

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing				
	2 Savings and temporary cash investments		1,996,588.	636,253.	636,253.
	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				
	10a Investments—U.S. and state government obligations (attach schedule)				
	b Investments—corporate stock (attach schedule) ATTM 2		370,944.	825,666.	1,060,864.
	c Investments—corporate bonds (attach schedule) ATTM 3			821,645.	819,708.
	11 Investments—land, buildings, and equipment: basis ▶ Less: accumulated depreciation (attach schedule) ▶				
	12 Investments—mortgage loans				
	13 Investments—other (attach schedule)				
	14 Land, buildings, and equipment: basis ▶ Less: accumulated depreciation (attach schedule) ▶				
	15 Other assets (describe ▶ ATTM 3)			2,786.	10,133.
	16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)		2,367,532.	2,286,350.	2,526,958.
Liabilities	17 Accounts payable and accrued expenses				
	18 Grants payable				
	19 Deferred revenue				
	20 Loans from officers, directors, trustees, and other disqualified persons				
	21 Mortgages and other notes payable (attach schedule)				
	22 Other liabilities (describe ▶)				
	23 Total liabilities (add lines 17 through 22)				
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26, and lines 30 and 31.				
	24 Unrestricted				
	25 Temporarily restricted				
	26 Permanently restricted				
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> 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		2,367,532.	2,286,350.	
	30 Total net assets or fund balances (see instructions)		2,367,532.	2,286,350.	
	31 Total liabilities and net assets/fund balances (see instructions)		2,367,532.	2,286,350.	

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	2,367,532.
2 Enter amount from Part I, line 27a	2	-81,182.
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	2,286,350.
5 Decreases not included in line 2 (itemize) ▶	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	2,286,350.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a 540 SH GENERAL ELECTRIC	P	02/09/2017	03/24/2017
b 90 SH SIMON PROPERTY GROUP	P	02/09/2017	03/17/2017
c 80 SH THERMO FISHER SCIENTIFIC	P	02/09/2017	03/24/2017
d 180 SH KRAFT HEINZ CO	P	02/09/2017	04/07/2017
e See Statement ATTM 5			

(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 16,048.		16,025.	23.
b 15,128.		16,386.	-1,258.
c 12,439.		12,354.	85.
d 16,400.		16,255.	145.
e 155,719.		156,291.	-572.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.

(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	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			23.
b			-1,258.
c			85.
d			145.
e			-572.

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	-1,577.
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	-1,577.

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No
 If "Yes," the foundation doesn't qualify under section 4940(e). Do not complete this part.

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2016	9,984.	1,999,882.	0.004992
2015	0.	197,491.	0.000000
2014			
2013			
2012			

2 Total of line 1, column (d)	2	0.004992
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years	3	0.002496
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	4	2,477,790.
5 Multiply line 4 by line 3	5	6,185.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	144.
7 Add lines 5 and 6	7	6,329.
8 Enter qualifying distributions from Part XII, line 4 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.	8	94,000.

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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 <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary—see instructions)				
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	144.	
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	144.	
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	144.	
6 Credits/Payments:				
a 2017 estimated tax payments and 2016 overpayment credited to 2017	6a			
b Exempt foreign organizations—tax withheld at source	6b			
c Tax paid with application for extension of time to file (Form 8868)	6c	499.		
d Backup withholding erroneously withheld	6d			
7 Total credits and payments. Add lines 6a through 6d	7	499.		
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8			
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9			
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	355.		
11 Enter the amount of line 10 to be: Credited to 2018 estimated tax 355. Refunded	11			

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?	Yes	No
1a		x
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition		x
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 distributed by the foundation in connection with the activities.		
c Did the foundation file Form 1120-POL for this year?		x
1c		x
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ 0 (2) On foundation managers. \$ 0		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS?		x
2		x
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 bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		x
3		x
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		x
4a		x
b If "Yes," has it filed a tax return on Form 990-T for this year?	N/A	
4b	N/A	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?		x
5		x
If "Yes," attach the statement required by <i>General Instruction T</i> .		
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	x	
6	x	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	x	
7	x	
8a Enter the states to which the foundation reports or with which it is registered. See instructions. OK		
8a		
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 <i>General Instruction G</i> ? If "No," attach explanation	x	
8b	x	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2017 or the tax year beginning in 2017? See the instructions for Part XIV. If "Yes," complete Part XIV		x
9		x
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		x
10		x

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Part VII-A Statements Regarding Activities (continued)

	Yes	No
11. At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions		X
12. Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions		X
13. Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	X	
14. The books are in care of ► NATALIE A. BONNEY Telephone no. ► (405) 348-7642 Located at ► 3408 DEER VALLEY EDMOND OK ZIP+4 ► 73034		
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 the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►		X

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

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

	Yes	No
1a. During the year, did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b. If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions Organizations relying on a current notice regarding disaster assistance, check here ► <input type="checkbox"/>	1b	N/A
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	X
2. Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)): a. At the end of tax year 2017, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2017? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.) 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____	2b	N/A
3a. Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No b. If "Yes," did it have excess business holdings in 2017 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2017.)	3b	N/A
4a. Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? b. Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2017?	4a	X
	4b	X

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

	Yes	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 4945(e))?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions	5b	N/A
Organizations relying on a current notice regarding disaster assistance, check here	<input type="checkbox"/>	
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?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If "Yes," attach the statement required by Regulations section 53.4945–5(d).		
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	6b	x
If "Yes" to 6b, file Form 8870.		
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	7b	N/A

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1 List all officers, directors, trustees, and foundation managers and their compensation. See instructions.**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (if not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NATALIE A. BONNEY 3408 DEER VALLEY EDMOND OK 73034	PRESIDENT 2.00	0.	0.	0.
JEFFREY A. BONNEY 3408 DEER VALLEY EDMOND OK 73034	SECRETARY 0.00	0.	0.	0.
PHILLIP A. BONNEY 3408 DEER VALLEY EDMOND OK 73034	VICE-PRESIDENT 0.00	0.	0.	0.
KYLE E. BONNEY 3408 DEER VALLEY EDMOND OK 73034	TREASURER 0.00	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	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over \$50,000 **0**

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3 Five highest-paid independent contractors for professional services. See instructions. If none, enter "NONE."**

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

Total number of others receiving over \$50,000 for professional services **0**

Part IX-A Summary of Direct Charitable Activities

N/A

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)

N/A

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	

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	1,336,576.
b	Average of monthly cash balances	1b	1,174,245.
c	Fair market value of all other assets (see instructions)	1c	4,702.
d	Total (add lines 1a, b, and c)	1d	2,515,523.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	2,515,523.
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	37,733.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,477,790.
6	Minimum investment return. Enter 5% of line 5	6	123,890.

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	123,890.
2a	Tax on investment income for 2017 from Part VI, line 5	2a	144.
b	Income tax for 2017. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	144.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	123,746.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	123,746.
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	123,746.

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	94,000.
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	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	94,000.
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	144.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	93,856.

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				123,746.
2 Undistributed income, if any, as of the end of 2017:				
a Enter amount for 2016 only			93,657.	
b Total for prior years: 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2017:				
a From 2012	0.			
b From 2013	0.			
c From 2014	0.			
d From 2015	0.			
e From 2016	0.			
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2017 from Part XII, line 4: ► \$ 94,000.				
a Applied to 2016, but not more than line 2a			93,657.	
b Applied to undistributed income of prior years (Election required—see instructions)				
c Treated as distributions out of corpus (Election required—see instructions)				
d Applied to 2017 distributable amount				343.
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).)				
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				
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				123,403.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required—see instructions)				
8 Excess distributions carryover from 2012 not applied on line 5 or line 7 (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	0.			
b Excess from 2014	0.			
c Excess from 2015	0.			
d Excess from 2016	0.			
e Excess from 2017	0.			

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

N/A

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 foundation 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				(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 $\frac{2}{3}$ 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 foundation 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).)

JEFFREY A. BONNEY

- 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.

N/A

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., to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions.

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

N/A

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

N/A

- c** Any submission deadlines:

N/A

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

N/A

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 Paid during the year				
SEE ATTM 4				94,000.
Total			▶	3a 94,000.
b Approved for future payment				
NONE				
Total			▶	3b 0.

Enter gross amounts unless otherwise indicated.

(See worksheet in line 13 instructions to verify calculations.)

[illegible]

Part XVII Information Regarding Transfers to and Transactions and Relationships With Noncharitable Exempt Organizations

		Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		
a	Transfers from the reporting foundation to a noncharitable exempt organization of:		
	(1) Cash	1a(1)	X
	(2) Other assets	1a(2)	X
b	Other transactions:		
	(1) Sales of assets to a noncharitable exempt organization	1b(1)	X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)	X
	(3) Rental of facilities, equipment, or other assets	1b(3)	X
	(4) Reimbursement arrangements	1b(4)	X
	(5) Loans or loan guarantees	1b(5)	X
	(6) Performance of services or membership or fundraising solicitations	1b(6)	X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c	X
d	If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.		

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

Sign Here	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.				
	<div style="border-bottom: 1px solid black; display: flex; align-items: center;"> <div style="flex: 1; text-align: center;"> </div> <div style="flex: 1; text-align: center;"> <div style="border-bottom: 1px solid black; display: inline-block; padding: 0 10px;">7-20-18</div> <div style="font-size: small;">Date</div> </div> <div style="flex: 1; text-align: center;"> <div style="border-bottom: 1px solid black; display: inline-block; padding: 0 10px;">PRESIDENT</div> <div style="font-size: small;">Title</div> </div> </div> <div style="font-size: small; margin-top: 5px;">Signature of officer or trustee</div>	May the IRS discuss this return with the preparer shown below? See instructions. <input type="checkbox"/> Yes <input type="checkbox"/> No			
Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
	Firm's name ▶ Self-Prepared			Firm's EIN ▶	Firm's address ▶
					Phone no.

STAMFORD VALLEY FOUNDATION
EIN 47-4811819
FORM 990-PF 12/31/17

Part I Analysis of Revenue and Expenses

	(a) Revenue and Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Disbursement for Charitable Purpose
<u>Line 16 c Other professional fees</u>				
Investment Advisory Fees	5,359	5,359		

Line 18 Taxes

Federal Excise Tax	16	0		
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Line 23 Other Expenses

IRS Filing Fee	850	850		
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STAMFORD VALLEY FOUNDATION
EIN 47-4811819
FORM 990-PF 12/31/17

Part II Balance Sheets

	Beginning of Year	End of Year	
	Book Value	Book Value	FMV
<u>Line 10b. Investments--Corporate Stock:</u>			
ABBOTT LABS		16,144	21,687
AMN ELEC POWER CO		12,100	13,978
COCA COLA COM		12,326	13,764
DEVON ENERGY CORP	370,944	370,944	529,920
DOWDUPONT INC COM		11,500	13,674
DOMINION ENERGY INC		11,603	12,970
DIGITAL RLTY TR INC		15,560	17,085
DISNEY (WALT) CO COM STK		12,047	11,826
EXXON MOBIL CORP COM		12,299	12,546
GOLDMAN SACHS GROUP INC		22,756	25,476
HONEYWELL INTL INC DEL		18,882	23,004
HOME DEPOT INC		12,433	17,058
INTEL CORP		18,037	23,080
JP MORGAN CHASE & CO		16,501	20,319
JOHNSON AND JOHNSON COM		11,403	13,972
METLIFE INC COM		14,039	15,168
MCDONALDS CORP COM		16,200	22,376
MICROSOFT CORP		12,123	16,253
NEXTERA ENERGY INC SHS		12,528	15,619
OCCIDENTAL PET CORP CAL		19,830	22,098
PHILIP MORRIS INTL INC		15,334	15,847
PFIZER INC		16,197	18,110
PROCTER & GAMBLE CO		11,515	11,944
SCHLUMBERGER LTD		23,920	20,217
TEXAS INSTRUMENTS		16,331	20,888
3M COMPANY		15,977	21,183
THERMO FISHER SCIENTIFIC INC		11,527	11,393
UNITEDHEALTH GROUP INC		16,625	22,046
US BANCORP		12,276	12,323
UNITED TECHS CORP COM		12,162	14,033
VERIZON COMMUNICATIONS COM		12,182	13,232
WAL-MART STORES INC		12,365	17,775
	370,944	825,666	1,060,864

STAMFORD VALLEY FOUNDATION
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Part II Balance Sheets

	Beginning of Year	End of Year	
	Book Value	Book Value	FMV
<u>Line 10c. Investments--Corporate Bonds:</u>			
BOSTON PROPERTIES INC 5.875%		53,176	52,706
HUMANA INC GLB 3.85%		20,327	20,801
INDIANA MICHIGAN POWER 7.0%		53,001	52,716
CITIGROUP INC GLB 6.125%		20,325	20,303
CONS EDISON CO OF NY 7.125%		52,451	52,126
DOMINION RESOURCES INC 5.2%		52,417	52,197
GOLDMAN SACHS GROUP IN GLB 5.25%		21,588	21,676
GENERAL MOTORS FINL CO 3.5%		51,138	50,754
GEORGIA POWER CO 1.95%		50,163	49,953
GOLDMAN SACHS GROUP INC 6.0%		54,112	54,061
JP MORGAN CHASE & CO 4.25%		21,024	20,970
LOCKHEED MARTIS CORP 1.85%		50,064	49,939
LINCOLN NATIONAL CORP 8.75%		54,993	54,593
MORGAN STANLEY SUBORDINATED 5.0%		21,418	21,885
MORGAN STANLEY SER GMTN 5.5%		53,142	52,985
NEXTERA ENERGY CAPITAL CO 2.7%		50,545	50,306
PRUDENTIAL FINANCIAL INC SER MTN 2.35%		50,396	50,033
SOUTHERN CO 2.450%		50,255	50,145
THERMO FISHER SCIENTIFIC 3.3%		20,256	20,468
WELLS FARGO & COMPANY SUBORDINATED 4.125%		20,854	21,091
	0	821,645	819,708

Line 15. Other Assets:

Accrued Interest Paid		2,786	
Accrued Interest Receivable			10,133
	0	2,786	10,133

STAMFORD VALLEY FOUNDATION
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Part XV Supplementary Information

Line 3a. Contributions paid during the year:

Recipient's name and address		Foundation Status	Purpose	Amount
Belay Global 1347 Hazeline Lake Dr Colorado Springs, CO 80921	N/A	501(c)(3)	General	2,000
Casa de la Esperanza Foundation 1136 E. Stuart, Ste 4203 Fort Collins, CO 80525	N/A	501(c)(3)	General	5,000
City Rescue Mission 800 W. California Oklahoma City, OK 73106	N/A	501(c)(3)	General	5,000
Fine Arts Institute PO Box 311 Edmond, OK 73083	N/A	501(c)(3)	General	500
Hope Center PO Box 2915 Edmond, OK 73083	N/A	501(c)(3)	General	500
Mayfair Church of Christ 2340 NW 50th St Oklahoma City, OK 73112	N/A	501(c)(3)	General	10,000
Oklahoma PEO Projects Fund, Inc. 6528 E 101 St, STE D-1 #465 Tulsa, OK 74133	N/A	501(c)(3)	General	15,000
OU Foundation - Stephenson Cancer Center 100 Timberdell Road Norman, OK 73019	N/A	501(c)(3)	General	5,000
Positive Tomorrows PO Box 61190 Oklahoma City, OK 73146	N/A	501(c)(3)	General	5,000
Regional Food Bank of Oklahoma PO Box 270968 Oklahoma City, OK 73137	N/A	501(c)(3)	General	10,000

STAMFORD VALLEY FOUNDATION
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Part XV Supplementary Information

Line 3a. Contributions paid during the year:

Recipient's name and address		Foundation Status	Purpose	Amount
Sharing Tree PO Box 891020 Oklahoma City, OK 73189	N/A	501(c)(3)	General	500
Special Care Inc. 12201 N. Western Ave Oklahoma City, OK 73114	N/A	501(c)(3)	General	5,000
The Salvation Army 1001 N. Pennsylvania Ave Oklahoma City, OK 73107	N/A	501(c)(3)	General	5,000
Tulsa Area United Way PO Box 1859 Tulsa, OK 74101	N/A	501(c)(3)	General	10,000
United Way of Central Oklahoma PO Box 837 Oklahoma City, OK 73101	N/A	501(c)(3)	General	10,000
Water 4 2405 NW 10th St Oklahoma City, OK 73107	N/A	501(c)(3)	General	5,000
YWCA 2460 NW 39th St Oklahoma City, OK 73112	N/A	501(c)(3)	General	500
				<u>94,000</u>

Form 990-PF: Return of Private Foundation

Part IV: Capital Gains and Losses for Tax on Investment Income

Continuation Statement

(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	(d) Date sold
20000 CELGENE CORP 1.9%	P	02/13/17	08/15/17
27 SH BRIGHTHOUSE FINL INC	P	02/09/17	08/09/17
160 SH CVS HEALTH CORP	P	02/09/17	10/10/17
50000 HUMANA INC 6.3%	P	03/17/17	12/29/17
20000 SH WELLPOINT INC	P	02/15/17	12/14/17
50000 SH GOLDMAN SACHS GROUP INC	P	03/17/17	12/15/17
(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)
20,000.		20,000.	0.
1,488.		1,709.	-221.
11,855.		12,206.	-351.
51,286.		51,286.	0.
21,090.		21,090.	0.
50,000.		50,000.	0.
155,719.	0.	156,291.	-572.
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	
			0.
			-221.
			-351.
			0.
			0.
			0.
0.	0.	0.	-572.

STAMFORD VALLEY FOUNDATION

EIN 47-4811819

FORM 990-PF 12/31/17

Election to Amortize Bond Premium

The taxpayer hereby elects to amortize bond premium pursuant to IRC Sec. 171(c) and Treasury Regulation 1.171-4(a).