

Return of Private Foundation or Section 4947(a)(1) Trust Treated as Private Foundation

OMB No 1545-0052

2017

Open to Public Inspection

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For calendar year 2017 or tax year beginning , 2017, and ending , 20

Name of foundation: WALTER AND JEAN BOEK GLOBAL AUTOIMMUNE INSTITUTE
Number and street (or P O box number if mail is not delivered to street address): 6819 ELM STREET
Room/suite: 10
City or town, state or province, country, and ZIP or foreign postal code: MCLEAN VA 22101
G Check all that apply: [] Initial return [] Initial return of a former public charity [] Final return [] Amended return [X] Address change [] Name change
H Check type of organization: [X] Section 501(c)(3) exempt private foundation [] Section 4947(a)(1) nonexempt charitable trust [] Other taxable private foundation
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 21,745,703.
J Accounting method: [X] Cash [] Accrual [] Other (specify)
A Employer identification number: 54-1075268
B Telephone number (see instructions): (703) 402-3745
C If exemption application is pending, check here []
D 1. Foreign organizations, check here []
2. Foreign organizations meeting the 85% test, check here and attach computation []
E If private foundation status was terminated under section 507(b)(1)(A), check here []
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 [X] if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	107,198.	107,198.	107,198.	
	4 Dividends and interest from securities	187,244.	187,244.	187,244.	
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)				
	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) See Stmt	23,492.			
	12 Total. Add lines 1 through 11	317,934.	294,442.	294,442.	
	13 Compensation of officers, directors, trustees, etc.	182,694.	36,539.	36,539.	109,616.
	14 Other employee salaries and wages	30,901.			
	15 Pension plans, employee benefits	13,258.			4,905.
	16a Legal fees (attach schedule)	53,418.	8,013.	8,013.	
	b Accounting fees (attach schedule)	6,855.	3,428.	3,428.	
	c Other professional fees (attach schedule)	13,874.			
	17 Interest	12,819.			
	18 Taxes (attach schedule) (see instructions) See Stmt	50,504.			
	19 Depreciation (attach schedule) and depletion	6,799.			
	20 Occupancy	74,118.			
	21 Travel, conferences, and meetings	50,283.			50,283.
	22 Printing and publications				
	23 Other expenses (attach schedule) See Stmt	248,249.			144,884.
	24 Total operating and administrative expenses. Add lines 13 through 23	743,772.	47,980.	47,980.	309,688.
	25 Contributions, gifts, grants paid	518,425.			518,425.
	26 Total expenses and disbursements. Add lines 24 and 25	1,262,197.	47,980.	47,980.	828,113.
	27 Subtract line 26 from line 12:				
a Excess of revenue over expenses and disbursements		-944,263.			
b Net investment income (if negative, enter -0-)			246,462.		
c Adjusted net income (if negative, enter -0-)				246,462.	

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	83,057.	50,400.	50,400.
	2	Savings and temporary cash investments	14,563,685.	3,250,244.	3,250,244.
	3	Accounts receivable ▶ 153,991.		153,991.	153,991.
		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)	7,786.	243,545.	243,545.
	b	Investments—corporate stock (attach schedule)	2,554,329.	14,254,281.	14,254,281.
	c	Investments—corporate bonds (attach schedule)	4,035,062.	2,112,567.	2,112,567.
	11	Investments—land, buildings, and equipment, basis ▶			
	Less: accumulated depreciation (attach schedule) ▶				
12	Investments—mortgage loans				
13	Investments—other (attach schedule)	0.			
14	Land, buildings, and equipment, basis ▶ 293,831.				
	Less: accumulated depreciation (attach schedule) ▶ 123,020.	177,611.	170,811.	1,680,675.	
15	Other assets (describe ▶)				
16	Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	21,421,530.	20,235,839.	21,745,703.	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons	813,201.	674,220.	
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ L-22 Stmt)	2,341,842.	1,377,529.	
	23	Total liabilities (add lines 17 through 22)	3,155,043.	2,051,749.	
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			
	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	18,266,487.	18,184,090.	
	30	Total net assets or fund balances (see instructions)	18,266,487.	18,184,090.	
31	Total liabilities and net assets/fund balances (see instructions)	21,421,530.	20,235,839.		

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	18,266,487.
2	Enter amount from Part I, line 27a	2	-944,263.
3	Other increases not included in line 2 (itemize) ▶ See Statement	3	861,866.
4	Add lines 1, 2, and 3	4	18,184,090.
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	18,184,090.

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			
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			
b			
c			
d			
e			

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			
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 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 doesn't qualify under section 4940(e). Do not complete this part.

(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	680,591.	23,125,459.	0.029430
2015			
2014			
2013			
2012			

2 Total of line 1, column (d)	2	0.029430
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	0.029430
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	4	22,211,019.
5 Multiply line 4 by line 3	5	653,670.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	2,465.
7 Add lines 5 and 6	7	656,135.
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	828,113.

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)		N/A	
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		1	2,465.
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	2,465.
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	2,465.
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	0.	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d		7	0.
8 Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached		8	68.
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	2,533.
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		10	0.
11 Enter the amount of line 10 to be: Credited to 2018 estimated tax		11	
Refunded			

	Yes	No
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?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the 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.		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ► \$ _____ (2) On foundation managers. ► \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$ _____		
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.		X
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
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
4b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by <i>General Instruction T</i> .		X
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
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	
8a Enter the states to which the foundation reports or with which it is registered. See instructions. ► DC		
8b 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	
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
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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 ▶ <u>www.autoimmuneinstitute.org</u>	x	
14 The books are in care of ▶ <u>SANDRA B. WERNESS</u> Telephone no. ▶ <u>(703) 402-3745</u> Located at ▶ <u>6819 ELM STREET STE 10 MCLEAN VA</u> ZIP+4 ▶ <u>22101</u>		
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?		x
See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ▶		

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

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

	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? . . . ☐ 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	1b	x
Organizations relying on a current notice regarding disaster assistance, check here ▶ ☐		
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2017?	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? ☐ 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	x
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2017?	4b	x

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 instructionsOrganizations 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

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? ☐ Yes ☒ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ Yes ☒ No

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? ☐ Yes ☒ No**b** If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ Yes ☒ No**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
SANDRA BOEK WERNESSE 10020 PARK ROYAL DRIVE GREAT FALLS VA 22066	PRESIDENT & CEO 70.00	182,694.	0.	0.
JEAN K BOEK 10020 PARK ROYAL DRIVE GREAT FALLS VA 22066	FORMER OFFICER 0.00	964,313.	0.	0.
ALFREDA JONES, M.D. 1008 BELLEVIEW RD MC LEAN VA 22102	TREASURER 5.00	0.	0.	0.
See Statement	2.00	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
WEBSTER, CHAMBERLAIN & BEAN LLP 1747 PENNSYLVANIA AVE NW STE 1000 WASHINGTON DC 20006	LEGAL SERVICES	51,176.

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 SEE STATEMENT A	306,173.
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	

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	16,274,954.
b	Average of monthly cash balances	1b	4,593,629.
c	Fair market value of all other assets (see instructions)	1c	1,680,675.
d	Total (add lines 1a, b, and c)	1d	22,549,258.
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	22,549,258.
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	338,239.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	22,211,019.
6	Minimum investment return. Enter 5% of line 5	6	1,110,551.

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	1,110,551.
2a	Tax on investment income for 2017 from Part VI, line 5	2a	2,465.
b	Income tax for 2017. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	2,465.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,108,086.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	1,108,086.
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	1,108,086.

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	828,113.
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	828,113.
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	2,465.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	825,648.

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				1,108,086.
2 Undistributed income, if any, as of the end of 2017:				
a Enter amount for 2016 only			472,418.	
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: ► \$ 828,113.			472,418.	
a Applied to 2016, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions)				
c Treated as distributions out of corpus (Election required—see instructions)				
d Applied to 2017 distributable amount				355,695.
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				752,391.
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	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 $\frac{2}{3}$ 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).)

NONE

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.

NONE

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:

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 Paid during the year				
CHILDREN'S NATIONAL MEDICAL CENTER 111 MICHIGAN AVE NW WASHINGTON DC 20010 FRIENDS OF LOWELL STREET		501C3	FUNDING OF COOPERATIVE PROGRAM	503,500.
				10,000.
CROHN'S AND COLITIS FOUNDATION 733 THIRD AVE STE 510 NEW YORK NY 10017		501C3	GENERAL SUPPORT	1,000.
THE ORDER OF ST. JOHNS 1850 M ST NW, STE 1070 WASHINGTON DC 20036		501C3	GENERAL SUPPORT	2,725.
CATHOLIC CHARITIES OF THE ARCHDIOCESE OF DC 924 G ST NW WASHINGTON DC 20001		501C3	GENERAL SUPPORT	600.
ARCS FOUNDATION 10221 RIVER RD POTOMAC MD 20859		501C3	GENERAL SUPPORT	500.
TUDOR PLACE FOUNDATION 1644 31ST ST NW WASHINGTON DC 20007		501C3	GENERAL SUPPORT	100.
Total			▶ 3a	518,425.
b Approved for future payment				
Total			▶ 3b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions.)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue					
a						
b						
c						
d						
e						
f						
g	Fees and contracts from government agencies					
2	Membership dues and assessments					
3	Interest on savings and temporary cash investments			14	107,198.	
4	Dividends and interest from securities			14	187,244.	
5	Net rental income or (loss) from real estate:					
a	Debt-financed property					
b	Not debt-financed property					
6	Net rental income or (loss) from personal property					
7	Other investment income					
8	Gain or (loss) from sales of assets other than inventory					
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue: a _____					
b	_____					
c	_____					
d	_____					
e	_____					
12	Subtotal. Add columns (b), (d), and (e)				294,442.	
13	Total. Add line 12, columns (b), (d), and (e)				13	294,442.

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

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

[illegible]

Form 990-PF: Return of Private Foundation**Part VIII: Information about Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** Continuation Statement

Name and address	Title, and average hours per week devoted to position	Compensation	Contributions to employee benefit plans and deferred compensation	Expense account, other allowances
SUSAN GERBER 1222 ALDEBARON DR1222 ALDEBARON DR MC LEAN, VA 22101	SECRETARY 1.00	0.	0.	0.
MARLENE BEKEY 4624 QUARTER CHARGE DR4624 QUARTER CHARGE DR ANNANDALE, VA 22003	GOVERNOR 1.00	0.	0.	0.
		0.	0.	0.

Name WALTER AND JEAN BOEK GLOBAL AUTOIMMUNE INSTITUTE		Employer Identification No 54-1075268	
Line 15 - Other Assets:	Beginning	End of Year	
	Year Book	Book	Fair Market
	Value	Value	Value

Line 22 - Other Liabilities:	Beginning Year Book Value	Ending Year Book Value
AMOUNT DUE UNDER EMPLOYMENT AGREEMENTS	2,341,842.	1,377,529.
Totals to Form 990-PF, Part II, line 22	2,341,842.	1,377,529.

Additional information from your 2017 Federal Exempt Tax Return**Form 990-PF: Return of Private Foundation****Information All Officers, Directors, Trustees, Foundation Managers and their Compensation (2)****Line 1c, Compensation****Itemization Statement**

Description	Amount
PAYMENT OF DEFERRED COMPENSATION ACCRUED IN PRIOR YEARS	964,313.
Total	964,313.

Walter and Jean Boek Global Autoimmune Institute
2017 Form 990-PF
EIN: 54-1075268
Statement A

Page 7, Part IX-A, Line 1:

The organization continued to partner with Children's National Health System to provide financial support and a variety of educational services to an underserved population of celiac disease patients, their families, physicians, medical providers, and the community at large. These resources included a Gluten Free Expo Education Day, live classes in nutrition and cooking, webinars, podcasts, and a mobile app: the Gluten Free Diet and Resource Center.

These educational materials are used in Children's National's GI Department's interdisciplinary clinic for celiac disease patients, which opened in 2017. In addition, the organization continued to expand its network in the international autoimmune disease community with the goal of developing and expanding its operations in the future.

Walter and Jean Boek Global Autoimmune Institute

EIN: 54-1075268

Schedule of Investments by Type

December 31, 2017

2017 Form 990-PF, Page 2

	Line 2	Line 10b	Line 10c	Line 10a	
Investment Account	Interest-Bearing Cash	Corporate Stocks & Mutual Funds	Corporate Bonds	US Government Bonds	Total
Wells Fargo Savings 7125	6,214				6,214
Wells Fargo Savings 2665	43,851				43,851
Morgan Stanley - 631-132575-070	3,158,687	1,196,521			4,355,208
RBC - 300-13732	8,665		4,880		13,545
Vanguard		421,026			421,026
Wells Fargo - 1331-0619	19,796	4,091,474		243,545	4,354,815
Alliance Bernstein	13,031	8,545,260	2,107,687		10,665,978
Totals	3,250,244	14,254,281	2,112,567	243,545	19,860,637

EIN 54-1075268

Walter and Jean Boek Global Autoimmune Institute
Schedule of Fixed Assets & Accumulated Depreciation
December 31, 2017
2017 Form 990-PF, Page 2

Description of Item	Date Placed in Service	Method	Life	Cost	12/31/14		12/31/15		12/31/16		12/31/17		12/31/18		Fair Market Value 12/31/2018
					Accumulated Depreciation	Depreciation Expense	Accumulated Depreciation	Depreciation Expense	Accumulated Depreciation	Depreciation Expense	Accumulated Depreciation	Depreciation Expense	Accumulated Depreciation	Depreciation Expense	
Children's Furniture	VAR	SL	5	17,500	10,500	3,500	14,000	3,500	17,500	3,500	21,000	3,500	24,500	3,500	1,680,000
5011 Lowell St Property	VAR	SL	40	77,742	77,742	-	77,742	-	77,742	-	77,742	-	77,742	-	1,680,000
Equipment	8/15/2013	SL	5	3,180	901	636	1,537	636	2,173	636	2,809	636	3,445	636	371
Equipment	1/30/2014	SL	5	1,399	256	280	536	280	816	280	1,095	280	1,375	280	304
Furniture	2/21/2014	SL	5	17,500	2,917	3,500	6,417	11,083	17,500	3,500	21,000	3,500	24,500	3,500	1,680,000
5011 Lowell St Remodeling	11/30/2016	SL	30	176,510	-	-	-	490	490	-	490	-	490	-	170,136
				293,831	92,316	7,916	100,232	15,989	116,221	6,799	123,020	6,799	129,819	6,799	1,680,675

Page 2, Part II Line 14

Page 2, Part II Line 14