

For calendar year 2017, or tax year beginning 01-01-2017, and ending 12-31-2017

Name of foundation SHEAR FAMILY FOUNDATION INC		A Employer identification number 47-1833006	
Number and street (or P O box number if mail is not delivered to street address) 103 GAMMA DRIVE NO 120		Room/suite	B Telephone number (see instructions) (412) 580-6297
City or town, state or province, country, and ZIP or foreign postal code PITTSBURGH, PA 15238		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		D 1. Foreign organizations, check here ☐ 2 Foreign organizations meeting the 85% test, check here and attach computation ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 176,680,654	J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) (Part I, column (d) must be on cash basis)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check ☒ If the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	570,894	570,894		
	4 Dividends and interest from securities	2,092,925	2,092,925		
	5a Gross rents	69	69		
	b Net rental income or (loss) 69				
	6a Net gain or (loss) from sale of assets not on line 10	3,239,912			
	b Gross sales price for all assets on line 6a 20,148,961				
	7 Capital gain net income (from Part IV, line 2)		3,232,434		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	812,179	907,445		
	12 Total. Add lines 1 through 11	6,715,979	6,803,767		
	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	2,587	2,587		0
	b Accounting fees (attach schedule)	27,863	27,863		0
	c Other professional fees (attach schedule)	1,228,658	718,658		510,000
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	20,719	10,719		0
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	6,653	781		5,872
	24 Total operating and administrative expenses. Add lines 13 through 23	1,286,480	760,608		515,872
	25 Contributions, gifts, grants paid	7,685,000			7,685,000
	26 Total expenses and disbursements. Add lines 24 and 25	8,971,480	760,608		8,200,872
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-2,255,501			
	b Net investment income (if negative, enter -0-)		6,043,159		
c Adjusted net income(if negative, enter -0-)					

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)			
		Beginning of year (a) Book Value	End of year (b) Book Value (c) Fair Market Value		
Assets	1	Cash—non-interest-bearing		1,574,082	1,574,082
	2	Savings and temporary cash investments	70,334,745	37,033,998	37,033,998
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges	67,500	41,500	41,500
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	66,608,899	102,292,137	102,292,137
	c	Investments—corporate bonds (attach schedule)	209,105	210,820	210,820
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	27,195,122	35,528,117	35,528,117
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)				
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	164,415,371	176,680,654	176,680,654	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons	124,182		
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)	124,182	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☒ and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted	164,291,189	176,680,654	
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see instructions)	164,291,189	176,680,654	
	31	Total liabilities and net assets/fund balances (see instructions) .	164,415,371	176,680,654	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	164,291,189
2	Enter amount from Part I, line 27a	2	-2,255,501
3	Other increases not included in line 2 (itemize) ▶ _____	3	14,644,966
4	Add lines 1, 2, and 3	4	176,680,654
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 .	6	176,680,654

Part IV Capital Gains and Losses for Tax on Investment Income

(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)
1a See Additional Data Table			
b			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a See Additional Data Table			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) 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	
a See Additional Data Table			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	3,232,434
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	

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

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

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

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



Yes



No

If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2016	4,466,022	161,785,738	0 027605
2015	406	78,256,671	0 000005
2014	0	0	0 000000
2013			
2012			

2 Total of line 1, column (d)	2	0 027610
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 009203
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	4	171,931,961
5 Multiply line 4 by line 3	5	1,582,290
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	60,432
7 Add lines 5 and 6	7	1,642,722
8 Enter qualifying distributions from Part XII, line 4	8	8,200,872

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b	1	60,432
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3	Add lines 1 and 2.	3	60,432
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	60,432
6	Credits/Payments		
a	2017 estimated tax payments and 2016 overpayment credited to 2017	6a	24,897
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	0
7	Total credits and payments. Add lines 6a through 6d.	7	84,897
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	21
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	24,444
11	Enter the amount of line 10 to be Credited to 2018 estimated tax ☐ 24,444 Refunded ☐	11	0

Part VII-A Statements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	Yes	No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? If the answer is "Yes" to 1a or 1b , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities	1b		No
c	Did the foundation file Form 1120-POL for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ☐ \$ _____ 0 (2) On foundation managers ☐ \$ _____ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$ _____ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	Yes	
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b	Yes	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
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	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ PA			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2017 or the taxable year beginning in 2017 (see instructions for Part XIV)? If "Yes," complete Part XIV	9		No
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		No

Part VII-A Statements Regarding Activities (continued)

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		No
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		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A	13	Yes	
14	The books are in care of RICK ROADARMEL Telephone no (412) 580-6297			

Located at **103 GAMMA DRIVE PITTSBURGH PA** ZIP+4 **15238**

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 15			
16	At any time during calendar year 2017, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR). If "Yes," enter the name of the foreign country ▶	16	Yes	No

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)		Yes	No
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☒ Yes ☐ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? ☐ Organizations relying on a current notice regarding disaster assistance check here. ☐	1b		No
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2017? ☐	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2017, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2017? ☐ Yes ☒ No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions). ☐	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2017 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2017). ☐	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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		No

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

5a	During the year did the foundation pay or incur any amount to				
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes ☒ No			
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	☐ Yes ☒ No			
	(3) Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes ☒ No			
	(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions).	☐ Yes ☒ No			
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes ☒ No			
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?		5b		
	Organizations relying on a current notice regarding disaster assistance check here.	☐			
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	☐ Yes ☐ No			
	<i>If "Yes," attach the statement required by Regulations section 53.4945–5(d)</i>				
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes ☒ No			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		6b	No	
	<i>If "Yes" to 6b, file Form 8870</i>				
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes ☒ No			
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?		7b		

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1

List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
BARBARA S SHEAR 103 GAMMA DRIVE SUITE 120 PITTSBURGH, PA 15238	PRESIDENT/DIRECTOR 0 40	0	0	0
HERBERT S SHEAR 103 GAMMA DRIVE SUITE 120 PITTSBURGH, PA 15238	VICE PRESIDENT/DIRECTOR 0 40	0	0	0
GERALD A SHEAR 103 GAMMA DRIVE SUITE 120 PITTSBURGH, PA 15238	SECRETARY/DIRECTOR 0 40	0	0	0
JOHN A SHEAR 103 GAMMA DRIVE SUITE 120 PITTSBURGH, PA 15238	TREASURER/DIRECTOR 0 40	0	0	0

2

Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	Title, and average hours per week (b) devoted to position	(c) Compensation	Contributions to employee benefit plans and deferred compensation (d)	Expense account, (e) other allowances
NONE				

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

0

3

Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services.

0

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See instructions.	
3	

Total. Add lines 1 through 3

0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities.	1a	93,478,596
b	Average of monthly cash balances.	1b	49,659,523
c	Fair market value of all other assets (see instructions).	1c	31,412,095
d	Total (add lines 1a, b, and c).	1d	174,550,214
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	174,550,214
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	2,618,253
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	171,931,961
6	Minimum investment return. Enter 5% of line 5.	6	8,596,598

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

1	Minimum investment return from Part X, line 6.	1	8,596,598
2a	Tax on investment income for 2017 from Part VI, line 5.	2a	60,432
b	Income tax for 2017 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	60,432
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	8,536,166
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	8,536,166
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	8,536,166

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26.	1a	8,200,872
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	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	4	8,200,872
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions).	5	60,432
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	8,140,440

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2016	(c) 2016	(d) 2017
1 Distributable amount for 2017 from Part XI, line 7				8,536,166
2 Undistributed income, if any, as of the end of 2017				
a Enter amount for 2016 only.			7,453,487	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2017				
a From 2012.				
b From 2013.				
c From 2014.				
d From 2015.				
e From 2016.				
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2017 from Part XII, line 4 ▶ \$ <u>8,200,872</u>				
a Applied to 2016, but not more than line 2a			7,453,487	
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.				747,385
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2017 (If an amount appears in column (d), the same amount must be shown in column (a))	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
b Prior years' undistributed income Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2016 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2017 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2018				7,788,781
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2012 not applied on line 5 or line 7 (see instructions).	0			
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a	0			
10 Analysis of line 9				
a Excess from 2013.				
b Excess from 2014.				
c Excess from 2015.				
d Excess from 2016.				
e Excess from 2017.				

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2017, enter the date of the ruling. ▶

b Check box to indicate whether the organization is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

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

	Tax year	Prior 3 years			(e) Total
	(a) 2017	(b) 2016	(c) 2015	(d) 2014	
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					

3 Complete 3a, b, or c for the alternative test relied upon

a "Assets" alternative test—enter

(1) Value of all assets

(2) Value of assets qualifying under section 4942(j)(3)(B)(i)

b "Endowment" alternative test— enter 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 Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see instructions.)

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))
See Additional Data Table

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

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

Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

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

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

c Any submission deadlines

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

Part XV **Supplementary Information** (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i> See Additional Data Table				
Total ▶ 3a				7,685,000
b <i>Approved for future payment</i> DUQUESNE UNIVERSITY OF THE HOLY SPIRIT 409 ADMIN BLDG 600 FORBES AVE PITTSBURGH, PA 15282	N/A	PC	BASKETBALL SCHOLARSHIP	600,000
THE PITTSBURGH PROMISE 1901 CENTRE AVE STE 204 PITTSBURGH, PA 15219	N/A	PC	SCHOLARSHIP	22,500
Total ▶ 3b				622,500

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2017)

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

	Yes	No
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1a(1)	No
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1a(2)	No
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1b(1)	No
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1b(2)	No
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1b(3)		No
--------------	--	-----------

1b(4)		No
--------------	--	-----------

1b(5)	No
--------------	-----------

1b(6)		No
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1c		No
----	--	----

value
ue

[illegible]

described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

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

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

**Sign
Here**

2018-11-13

May the IRS discuss this return with the preparer shown below

(see instr)? ☒ Yes ☐ No

**Paid
Preparer
Use Only**

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN P00227231
	EUGENE J LOGAN				
	Firm's name ▶ SCHNEIDER DOWNS & CO INC Firm's address ▶ ONE PPG PLACE SUITE 1700 PITTSBURGH, PA 15222				
					Firm's EIN ▶ 25-1408703 Phone no (412) 261-3644

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

List and describe the kind(s) of property sold (e.g., real estate, (a) 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)
PUBLICLY TRADED SECURITIES	P		
PUBLICLY TRADED SECURITIES	P		
ALTERNATIVE INVESTMENTS	P		
ALTERNATIVE INVESTMENTS	P		
WELLINGTON ARCHIPELAGO	P		
ION ISRAEL	P		

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
7,518,008		7,031,355	486,653
8,388,689		5,877,694	2,510,995
177,384		2,634	174,750
13,712		4,844	8,868
1,920,315		2,000,000	-79,685
2,130,853		2,000,000	130,853

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			486,653
			2,510,995
			174,750
			8,868
			-79,685
			130,853

Form 990PF Part XV Line 1a - List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000).

BARBARA S SHEAR
HERBERT S SHEAR
GERALD A SHEAR
JOHN A SHEAR

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
AMERICAN LOGISTICS AID NETWORK 333 E BUTTERFIELD RD SUITE 140 LOMBARD, IL 60148	N/A	PC	PROGRAM SUPPORT	10,000
ALL HANDS VOLUNTEERS 6 COUNTY RD SUITE 6 MATTAPOISETT, MA 02739	N/A	PC	FLOOD RELIEF	10,000
ALPERT JEWISH FAMILY & CHILDREN'S SERVICES PALM BEACH 5841 CORPORATE WAY WEST PALM BEACH, FL 33407	N/A	PC	ASSISTANCE TO HOLOCAUST SURVIVORS	250,000
Total ► 3a				7,685,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
AMERICAN ISRAEL EDUCATION FUND 251 H ST NW WASHINGTON, DC 20001	N/A	PC	AIEF	250,000
AMERICAN FRIENDS OF ISRAEL SPORT CENTER FOR THE DISABLED 1 NORTHFIELD PLAZA STE 300 NORTHFIELD, IL 60093	N/A	PC	PROGRAM SUPPORT	10,000
AMERICAN FRIENDS OF LEKET ISRAEL INC PO BOX 2090 TEANECK, NJ 07666	N/A	PC	FOOD RESCUE AND PROVISION FOR ISRAEL'S NEEDY	500,000
Total ▶ 3a				7,685,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
AMERICAN FRIENDS OF MAGEN DAVID ADOM 3300 PGA BLVD STE 970 PALM BEACH GARDENS, FL 33410	N/A	PC	PROGRAM SUPPORT	150,000
AMERICAN FRIENDS OF THE UNION OF PRO JEWS 4905 FIFTH AVENUE PITTSBURGH, PA 15213	N/A	PC	EASTERN EUROPEAN STUDENT SUPPORT	25,000
AMERICAN FRIENDS OF VIBE ISRAEL 124 MERCER ST STE 2 JERSEY CITY, NJ 07302	N/A	PC	EDUCATION THRU SOCIAL MEDIA	50,000
Total ▶ 3a				7,685,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ANIMAL FRIENDS562 CAMP HORNE RD PITTSBURGH, PA 15237	N/A	PC	ANIMAL RESCUE	7,500
BERNARD ZELL ANSHE EMET DAY SCHOOL 3751 NORTH BROADWAY ST CHICAGO, IL 60613	N/A	PC	SCHOOL'S CAPITAL CAMPAIGN	150,000
BERNARD ZELL ANSHE EMET DAY SCHOOL 3751 NORTH BROADWAY ST CHICAGO, IL 60613	N/A	PC	LEARNING SERVICES	125,000
Total 3a				7,685,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BIG BROTHERS BIG SISTERS OF UTAH 2121 SOUTH STATE STREET SALT LAKE CITY, UT 84115	N/A	PC	MENTORING PROGRAM	75,000
BIRTHRIGHT ISRAEL 33 EAST 33RD ST STE 700 NEW YORK, NY 10016	N/A	PC	PROGRAM SUPPORT	72,000
BOY SCOUTS OF AMERICA 1275 BEDFORD AVE PITTSBURGH, PA 15219	N/A	PC	LAUREL HIGHLANDS COUNCIL	15,000
Total ▶ 3a				7,685,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BROTHERS BROTHER FOUNDATION 1200 GALVESTON AVE PITTSBURGH, PA 15233	N/A	PC	FLOOD RELIEF	10,000
CENTRAL CATHOLIC HIGH SCHOOL 4720 FIFTH AVE PITTSBURGH, PA 15213	N/A	PC	STALEY FAMILY PROJECT	10,000
CHILDREN'S HOSPITAL OF CHICAGO 225 E CHICAGO AVE CHICAGO, IL 60611	N/A	PC	CHILD LIFE SERVICES	40,000
Total ▶ 3a				7,685,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CHILDREN'S HOSPITAL OF CHICAGO 225 E CHICAGO AVE CHICAGO, IL 60611	N/A	PC	MOLECULAR ONCOLOGY & BIOINFORMATICS PROGRAM	175,000
CHILDREN'S HOSPITAL OF PITTSBURGH FOUNDATION 4401 PENN AVE PITTSBURGH, PA 15224	N/A	PC	RESEARCH TO IMPROVE OUTCOMES OF HARD TO TREAT PEDIATRIC BRAIN TUMORS	150,000
CONGREGATION BETH SHALOM 5915 BEACON ST PITTSBURGH, PA 15217	N/A	PC	YOUTH PROGRAM	75,000
Total ► 3a				7,685,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CONNOQUENESSING VALLEY ELEMENTARY PTO 300 S PITTSBURGH ST ZELIENOPLE, PA 16063	N/A	PC	EDUCATION , SUPPLIES	7,500
CURE ALZHEIMER'S FUND 34 WASHINGTON ST WELLESLEY HILLS, MA 02481	N/A	PC	RESEARCH	100,000
DEER LAKES TOUCHDOWN CLUB PO BOX 97 RUSSELLTON, PA 15076	N/A	PC	EDUCATION, EQUIPMENT	12,000
Total ▶ 3a				7,685,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
DUQUESNE UNIVERSITY OF THE HOLY SPIRIT 409 ADMIN BLDG 600 FORBES AVE PITTSBURGH, PA 15282	N/A	PC	BASKETBALL SCHOLARSHIP	250,000
EDU NATIONS INC8800 PEEBLES RD ALLISON PARK, PA 15101	N/A	PC	EQUIP COMMUNITY MEDICAL CENTER IN AFRICA	15,000
FOOD BANK OF CORPUS CHRISTI 826 KRILL STREET CORPUS CHRISTI, TX 78408	N/A	PC	FLOOD RELIEF	35,000
Total ▶ 3a				7,685,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
FOUNDATION FOR THE DEFENSE OF DEMOCRACIES PO BOX 332489 WASHINGTON, DC 20033	N/A	PC	POLITICAL EDUCATION	100,000
FRIENDS FOR LAS VEGAS METROPOLITAN POLICE DEPT FOUNDATION 400 S MLK BLVD LAS VEGAS, NV 89106	N/A	PC	LAW ENFORCEMENT SUPPORT	10,000
FRIENDS OF IR DAVID 575 LEXINGTON AVE NEW YORK, NY 10022	N/A	PC	CITY OF DAVID ANCIENT JERUSALEM	150,000
Total ▶ 3a				7,685,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
FRIENDS OF THE DANIEL CENTERS FOR PROGRESSIVE JUDAISM 4108 LELAND ST CHEVY CHASE, MD 20615	N/A	PC	FIGHT FOR RIGHTS	45,000
FRIENDS OF THE ISRAELI DEFENSE FORCES 29 EAST MADISON ST CHICAGO, IL 60602	N/A	PC	IMPACT SCHOLARSHIP PROGRAM, SPONSOR STUDENTS AT GALA	75,000
FRIENDS OF THE UNITED HATZALAH 205 E 42ND ST NEW YORK, NY 10017	N/A	PC	ADOPT A MEDIC PROGRAM	90,000
Total 				7,685,000
3a				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
GREATER CHICAGO FOOD DEPOSITORY 4100 W 42ND PLACE CHICAGO, IL 60632	N/A	PC	HUNGER ISSUES	125,800
GREATER PITTSBURGH COMMUNITY FOOD BANK 11 LINDEN ST DUQUESNE, PA 15110	N/A	PC	OPERATING FUNDS	100,000
HEALTHNETWORK FOUNDATION 33 RIVER ST CHAGRIN FALLS, OH 44022	N/A	PC	MISSION & LONG RANGE STABILITY	35,000
Total ► 3a				7,685,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
HEBREW UNION COLLEGE ONE WEST FOURTH ST NEW YORK, NY 10012	N/A	PC	INSTITUTE OF RELIGION CORE SUPPORT	250,000
HOUSTON FOOD BANK 535 PORTWALL ST HOUSTON, TX 77029	N/A	PC	FLOOD RELIEF	35,000
HOUSTON HUMANE SOCIETY 14700 ALMEDA RD HOUSTON, TX 77053	N/A	PC	FLOOD RELIEF	10,000
Total 				7,685,000
3a				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ISRAEL CANCER RESEARCH FUND 2 NORTHFIELD PLAZA NORTHFIELD, IL 60093	N/A	PC	RESPONSIVENESS TO BREAST CANCER ADJUVANT THERAPIES	49,500
ISRAEL IDEAS 3400 S OCEAN BLVD STE 7H2 PALM BEACH, FL 33480	N/A	PC	PROGRAM SUPPORT	25,000
JEWISH COMMUNITY CENTER CHICAGO 3050 WINDRIDGE RD NORTHBROOK, IL 60062	N/A	PC	CAMP CHI	10,000
Total ▶ 3a				7,685,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
JEWISH FAMILY & CHILDREN'S SERVICES OF PITTSBURGH 5743 BARTLETT ST PITTSBURGH, PA 15217	N/A	PC	OPERATING FUNDS- FOR JF&C SERVICES AND SQUIRREL HILL FOOD PANTRY	250,000
JEWISH FEDERATION OF GREATER PITTSBURGH 234 MCKEE PLACE PITTSBURGH, PA 15213	N/A	PC	PROGRAM SUPPORT	100,000
JEWISH NATIONAL FUND 60 REVERE DR SUITE 840 NORTHBROOK, IL 60062	N/A	PC	ISRAEL FIREFIGHTERS	150,000
Total 				7,685,000
3a				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
JEWISH NATIONAL FUND 902 CLINT MOORE RD- STE 128 BOCA RATON, FL 33487	N/A	PC	COMMUNITY BUILDING, FORESTRY, AGRICULTURE IN ISRAEL	250,000
LIGHT OF LIFE MISSION 913 WESTERN AVE PITTSBURGH, PA 15233	N/A	PC	MINISTRIES	15,000
MAKE A WISH GREATER PA AND WV GULF TOWER PITTSBURGH, PA 15219	N/A	PC	IN MEMORY OF JEFFREY STUCKLEY	5,000
Total ▶ 3a				7,685,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
MOUNTAIN TRAILS FOUNDATION PO BOX 754 PARK CITY, UT 84060	N/A	PC	CONSERVANCY	10,000
NATIONAL ALLIANCE FOR MENTAL ILLNESS 3803 N FAIRFAX DR ARLINGTON, VA 22203	N/A	PC	HELPING PEOPLE LIVING WITH SCHIZOPHRENIA AND THEIR FAMILIES	75,000
NATIONAL MS SOCIETY - KEYSTONE CHAPTER 1501 REEDSDALE ST PITTSBURGH, PA 15233	N/A	PC	MS 150 ROBERT GLIMCHER	7,500
Total ▶ 3a				7,685,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
NORTHERN ISRAEL CENTER FOR ARTS & TECHNOLOGY 310 GRANT ST PITTSBURGH, PA 15219	N/A	PC	TRAINING CENTER IN AKKO ISRAEL	35,000
PITTSBURGH AVIATION ANIMAL RESCUE TEAM 15 ALLEGHENY COUNTY AIRPORT WEST MIFFLIN, PA 15122	N/A	PC	ANIMAL RESCUE	5,000
PALM BEACH COUNTY FOOD BANK 525 GATOR LANE LANTANA, FL 33462	N/A	PC	HUNGER RELIEF	50,000
Total ▶ 3a				7,685,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
PALM BEACH POLICE FOUNDATION 139 N COUNTY RD PALM BEACH, FL 33480	N/A	PC	PROGRAM SUPPORT	25,000
PEGGY ADAMS ANIMAL RESCUE LEAGUE 3200 N MILITARY TRAIL WEST PALM BEACH, FL 33409	N/A	PC	PET RESCUE	10,000
PITTSBURGH JEWISH PUBLICATION & EDUCATION FOUNDATION 5915 BEACON ST PITTSBURGH, PA 15217	N/A	PC	JEWISH NEWSPAPER	10,000
Total ▶ 3a				7,685,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SPECIAL OLYMPICS PA INC CEDAR RIDGE BUSINESS PARK PITTSBURGH, PA 15205	N/A	PC	UNIFIED SPORTS PROGRAM	7,500
STAND WITH USPO BOX 811355 BOCA RATON, FL 33481	N/A	PC	ISRAEL EMERGENCY ALLIANCE	50,000
SUMMIT LAND CONSERVANCY PO BOX 1775 PARK CITY, UT 84060	N/A	PC	CONSERVANCY	20,000
Total 				7,685,000
3a				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
TEACH FOR AMERICA- LAS VEGAS 701 BRIDGET AVE LAS VEGAS, NV 89101	N/A	PC	PROGRAM SUPPORT	40,000
THE ANTI CRUELTY SOCIETY 157 W GRAND AVE CHICAGO, IL 60654	N/A	PC	ANIMAL RESCUE	2,700
THE CRANBERRY CUPPO BOX 1614 CRANBERRY TWP, PA 16060	N/A	PC	ASSISTANCE FAMILIES IN NEED	7,500
Total ▶ 3a				7,685,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
THE FRIENDSHIP CIRCLE 1922 MURRAY AVE PITTSBURGH, PA 15217	N/A	PC	CAMPAIGN FOR A PERMANENT HOME	20,000
THE PITTSBURGH PROMISE 1901 CENTRE AVE STE 204 PITTSBURGH, PA 15219	N/A	PC	SCHOLARSHIP	7,500
THE STEADMAN CLINIC 181 W MEADOW DR STE 1000 VAIL, CO 81657	N/A	PC	PROGRAM SUPPORT	100,000
Total ▶ 3a				7,685,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
THREE SQUARE4190 N PECOS RD LAS VEGAS, NV 89115	N/A	PC	CHILDHOOD NUTRITION PROGRAMS	215,000
UMC CHILDREN'S HOSPITAL 1800 W CHARLESTON BLVD LAS VEGAS, NV 89102	N/A	PC	EQUIPMENT REPLACEMENT	500,000
UMC CHILDREN'S HOSPITAL 1800 W CHARLESTON BLVD LAS VEGAS, NV 89102	N/A	PC	HOLIDAY FUND	15,000
Total ▶ 3a				7,685,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
UNIVERSITY OF PITTSBURGH 116 ATWOOD STREET PITTSBURGH, PA 15260	N/A	PC	VARIOUS PROGRAMS	1,900,000
WEST DEER TECHPO BOX 173 RUSSELLTON, PA 15076	N/A	PC	BLESSINGS IN A BACKPACK PROGRAM	3,000
WESTERN STATE COLORADO UNIVERSITY 909 E ESCALANTE DR GUNNISON, CO 81231	N/A	PC	FRONT RANGE INITIATIVE	110,000
Total 				7,685,000
3a				

TY 2017 Accounting Fees Schedule**Name:** SHEAR FAMILY FOUNDATION INC**EIN:** 47-1833006**Accounting Fees Schedule**

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	27,863	27,863		0

TY 2017 Investments Corporate Bonds Schedule

Name: SHEAR FAMILY FOUNDATION INC

EIN: 47-1833006

Investments Corporate Bonds Schedule

Name of Bond	End of Year Book Value	End of Year Fair Market Value
2,416 SHS ISHARES IBOXX HIGH YIELD BOND ETF	210,820	210,820

TY 2017 Investments Corporate Stock Schedule

Name: SHEAR FAMILY FOUNDATION INC
EIN: 47-1833006

Name of Stock	End of Year Book Value	End of Year Fair Market Value
28,023 SHS GUGGENHEIM S&P 500 EQUAL WEIGHT ETF	2,831,184	2,831,184
8,885 SHS ISHARES CORE HIGH DIVIDEND ETF	800,894	800,894
6,900 SHS ISHARES INTERNATIONAL SEL DIV ETF	233,151	233,151
2,901 SHS ISHARES MICRO CAP ETF	277,655	277,655
5,200 SHS ISHARES MSCI EAFE ETF	365,612	365,612
6,055 SHS ISHS RUSSELL TOP 200 GR	442,923	442,923
5,132 SHS ISHARES US PREFERRED STOCK ETF	195,375	195,375
45,094 SHS PROSHARES S&P 500 DIV ARISTOCRAT ETF	2,887,838	2,887,838
6,978 SHS VANGUARD FTSE ALL WORLD EX US ETF	381,836	381,836
11,465 SHS VANGUARD FTSE DEVELOPED MARKETS ETF	514,320	514,320
12,300 SHS VANGUARD FTSE EMERGING MARKETS ETF	564,693	564,693
16,355 SHS VANGUARD GROWTH ETF	2,300,331	2,300,331
12,837 SHS VANGUARD SM CAP GROWTH	2,064,831	2,064,831
1,787 SHS VANGUARD SM CAP ETF	264,119	264,119
7,777 SHS VANGUARD SM CAP VALUE ETF	1,032,630	1,032,630
8,435 SHS VANGUARD VALUE ETF	896,809	896,809
3,977 SHS VANGUARD FTSE ALL WRLD EX US SM CAP ETF	474,178	474,178
2,500 SHS ALPHABET INC.	2,616,000	2,616,000
12,000 SHS BERKSHIRE HATHAWAY	2,378,640	2,378,640
20,000 SHS CHEVRON CORPORATION	2,503,800	2,503,800
60,000 SHS CISCO SYSTEMS INC	2,298,000	2,298,000
100,000 SHS CORNING INC	3,199,000	3,199,000
30,000 SHS CVS HEALTH CORP	2,175,000	2,175,000
44,870 SHS DOWDUPONT INC	3,195,641	3,195,641
12,000 SHS FEDEX CORPORATION	2,994,480	2,994,480
60,000 SHS GENERAL MOTORS CO	2,459,400	2,459,400
50,000 SHS INTEL CORP	2,308,000	2,308,000
12,000 SHS JOHNSON & JOHNSON	1,676,640	1,676,640
65,000 SHS JOHNSON CTLS INTL	2,477,150	2,477,150
30,000 SHS JPMORGAN CHASE & CO	3,208,200	3,208,200

Name of Stock	End of Year Book Value	End of Year Fair Market Value
40,000 SHS MICROSOFT CORP	3,421,600	3,421,600
20,000 SHS NESTLE NA	1,719,400	1,719,400
50,000 SHS PFIZER INCORPORATED	1,811,000	1,811,000
55,000 SHS QUALCOMM INC	3,521,100	3,521,100
20,000 SHS SCHLUMBERGER LTD	1,347,800	1,347,800
25,000 SHS VERIZON COMMUNICATION	1,323,250	1,323,250
10,000 SHS 3M COMPANY	2,353,700	2,353,700
119,041.765 SHS DFA EMERGING MKTS SMALL	2,841,527	2,841,527
193,047.835 SHS DFA INTL VALUE PORT	3,955,550	3,955,550
50,000 SHS SPDR GOLD SHARES ETF	6,182,500	6,182,500
50,000 SHS VANECK VECTORS JR GOLD	1,706,500	1,706,500
70,000 SHS VANGUARD FTSE DEV MKTS	3,140,200	3,140,200
60,000 SHS VANGUARD FTSE EMER MKTS ETF	2,754,600	2,754,600
547 SHS ACCENTURE PLC IRELAND CL A	83,740	83,740
783 SHS ADOBE SYSTEMS INC	137,213	137,213
198 SHS ALPHABET INC CL A	208,573	208,573
511 SHS AMERICAN TOWER CORP	72,904	72,904
346 SHS AMERIPRISE FINANCIAL INC	58,637	58,637
575 SHS AMERISOURCEBERGEN CORP	52,797	52,797
163 SHS BLACKROCK INC	83,735	83,735
1,341 SHS COLGATE PALMOLIVE CO	99,141	99,141
1,785 SHS COMCAST CORP NEW CL A	71,489	71,489
544 SHS DANAHER CORP	50,494	50,494
523 SHS ECOLAB INC	70,176	70,176
695 SHS FACEBOOK CL A	122,640	122,640
460 SHS HOME DEPOT INC	87,184	87,184
862 SHS HONEYWELL INTL INC	132,196	132,196
705 SHS INTERCONTINENTALEXCHANGE GROUP	49,745	49,745
1,523 SHS INVESCO LTD	55,650	55,650
641 SHS LOWES COMPANIES INC	59,575	59,575

Name of Stock	End of Year Book Value	End of Year Fair Market Value
808 SHS MEDTRONIC PLC	65,246	65,246
1,058 SHS MODELEZ INTL INC.	45,282	45,282
269 SHS O REILLY AUTOMOTIVE INC	64,705	64,705
483 SHS PARKER HANNIFIN CORP	96,397	96,397
700 RED HAT INC	84,070	84,070
424 SHS ROCKWELL AUTOMATION INC NEW	83,252	83,252
1,090 SHS SCHLUMBERGER LTD NETHERLANDS ANTILLES	73,455	73,455
1,200 SHS STARBUCKS CORP	68,916	68,916
387 SHS THERMO FISHER SCIENTIFIC INC	73,484	73,484
670 SHS TJX COX INC NEW	51,228	51,228
569 SHS UNTD TECHNOLOGIES CORP	72,587	72,587
1,426 SHS VISA INC CL A	162,593	162,593
696 SHS WALT DISNEY CO	74,827	74,827
9,450 SHS AERCAP HOLDING NV	497,165	497,165
9,300 SHS AMERICAN INTL GROUP	554,094	554,094
21,350 SHS ARRIS INTERNATIONAL PLC	548,482	548,482
4,350 SHS CELEGENE CORP	453,966	453,966
2,800 SHS CHUBB LIMITED	409,164	409,164
16,150 SHS COMCAST CORPORATION	646,808	646,808
11,225 SHS COMMSCOPE HOLDINGS INC	424,642	424,642
18,175 SHS COVANTA HOLDING CORP	307,158	307,158
8,625 SHS DELTA AIR LINES INC	483,000	483,000
6,050 SHS DOWNDUPONT INC.	430,881	430,881
8,775 SHS EQT CORPORATION	499,473	499,473
5,275 SHS GILEAD SCIENCES INC	377,901	377,901
2,598 SHS JELD WEN HOLDING INC.	102,283	102,283
9,700 SHS KEYSIGHT TECH INC	403,520	403,520
14,300 SHS KONIKLIJKE PHILIPS	540,540	540,540
7,550 SHS LENNAR CORP CLASS A	477,462	477,462
9,575 SHS LIBERTY INTERACTV	519,348	519,348

Name of Stock	End of Year Book Value	End of Year Fair Market Value
13,575 SHS LIBERTY MEDIA CORP	463,722	463,722
6,450 SHS LKQ CORP	262,322	262,322
8,225 SHS METLIFE INC	415,856	415,856
10,400 SHS NORWEGIAN CRUISE LIN	553,800	553,800
4,050 SHS PACKAGING CORP OF AM	488,227	488,227
7,125 SHS QORVO INC	474,525	474,525
21,175 SHS SABRE CORPORATION	434,087	434,087
4,050 SHS SHIRE PLC	628,236	628,236
2,925 SHS SNAP ON INC.	509,827	509,827
11,000 SHS SYNCHRONY FINANCIAL	424,710	424,710
8,350 SHS TEMPUR SEALY INTL	523,461	523,461
11,226 SHS GAMING AND LEISURE PROPERTIES, INC	415,362	415,362
48,150 SHS SPIRIT REALTY CAPITA	413,127	413,127

TY 2017 Investments - Other Schedule**Name:** SHEAR FAMILY FOUNDATION INC**EIN:** 47-1833006**Investments Other Schedule 2**

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
CERBERUS VI PRIVATE INVESTORS	FMV	1,801,759	1,801,759
AXONIC CREDIT OPP OVERSEAS	FMV	111,037	111,037
BALYASNY	FMV	1,597,749	1,597,749
OAKTREE OPP DIRECT OFF	FMV	630,125	630,125
OAKTREE OPP DIRECT OFF CPV	FMV	60,000	60,000
506.30 SHS MESIROW ABSOL RTN FUND, LTD	FMV	491,947	491,947
AG DLI, LP	FMV	2,220,944	2,220,944
AG DLI II, LP	FMV	525,442	525,442
CEDAR STREET EMERGING MARKETS VALUE FUND, LP	FMV	2,925,110	2,925,110
CIRRUSCO	FMV	735,301	735,301
CORMORANT PRIV HEALTHCARE FD I LP	FMV	4,555,630	4,555,630
KAYNE ANDERSON REAL ESTATE DEBT II, L.P.	FMV	727,242	727,242
KAYNE ANDERSON REAL ESTATE DEBT, L.P.	FMV	3,595,228	3,595,228
IBEX BEHAVIORAL FINANCE FUND, LP	FMV	2,527,693	2,527,693
IBEX ISRAEL OPPORTUNITIES FUND II, LLLP	FMV	2,276,957	2,276,957
IBEX PARTNERS	FMV	32,026	32,026
ORBIMED ISRAEL PARTNERS II, LP	FMV	384,379	384,379
POINT 406 VENTURES 2016 OPPORTUNITIES FUND LP	FMV	1,476,794	1,476,794
KAIROS VP II AIV	FMV	85,714	85,714
KAYNE ANDERSON CORE RE	FMV	4,000,888	4,000,888
KAYNE ANDERSON RE PARTNERS V	FMV	358,652	358,652
MANIV MOBILITY	FMV	698,689	698,689
VELOCITY FUND PARTNERS	FMV	975,998	975,998
KAYNE PARTNERS FUND IV	FMV	354,667	354,667
KAIROS VP II	FMV	662,530	662,530
KKR AMERICAS XII (FREYA)	FMV	73,016	73,016
BLACKROCK ASIA-PACIFIC PCO	FMV	139,733	139,733
PRIDEROCK	FMV	1,502,867	1,502,867

TY 2017 Legal Fees Schedule**Name:** SHEAR FAMILY FOUNDATION INC**EIN:** 47-1833006

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL EXPENSES	2,587	2,587		0

TY 2017 Other Expenses Schedule**Name:** SHEAR FAMILY FOUNDATION INC**EIN:** 47-1833006**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BANK FEES	781	781		0
GRANT MANAGEMENT SOFTWARE EXPENSE	5,752	0		5,752
CHECK FEES	120	0		120

TY 2017 Other Income Schedule

Name: SHEAR FAMILY FOUNDATION INC

EIN: 47-1833006

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
PASSTHROUGH INCOME FROM K-1S	812,179	907,445	812,179

TY 2017 Other Increases Schedule

Name: SHEAR FAMILY FOUNDATION INC
EIN: 47-1833006

Description	Amount
UNREALIZED GAIN	14,644,966

TY 2017 Other Professional Fees Schedule**Name:** SHEAR FAMILY FOUNDATION INC**EIN:** 47-1833006

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT FEES	551,909	551,909		0
SFO MANAGEMENT FEES	510,000	0		510,000
INTERCOMPANY LEGAL/ACCOUNTING	140,931	140,931		0
OTHER PROFESSIONAL FEES	25,818	25,818		0

TY 2017 Taxes Schedule**Name:** SHEAR FAMILY FOUNDATION INC**EIN:** 47-1833006

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL EXCISE TAX	10,000	0		0
FOREIGN TAXES	10,719	10,719		0