao ioi odoli parpocaoj.			
				 	
					· · · · · · · · · · · · · · · · · · ·
					
				·	
					
		 			
					
	•			 · · · · · · · · · · · · · · · · · ·	
					
	·	 			
					·
	-				
					

Form 990-PF (2017) Part XVII In 7) THE GERALD H. WESTBY, JR. FOUNDATION **-**8880 Information Regarding Transfers to and Transactions and Relationships With Noncharitable Exempt Organizations przation directly or indirectly engage in any of the following with any other organization.

-	•			y with any other organization	iii described iii secti	011 30 1(0)	- } - ⊦	163 140
(other than	n section 501(c)(3) organ	ızatıons) or ın sectio	ın 527, relatınç	to political organizations?				
a Transfers f	from the reporting founda	ition to a noncharita	ble exempt orç	janization of:				}
(1) Cash							1a(1)	X
(2) Other	assets						1a(2)	X
b Other trans	sactions:							
(1) Sales	of assets to a noncharital	ole exempt organizat	tion				16(1)	X
• ,							1b(2)	X
			n gumzation					X
		or other assets					1b(3)	
٠,	_						1b(4)	<u>X</u>
• •							1b(5)	<u>X</u>
							1b(6)	X
							1c	X
								ets,
or services	s given by the reporting fo	oundation. If the four	ndation receive	ed less than fair market valu	ie in any transaction	or sharing arrangement	, show in	
column (d)) the value of the goods,							
a) Line no	(b) Amount involved	(c) Name of	noncharitable	exempt organization	(d) Description	of transfers, transactions, an	d sharing arra	angements
			N/A					
								
								
								
					 			
				· · · · · · · · · · · · · · · · · · ·				
					-			
								
		· · · · · · · · · · · · · · · · · · ·						
								
					+			
				 _	- 			
		L						
	=			or more tax-exempt organi	zations described			
ın section	501(c) (other than section	n 501(c)(3)) or in se	ection 527?				Yes	X No
b If Yes, co	implete the following sch	edule						
	(a) Name of org	anization		(b) Type of organization		(c) Description of relation	iship	
	N/A							
				<u> </u>				
			 		 			
		1-1	' <i></i>		 			
		/ 	-//		<u> </u>	 		
1						, ban and transition and a	May the IRS d	iscuss this
Sign L		7	751		Name of the second		eturn with the shown below?	preparer See instr
(2) Other tassets b Other transactions: (1) Sales of assets to a noncharitable exempt organization (2) Purchases of assets from a noncharitable exempt organization (3) Rental of Solities, equipment, or other assets (4) Reimbursement arrangements (6) Loars or total guarantees (6) Performance of services or membership or fundrasing solicitations (5) Sharing of Solities, equipment, mailing lists, other assets, or paid employees d if the answer to any of the above is "se," complete the following schedule. Column (b) should always show the fair market value of the goods, or services grouped. (b) Amount involved (c) Rame of noncharitable exempt organization (d) becarption of reansfers, transactions, and in section 501(c) (other than section 501(c)(3)) or in section 527? (a) Amount involved (c) Rame of noncharitable exempt organization (e) Description of relations (a) N/A (b) Type of organization (e) Description of relations (a) N/A (c) Description of relations (b) Type of organization (e) Description of relations (c) N/A (c) Description of relations (d) Type of organization (e) Description of relations (e) Description of relations (f) Type of organization (f) Description of the Description of the Description of the Description of the Description of the Description of the Description of the Description of the Description (X Yes	☐ No					
Sign	nature of officer or trustee			Date	Title			
 -	Print/Type preparer's na	s/ng/	Plegarer's s	ignature.	Date	Check If PTIN	J	
	1 //	/ //	Melle			self- employed		
Paid		MISOCK,	EDMABD	MYCOCK	05/11/10	· · · · 1	01270'	726
		OOK OUT					01379	
-	Firm's name MYS	OCK, CHEV	ATTTTE	K % ROTDEN'	п•п•Р.	Firm's LIN > * * -	. * * T8	39
use Only						_		
				SUITE 700				
]TU	LSA, OK 7	4104_			Phone no. 918/	747/6	099
								-PF (2017)

FORM 990-PF INTERE	ST ON SAVI	NGS AND TEM	PORARY	CASH II	NVESTMENTS	STATEMENT	1
SOURCE		(A REVE PER B	ENUE NET IN		(B) NVESTMENT NCOME	(C) ADJUSTED NET INCOME	
MERRILL LYNCH			953.		953.		
TOTAL TO PART I, LI	NE 3		953.		953.		
FORM 990-PF	DIVIDEND	S AND INTER	EST FRO	OM SECUI	RITIES	STATEMENT	2
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDEND			(B) NET INVES MENT INCO		
MERRILL LYNCH	19,808	50	4.	19,304	. 19,30	04.	
TO PART I, LINE 4	19,808	50	4.	19,304	19,30	04.	
FORM 990-PF		LEGAL	FEES			STATEMENT	3
DESCRIPTION		(A) EXPENSES PER BOOKS	NET I	B) NVEST- INCOME	(C) ADJUSTED NET INCOM		
TAX PREPARATION	_	1,410.		1,410.			0.
TO FM 990-PF, PG 1,	LN 16A =	1,410.		1,410.			0.
FORM 990-PF		ACCOUNTI	NG FEE	S		STATEMENT	4
DESCRIPTION		(A) EXPENSES PER BOOKS	NET I	B) NVEST- INCOME	(C) ADJUSTED NET INCOM		
ACCOUNTING FEES	_	9,061.		9,061.			0.
TO FORM 990-PF, PG	1, LN 16B	9,061.		9,061.			0.

FORM 990-PF C	THER PROFES	SIONAL FEES	STATEMENT 5			
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME		(D) CHARITABLE PURPOSES		
INVESTMENT FEES	6,766.	6,766.		0.		
TO FORM 990-PF, PG 1, LN 16C =	6,766.	6,766.		0.		
FORM 990-PF	TAXES		STATEMENT 6			
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME		(D) CHARITABLE PURPOSES		
NET INVESTMENT INCOME	5,113.	5,113.		0.		
TO FORM 990-PF, PG 1, LN 18	5,113.	5,113.		0.		
FORM 990-PF	OTHER E	XPENSES		STATEMENT 7		
FORM 990-PF DESCRIPTION	OTHER E (A) EXPENSES PER BOOKS	(B) NET INVEST-	(C) ADJUSTED	(D) CHARITABLE		
	(A) EXPENSES	(B) NET INVEST- MENT INCOME	(C) ADJUSTED	(D) CHARITABLE		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED	(D) CHARITABLE PURPOSES		
DESCRIPTION OFFICE EXPENSE	(A) EXPENSES PER BOOKS 685.	(B) NET INVEST- MENT INCOME 685.	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES		
DESCRIPTION OFFICE EXPENSE TO FORM 990-PF, PG 1, LN 23	(A) EXPENSES PER BOOKS 685.	(B) NET INVEST- MENT INCOME 685. 685.	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES 0.		
DESCRIPTION OFFICE EXPENSE TO FORM 990-PF, PG 1, LN 23 FORM 990-PF	(A) EXPENSES PER BOOKS 685.	(B) NET INVEST- MENT INCOME 685. 685.	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES 0. 0. STATEMENT 8		



	FAIR MARKET
BOOK VALUE	VALUE
28,178.	39,468.
28,178.	39,468.
	STATEMENT 1
	28,178.

FORM/LINE IDENTIFIER AND DESCRIPTION/RETURN REFERENCE

PART VII-B, LINE 1A(3) - SEE EXPLANATION BELOW

EXPLANATION:

THE GERALD H. WESTBY, JR. FOUNDATION OCCUPIES OFFICE SPACE LEASED BY THE WESTBY, LLC. THE LLC MEMBERS INCLUDE JOHN T. WESTBY, A DIRECTOR OF THE FOUNDATION. THE FOUNDATION PAID \$9061 FOR RENT AND ACCOUNTING AND OTHER ADMINISTRATIVE EXPENSES.

Capital Gains and Losses for Tax on Investment Income (b) How acquired (c) Date acquired (a) List and describe the kind(s) of property sold, e.g., real estate, (d) Date sold Purchase 2-story brick warehouse; or common stock, 200 shs. MLC Co. (mo., day, yr) (mo., day, yr.) D - Donation 1a MERRILL LYNCH-DETAIL ATTACHED P b MERRILL LYNCH-DETAIL ATTACHED P c MERRILL LYNCH-DETAIL ATTACHED P P d MERRILL LYNCH-DETAIL ATTACHED e MERRILL LYNCH-DETAIL ATTACHED P MERRILL LYNCH-DETAIL ATTACHED P g MERRILL LYNCH-DETAIL ATTACHED P h MERRILL LYNCH-DETAIL ATTACHED P MERRILL LYNCH-DETAIL ATTACHED P MERRILL LYNCH-DETAIL ATTACHED Ρ k MERRILL LYNCH-DETAIL ATTACHED Р | MERRILL LYNCH-DETAIL ATTACHED Ρ m MERRILL LYNCH-DETAIL ATTACHED P n MERRILL LYNCH-DETAIL ATTACHED Ρ P • MERRILL LYNCH-DETAIL ATTACHED (g) Cost or other basis (h) Gain or (loss) (f) Depreciation allowed (e) Gross sales price (or allowable) plus expense of sale (e) plus (f) minus (g) 57,918. 53,378. 4,540. а 48. 48. b 0. <13,047.> 170,889. 183,936. C 169. 169. d 89,163. 90,684. <u><1,521.</u>> е 111,404. 106,068. 5,336. 24,352. 29,148. <4,796.>g 132,366. 137,037. 4,671. h 0. 924. 924. 14,292. 14,230. 62. 48,872. 50,000. <1,128.> k 4,351. 4,347. 4. 29,474. 32,481. <3,007.> m 57,129. 61,496. 4,367. n 3,051. 2,596. 455. 0 Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 (I) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), (j) Adjusted basis (k) Excess of col. (ı) (i) F.M.V. as of 12/31/69 but not less than "-0-") as of 12/31/69 over col. (j), if any 4,540. 0. b <13,047.> 169. ď <1,521.> е <u>5,336.</u> <4,796.> 4,<u>671.</u> h 0. 62. <1,128.> 4. <3,007.> m 4,367. n 45<u>5.</u> 0 If gain, also enter in Part I, line 7 Capital gain net income or (net capital loss) 2 If (loss), enter "-0-" in Part I, line 7 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.			(b) How acquired P - Purchase D - Donation (c) Date acquired (mo., day, yr.)		(d) Date sold (mo., day, yr.)
				(, 20),),,)	-
MERRILL LYNCH-DETAIL ATTACHED			P		
MERRILL LYNCH-DETAIL ATTACHED MERRILL LYNCH-DETAIL ATTACHED			P P		
			_ 	 	
d CAPITAL GAINS I	JI VIDENDS		_	 	
<u>e</u>				-	
<u>f</u>					
9					
h			·		
<u> </u>					
<u></u>					
<u>k</u>					
			- 	 -	
<u>m</u>			-	 	
0				 	
0	(f) Depreciation allowed	(g) Cost or other basis) Gain or (loss)	
(e) Gross sales price	(or allowable)	plus expense of sale	(e) i	olus (f) minus (g)	
4,017.		2,694.			1,323
196,086.		151,432.		· · · · · · · · · · · · · · · · · · ·	44.654
3,275.		4,161.	_		44,654 <886
504.					504
8					
f					-
g					
h					
1					
k					
1					
m					
n					
0					
	ng gain in column (h) and owned by	the foundation on 12/31/69	(I) Lo	sses (from col. (h))	
(ı) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	Gains (excess	of col. (h) gaın over not less than "-0-")	col. (k),
a					1,323
<u>b</u>			=		44,654
C					<886
<u>d</u>					504
e					
f					
9					
h		 			
1					
J					
k					•
İ					
m					
n					
0					
	, If nam also ente	er in Part I line 7			
2 Capital gain net income or (net ca		\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \	2		41,700
3 Net short-term capital gain or (los If gain, also enter in Part I, line 8,	column (c).	ınd (6):		NI / A	