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Form 990-PF

Department of the Treasury
Internal Revenue Service

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

Do not enter social security numbers on this form as it may be made public.

Information about Form 990-PF and its instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2017

Open to Public Inspection

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

Name of foundation
RAYMOND FAMILY FOUNDATION

A Employer identification number
56-6502391

Number and street (or P O box number if mail is not delivered to street address)
PO BOX 12475

Room/suite

B Telephone number (see instructions)
(888) 730-4933

City or town, state or province, country, and ZIP or foreign postal code
PORTLAND, OR 97212

C If exemption application is pending, check here

G Check all that apply

Initial return

Initial return of a former public charity

Final return

Amended return

Address change

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) \$ 19,979,734

J Accounting method

Cash

Accrual

Other (specify)

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

(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

4 Dividends and interest from securities

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

b Less Cost of goods sold

c Gross profit or (loss) (attach schedule)

11 Other income (attach schedule)

12 Total. Add lines 1 through 11

Operating and Administrative Expenses

13 Compensation of officers, directors, trustees, etc

14 Other employee salaries and wages

15 Pension plans, employee benefits

16a Legal fees (attach schedule)

b Accounting fees (attach schedule)

c Other professional fees (attach schedule)

17 Interest

18 Taxes (attach schedule) (see instructions)

19 Depreciation (attach schedule) and depletion

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses (attach schedule)

24 Total operating and administrative expenses. Add lines 13 through 23

25 Contributions, gifts, grants paid

26 Total expenses and disbursements. Add lines 24 and 25

27 Subtract line 26 from line 12

a Excess of revenue over expenses and disbursements

b Net investment income (if negative, enter -0-)

c Adjusted net income (if negative, enter -0-)

For Paperwork Reduction Act Notice, see instructions.

Cat No 11289X

Form 990-PF (2017)

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			
	2	Savings and temporary cash investments	234,040	188,816	188,816
	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)	0	186,095	184,911
	b	Investments—corporate stock (attach schedule)	0	9,567,214	16,045,587
	c	Investments—corporate bonds (attach schedule)	0	3,444,797	3,560,420
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	10,595,302	0	0
	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)	10,829,342	13,386,922	19,979,734	
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)	0	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			
	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	0	0	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	10,829,342	13,386,922	
30	Total net assets or fund balances (see instructions)	10,829,342	13,386,922		
31	Total liabilities and net assets/fund balances (see instructions) .	10,829,342	13,386,922		

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	10,829,342
2	Enter amount from Part I, line 27a	2	2,581,898
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	13,411,240
5	Decreases not included in line 2 (itemize) ▶ _____	5	24,318
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	13,386,922

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)
1 a PUBLICLY TRADED SECURITIES			
b PUBLICLY TRADED SECURITIES			
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 537,658		467,873	69,785
b 3,031,404		1,986,686	1,044,718
c			
d			
e			

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

(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	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			69,785
b			1,044,718
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	1,114,503
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	848,300	15,337,549	0 055309
2015	768,052	16,018,108	0 047949
2014	692,625	15,745,116	0 043990
2013	670,822	14,210,216	0 047207
2012	612,064	12,646,839	0 048397
2 Total of line 1, column (d)			2 0 242852
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 048570
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5			4 18,491,098
5 Multiply line 4 by line 3			5 898,113
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 15,823
7 Add lines 5 and 6			7 913,936
8 Enter qualifying distributions from Part XII, line 4			8 936,581

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	15,823
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	15,823
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	15,823
6	Credits/Payments		
a	2017 estimated tax payments and 2016 overpayment credited to 2017	6a	1,428
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	1,428
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	96
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	14,491
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	
11	Enter the amount of line 10 to be Credited to 2018 estimated tax ☐ Refunded ☐	11	

Part VII-A Statements Regarding Activities

	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?	1a	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? <i>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</i>	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? <i>If "Yes," attach a detailed description of the activities</i>	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? <i>If "Yes," attach a conformed copy of the changes</i>	3	No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	No
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T</i>	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? <i>If "Yes," complete Part II, col (c), and Part XV</i>	7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ UT		
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? <i>If "No," attach explanation</i> .	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)? <i>If "Yes," complete Part XIV</i>	9	No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i> 	10	Yes

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 ► DANI KERRIGAN Telephone no ► (888) 730-4933			

Located at **►** PO BOX 12475 PORTLAND OR ZIP+4 **►** 97212

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
WELLS FARGO BANK NA PO BOX 53456 MAC S3908-021 PHOENIX, AZ 85072	TRUSTEE 1 00	0	0	0
DANIELA MEGAN KERRIGAN PO BOX 53456 MAC S3908-021 PHOENIX, AZ 85072	DIRECTOR 1 00	0	0	0
ELIZABETH RAYMOND PO BOX 53456 MAC S3908-021 PHOENIX, AZ 85072	DIRECTOR 1 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	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
WELLS FARGO BANK NA 100 N MAIN ST MAC D4001-117 WINSTON SALEM, NC 27101	TRUSTEE	111,496

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	17,980,913
b	Average of monthly cash balances.	1b	791,775
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	18,772,688
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	18,772,688
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	281,590
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	18,491,098
6	Minimum investment return. Enter 5% of line 5.	6	924,555

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	924,555
2a	Tax on investment income for 2017 from Part VI, line 5.	2a	15,823
b	Income tax for 2017 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	15,823
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	908,732
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	908,732
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	908,732

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	936,581
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	936,581
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	15,823
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	920,758

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				908,732
2 Undistributed income, if any, as of the end of 2017				
a Enter amount for 2016 only.			680,288	
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 ▶ \$ 936,581				
a Applied to 2016, but not more than line 2a			680,288	
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.				256,293
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				652,439
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 XV **Supplementary Information** (continued)**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> See Additional Data Table				
Total			3a	908,750
b <i>Approved for future payment</i>				
Total			3b	0

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					
4	Dividends and interest from securities. . . .			14	551,534	
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			18	1,114,503	
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). .		0		1,666,037	0
13	Total. Add line 12, columns (b), (d), and (e).			13		1,666,037

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

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

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		Yes	No
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash.	1a(1)		No
(2) Other assets.	1a(2)		No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization.	1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization.	1b(2)		No
(3) Rental of facilities, equipment, or other assets.	1b(3)		No
(4) Reimbursement arrangements.	1b(4)		No
(5) Loans or loan guarantees.	1b(5)		No
(6) Performance of services or membership or fundraising solicitations.	1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c		No
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.			

(a) Line No	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (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

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.		
	*****	2018-05-14	*****
	Signature of officer or trustee	Date	Title

May the IRS discuss this return with the preparer shown below (see instr)? ☒ Yes ☐ No
--

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN
	SANG AHN				P00540880
	Firm's name ▶ MCDONALD JACOBS PC				Firm's EIN ▶ 93-0900579
Firm's address ▶ 520 SW YAMHILL ST STE 500 PORTLAND, OR 97204					Phone no (503) 227-0581

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>				
ACCESS INC 500 OFFICE CENTER DR SUITE 100 FORT WASHINGTON, PA 19034	NONE	PC	TO EMPOWER AND SERVE PEOPLE IN NEED OF SPECIALIZED SUPPORT	5,000
ADDICTION RECOVERY CENTER PO BOX 1182 CAMPBELL, CA 950091182	NONE	PC	TO PROVIDE THE OPPORTUNITY FOR INDIVIDUALS AND THEIR FAMILIES TO CHOOSE A HEALTHIER WAY OF LIFE	5,000
ADOPT-A-NATIVE-ELDER PROGRAM 328 WEST GREGSON AVENUE SALT LAKE CITY, UT 84115	NONE	PC	TO CREATE A BRIDGE OF HOPE BETWEEN NATIVE AMERICANS AND OTHER CULTURES	5,000
ALL SAINTS SCHOOL601 NE 39TH AVE PORTLAND, OR 97232	NONE	PC	TO CULTIVATE A UNIFIED FAITH-CENTERED COMMUNITY	30,000
APPALSHOP91 MADISON AVE WHITESBURG, KY 41858	NONE	PC	TO ENLIST THE POWER OF EDUCATION, MEDIA, THEATER, MUSIC AND OTHER ARTS	500
Total ► 3a				908,750

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>				
ARMY EMERGENCY RELIEF 2530 CRYSTAL DR SUITE 13161 ARLINGTON, VA 22202	NONE	PC	TO PROVIDE EMERGENCY FINANCIAL ASSISTANCE TO U S ARMY SOLDIERS (BOTH ACTIVE DUTY AND RETIREES)	5,000
BOSTON COLLEGE CADIGAN ALUMNI CENTER 140 COMMONWEA TH AVE CHESNUT HILL, MA 02467	NONE	PC	TO PROVIDE SCHOLARSHIPS	1,000
BRITT MUSIC & ARTS FESTIVAL 216 W MAIN ST MEDFORD, OR 97501	NONE	PC	TO PRESENT AND SPONSOR IN SOUTHERN OREGON PERFORMING ARTS OF THE HIGHEST QUALITY FOR THE EDUCATION	8,000
BUBBAVILLE INCPO BOX 6012 PORTLAND, OR 97228	NONE	PC	TO BRING NEW ENERGY TO THE OLD TIME MUSIC COMMUNITY	25,000
BUTTONWOOD FOUNDATION 11 WALL ST 21ST FL NEW YORK, NY 10005	NONE	PC	TO PROVIDE SCHOLARSHIPS, GRANTS AND HONORARIUM TO QUALIFYING COLLEGE STUDENTS OF NEW YORK STOCK EXCHANGE	5,000
Total ► 3a				908,750

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>				
CASA OF JACKSON COUNTY 409 N FRONT ST MEDFORD, OR 97501	NONE	PC	TO PROVIDE SPECIALLY TRAINED COMMUNITY VOLUNTEERS TO ADVOCATE FOR ABUSED AND NEGLECTED CHILDREN	25,000
CASTING FOR RECOVERY 109 E OAK ST SUITE 1G BOZEMAN, MT 59715	NONE	PC	TO ENHANCE THE QUALITY OF LIFE OF WOMEN WITH BREAST CANCER THROUGH A UNIQUE PROGRAM	2,500
CHEBEAGUE ISLAND LIBRARY 247 SOUTH RD UNIT 3 CHEBEAGUE ISLAND, ME 04017	NONE	PC	TO PROVIDE A WELCOMING CENTER TO FOSTER THE LEARNING OF THE ENTIRE ISLAND COMMUNITY	5,000
CHEBEAGUE ISLAND COUNCIL PO BOX 12 CHEBEAGUE ISLAND, ME 04017	NONE	PC	TO FUND AND MANAGE THE HEALTH CENTER	5,250
CHEBEAGUE ISLAND HISTORICAL SOCIETY PO BOX 28 CHEBEAGUE ISLAND, ME 04017	NONE	PC	TO RESEARCH AND RECORD THE PAST AND PRESENT HISTORY OF CHEBEAGUE ISLAND	1,000
Total ► 3a				908,750

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>				
CHEBEAGUE RECREATION CENTER 382 NORTH RD CHEBEAGUE ISLAND, ME 04017	NONE	PC	TO PROVIDE CHILDREN, TEENAGERS, ADULTS, AND SENIORS WITH A FACILITY IN WHICH THEY CAN PARTICIPATE	2,500
CHEBEAGUE UNITED METHODIST CHURCH 258 NORTH RD CHEBEAGUE ISLAND, ME 04017	NONE	PC	TO TEACH MORE ABOUT THE WAYS YOU CAN CONNECT WITH OUR CHURCH COMMUNITY	500
CHEMICAL EDUCATION FOUNDATION 1560 WILSON BLVD STE 1100 ARLINGTON, VA 22209	NONE	PC	TO FOSTER A GREATER UNDERSTANDING OF THE SCIENCE OF CHEMISTRY AND THE BENEFITS OF CHEMICALS	10,000
CHILDREN'S ADVOCACY CENTER 122 NE 47TH STREET NEWPORT, OR 97365	NONE	PC	TO OFFER CHILD ABUSE INTERVENTION AND ASSESSMENT SERVICES IN A SAFE, NEUTRAL AND SUPPORTIVE ENVIRONMENT	5,000
CHILDREN'S HEALING ART PROJECT 8065 SE GRAND AVE STE 160 PORTLAND, OR 97202	NONE	PC	TO BRING THE HEALING POWER OF ART TO CHILDREN AND FAMILIES FACING MEDICAL CHALLENGES	5,000
Total ► 3a				908,750

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>				
COMMUNITY HEALTH CENTER 110 S WOODLAND ST WINTER GARDEN, FL 34787	NONE	PC	TO PROVIDE QUALITY AND COMPASSIONATE PRIMARY HEALTHCARE SERVICES	5,000
COMMUNITY WORKS INC 168 NEWBURY STREET LAWRENCE, MA 01841	NONE	PC	TO PROVIDE COMMUNITY DEVELOPMENT	5,000
CRATERIAN PERFORMANCES 23 S CENTRAL AVE MEDFORD, OR 97501	NONE	PC	TO ENHANCE THE CULTURAL OPPORTUNITIES OF THE REGION AND INCREASE COMMUNITY PRIDE	1,500
FAMILY ASSISTANCE FOUNDATION 555 NORTH POINT CENTER EAST ALPHARETTA, GA 30022	NONE	PC	TO PROVIDE PRACTICAL SUPPORT INCLUDING CONNECTION TO FAMILY AND FRIENDS FOR EMOTIONAL SUPPORT	2,000
FAMILY SOLUTIONS 201 W MAIN ST STE 4B MEDFORD, OR 97501	NONE	PC	TO PROVIDE THE HIGHEST QUALITY AND COST EFFECTIVE MENTAL HEALTH SERVICES TO THE MOST VULNERABLE YOUTH	5,000
Total ► 3a				908,750

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>				
FIX OUR FERALSPO BOX 13083 BERKELEY, CA 94712	NONE	PC	TO HUMANELY END OVERPOPULATION OF CATS AND DOGS IN SAN FRANCISCO'S EAST BAY	15,000
FOREST PARK CONSERVANCY 210 NW 17TH AVE PORTLAND, OR 97209	NONE	PC	TO PROTECT AND FOSTER THE ECOLOGICAL HEALTH OF FOREST PARK	8,000
FRIENDS OF ANIMAL SHELTER PO BOX 1013 PHOENIX, OR 97535	NONE	PC	TO RECRUIT AND TRAIN VOLUNTEERS WHO WILL SAVE LIVES BY INCREASING PET ADOPTIONS AT THE JACKSON COUNTY	2,500
FRIENDS OF CALLIGRAPHY PO BOX 425194 SAN FRANCISCO, CA 94142	NONE	PC	TO ENCOURAGE INDIVIDUAL EXCELLENCE, TO FOSTER A WIDER APPRECIATION AND DEEPER UNDERSTANDING OF CALLIFORNIA	1,000
FRIENDS OF THE STRAND INC PO BOX 4186 MARIETTA, GA 30061	NONE	PC	TO PARTNER AND SERVE BY PROVIDING CULTURAL ENTERTAINMENT, PROGRAMS, AND MEETING SPACE THAT IS ACCESSIBLE	3,000
Total 3a				908,750

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>				
GMHC INC446 W 33RD ST 6TH FLOOR NEW YORK, NY 10004	NONE	PC	TO END THE AIDS EPIDEMIC AND UPLIFT THE LIVES OF ALL AFFECTED	10,000
GUIDING EYES FOR THE BLIND 611 GRANITE SPRINGS ROAD YORKTOWN HEIGHTS, NY 10598	NONE	PC	TO PROVIDE GUIDE DOGS TO PEOPLE WITH VISION LOSS	5,000
HEARTS WITH A MISSION 711 MEDFORD CENTER 334 MEDFORD, OR 97504	NONE	PC	TO SERVE HOMELESS, RUNAWAY, AND TRANSITIONAL YOUTH IN CRISIS BY PROVIDING SHELTER, EDUCATIONAL SUPPORT	5,000
HEIFER INTERNATIONAL1 WORLD AVE LITTLE ROCK, AR 72202	NONE	PC	TO BUILD AN ENDOWMENT TO GENERATE ONGOING SUPPORT FOR THE WORK OF HEIFER PROJECT INTERNATIONAL	10,000
ISLAND COMMONS RESOURCE CENTER 132 LITTLEFIELD RD CHEBEAGUE ISLAND, ME 04017	NONE	PC	TO SUPPOT OPERATION OF AN ADULT FAMILY CARE HOME FOR THE BENEFIT OF ELDERLY RESIDENTS OF CHEBEAGUE ISLAND	2,500
Total ► 3a				908,750

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>				
ISLAND INSTITUTE386 MAIN ST ROCKLAND, ME 04841	NONE	PC	TO SUSTAIN MAINE'S ISLAND AND REMOTE COASTAL COMMUNITIES, AND TO EXCHANGE IDEAS AND EXPERIENCES	5,000
JACKSON COUNTY LIBRARY 205 S CENTRAL AVE MEDFORD, OR 97501	NONE	PC	TO HELP BUILDING A VIBRANT LIBRARY SYSTEM THAT IS RECOGNIZED FOR THE EXCELLENCE OF ITS SERVICES	2,500
JACKSONVILLE SENIOR CENTER PO BOX 1346 JACKSONVILLE, OR 97530	NONE	PC	TO PROVIDE SERVICES TO SENIORS	3,000
JACKSONVILLE WOODLANDS PO BOX 1210 JACKSONVILLE, OR 97530	NONE	PC	TO PRESERVE FORESTED OPEN SPACE	5,000
JEFFERSON PUBLIC RADIO 1250 SISKIYOU BLVD ASHLAND, OR 97520	NONE	PC	TO FOSTER THE HUMAN INTELLECTUAL AND CREATIVE SPIRIT	4,000
Total ▶ 3a				908,750

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>				
JESUIT VOLUNTEER CORPS 801 ST PAUL STREET BALTIMORE, MD 21202	NONE	PC	TO CREATE A MORE JUST AND HOPEFUL WORLD, THE JESUIT VOLUNTEER CORPS ENGAGES PASSIONATE YOUNG PEOPLE	20,000
JVC NORTHWEST121 SW MORRISON ST PORTLAND, OR 97204	NONE	PC	TO RESPOND TO LOCAL COMMUNITY NEEDS IN THE PACIFIC NORTHWEST	20,000
KAIROS JACKSON SERVICES 1175 E MAIN ST MEDFORD, OR 97504	NONE	PC	TO COLLABORATE WITH YOUNG PEOPLE, FAMILIES, AND COMMUNITIES TO PROVIDE INTENSIVE MENTAL HEALTH SERVICES	5,000
KAIROSPDXPO BOX 12190 PORTLAND, OR 97212	NONE	PC	TO CLOSE THE RACIAL ACHIEVEMENT AND OPPORTUNITY GAPS	30,000
LAWRENCEVILLE FUND 2500 MAIN STREET LAWRENCEVILLE, NJ 08648	NONE	PC	TO MAKE A VALUABLE AND IMMEDIATE DIFFERENCE TO THE SCHOOL	2,500
Total 3a				908,750

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>				
LIVING OPPORTUNITIESPO BOX 1105 MEDFORD, OR 97501	NONE	PC	TO SUPPORT PEOPLE WITH INTELLECTUAL AND DEVELOPMENTAL DISABILITIES TO LIVE IN THE SAME NEIGHBORHOODS	5,000
MAGDALENE HOME7363 ROCKPOINT LN TYLER, TX 75703	NONE	PC	TO TEACH AND PREACH THE GOSPEL THROUGH SPEAKING ENGAGEMENTS	5,000
MARTHA O'BRYAN CENTER 711 SOUTH SEVENTH STREET NASHVILLE, TN 37206	NONE	PC	TO EMPOWER CHILDREN, YOUTH, AND ADULTS IN POVERTY TO TRANSFORM THEIR LIVES THROUGH WORK, EDUCATION	4,000
MASLOW PROJECT500 MONROE ST MEDFORD, OR 97501	NONE	PC	TO OFFER EVERY HOMELESS CHILD AND YOUTH THE PROBABILITY OF SUCCESS AND THE OPPORTUNITY	5,000
METROPOLITAN FAMILY SERVICE 1808 SE BELMONT ST PORTLAND, OR 97214	NONE	PC	TO PROVIDE AND MOBILIZE THE SERVICES NEEDED TO STRENGTHEN FAMILIES AND COMMUNITIES	15,000
Total 3a				908,750

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				
NATIONAL AUDUBON SOCIETY 225 VARICK STREET 7TH FLOOR NEW YORK, NY 10014	NONE	PC	TO SAVE BIRDS AND THEIR HABITATS THROUGHOUT THE AMERICA USING SCIENCE, ADVOCACY, AND EDUCATION	1,000
NEXSTAR LEGACY FOUNDATION 101 5TH ST E STE 2100 SAINT PAUL, MN 551011815	NONE	PC	TO PROVIDE FINANCIAL ASSISTANCE FOR PRIMARY AND CONTINUING EDUCATION IN TECHNICAL AND BUSINESS	10,000
OMSI1945 SOUTHEAST WATER AVENUE PORTLAND, OR 97214	NONE	PC	TO MAKE SCIENCE EXCITING AND RELEVANT THROUGH EXHIBITS, PROGRAMS, AND EXPERIENCES THAT ARE PRESENTED	10,000
ON TRACK300 W MAIN ST MEDFORD, OR 975012756	NONE	PC	TO EMPOWER INDIVIDUALS AND FAMILIES TO OVERCOME ADDICTION, POVERTY, AND SOCIAL STIGMA	5,000
OREGON HISTORICAL SOCIETY 1200 SOUTHWEST PARK AVENUE PORTLAND, OR 97205	NONE	PC	TO EDUCATE, INFORM, AND ENGAGE THE PUBLIC THROUGH COLLECTING, PRESERVING, AND INTERPRETING THE PAST	1,000
Total ► 3a				908,750

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>				
OREGON PUBLIC BROADCASTING 7140 SOUTHWEST MACADAM AVENUE PORTLAND, OR 97219	NONE	PC	TO GIVE VOICE TO THE COMMUNITY, CONNECTING OREGON AND ITS NEIGHBORS, ILLUMINATING A WIDER WORLD	5,000
OREGON SHAKESPEARE FESTIVAL 15 SOUTH PIONEER STREET ASHLAND, OR 97520	NONE	PC	TO REVEAL OUR COLLECTIVE HUMANITY THROUGH ILLUMINATING INTERPRETATIONS OF NEW AND CLASSIC PLAYS	10,000
PAW FUNDPO BOX 99485 EMERYVILLE, CA 946629486	NONE	PC	TO PROVIDE VETERINARY SERVICES, SPAY/NEUTER CLINICS, FOSTER AND ADOPTION SERVICE AND VACCINE/PET WELL	50,000
PAWS ADOPTION CENTERPO BOX 707 ROCKPORT, ME 04856	NONE	PC	TO PROVIDE A SAFE, CARING ENVIRONMENT FOR HOMELESS AND ABANDONED DOGS AND CATS	2,500
PETA501 FRONT STREET NORFOLK, VA 23510	NONE	PC	TO ESTABLISH AND PROTECT THE RIGHTS OF ALL ANIMALS	50,000
Total ► 3a				908,750

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>				
PLANNED PARENTHOOD123 WILLIAM ST NEW YORK, NY 10038	NONE	PC	TO PROVIDE COMPREHENSIVE REPRODUCTIVE AND COMPLEMENTARY HEALTH CARE SERVICES IN SETTINGS	10,000
PORTLAND PLAYHOUSE 602 NE PRESCOTT ST PORTLAND, OR 972113966	NONE	PC	TO SUPPORT THE DEVELOPMENT OF NEW PLAYS, EDUCATING YOUNG PEOPLE, AND REINVENTING THE MEANS	55,000
ROGUE RETREAT1410 W 8TH ST MEDFORD, OR 975012918	NONE	PC	TO PROVIDE TREATMENT, TRANSITIONAL HOUSING, VOCATIONAL DEVELOPMENT AND REFERRALS TO LOW INCOME INDIVIDUALS	5,000
ROGUE VALLEY DIST COUNCIL 155 N 1ST STREET CENTRAL POINT, OR 97502	NONE	PC	TO PROMOTE QUALITY OF LIFE	5,000
SAN FRANCISCO CHAMBER ORCHESTRA 601 VAN NESS AVENUE SUITE E-517 SAN FRANCISCO, CA 94102	NONE	PC	TO HELP MAKE CLASSICAL MUSIC ACCESSIBLE TO AUDIENCES OF ALL AGES AND BACKGROUNDS IN THE BAY AREA	150,000
Total ► 3a				908,750

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				
SANTA SABINA CENTER 25 MAGNOLIA AVE SAN RAFAEL, CA 94901	NONE	PC	TO PROVIDE SACRED SPACE IN A BEAUTIFUL ENVIRONMENT FOR GROUPS AND INDIVIDUALS TO EXPERIENCE CONTEMPL	10,000
SANCTUARY ONE 13195 UPPER APPLGATE ROAD JACKSONVILLE, OR 97530	NONE	PC	TO HELP PEOPLE, ANIMALS, AND THE EARTH WORK TOGETHER FOR MUTUAL HEALING	4,000
SCIENCE WORKS1500 E MAIN ST ASHLAND, OR 97520	NONE	PC	TO SUPPORT EDUCATING VISITORS IN SCIENCE AND TECHNOLOGY, WHILE PROVIDING AN ENTERTAINING DESTINATION	2,500
SOCIAL VENTURE PARTNERS 220 2ND AVENUE SOUTH SUITE 300 SEATTLE, WA 98104	NONE	PC	TO ENGAGE AND EDUCATE THE PORTLAND COMMUNITY IN VENTURE PHILANTHROPY, LEVERAGING TIME	10,000
SOLDIER'S BEST FRIEND 14505 N 75TH AVE PEORIA, AZ 853814702	NONE	PC	TO PROVIDE UNITED STATES MILITARY VETERANS LIVING WITH COMBAT-RELATED POST TRAUMATIC STRESS DISORDER	5,000
Total ► 3a				908,750

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				
SOUTHERN OREGON PUBLIC TELEVISION 28 S FIR ST STE 200 MEDFORD, OR 975012698	NONE	PC	TO PROVIDE ALTERNATIVE AND EDUCATIONAL TELEVISION PROGRAMMING	4,000
SOUTHERN OREGON HUMANE SOCIETY 2910 TABLE ROCK ROAD MEDFORD, OR 97501	NONE	PC	TO IMPROVE THE LIVES OF PETS AND PEOPLE THROUGH SUSTAINABLE PROGRAMS OF EDUCATION, SPAY/NEUTER	2,500
SOUTHERN OREGON LAND CONSERVANCY PO BOX 954 ASHLAND, OR 975200032	NONE	PC	TO DEDICATE TO THE PERMANENT PROTECTION OF FOREST, AGRICULTURAL, RIPARIAN, HISTORIC AND SCENIC LANDS	5,000
SOUTHERN UTAH WILDERNESS 425 EAST 100 SOUTH SALT LAKE CITY, UT 84111	NONE	PC	TO HELP THE PRESERVATION OF THE OUTSTANDING WILDERNESS AT THE HEART OF THE COLORADO PLATEAU,	5,000
STANFORD GRADUATE SCHOOL OF BUSINESS 655 KNIGHT WAY STANFORD, CA 94305	NONE	PC	TO PROVIDE SUPPROT TO SCHOOL	1,000
Total ► 3a				908,750

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 CHILDREN'S BOOK BANK 2680 SW RAVENSVIEW DR PORTLAND, OR 972011757	NONE	PC	TO ENSURE THAT CHILDRENS BOOKS GOT INTO THE HANDS OF KIDS WHO MIGHT NOT OTHERWISE HAVE BOOKS OF THEI	5,000
THE RECOMPENSE FUND 245 MAIN STREET ELLSWORTH, ME 04605	NONE	PC	TO BRING RESOURCES TO ISLAND NONPROFITS IN THEIR EFFORTS TO SUSTAIN CHEBEAGUE ISLAND AS YEAR-ROUND	85,000
TOWN OF CHEBEAGUE ISLAND RESCUE 192 NORTH ROAD CHEBEAGUE ISLAND, ME 04017	NONE	PC	TO SUPPORT THE RESCUERS	2,500
TOWN OF CHEBEAGUE ISLAND FIRE DEPARTMENT 192 NORTH ROAD CHEBEAGUE ISLAND, ME 04017	NONE	PC	TO SUPPORT THE FIREFIGHTERS	2,500
UNITED WAY OF JACKSON COUNTY 536 NORTH JACKSON STREET JACKSON, MI 49201	NONE	PC	TO IMPROVE LIVES IN JACKSON COUNTY BY MOBILIZING THE COMMUNITY TO MAKE LASTING CHANGE IN COMMUNITY	5,000
Total ► 3a	908,750			

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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>				
WORLD BICYCLE RELIEF 1000 WEST FULTON MARKET 4TH FLOOR CHICAGO, IL 60607	NONE	PC	TO MOBILIZE PEOPLE THROUGH THE POWER OF BICYCLES	10,000
WORLD WILDLIFE FUND 1250 24TH ST NW WASHINGTON, DC 20037	NONE	PC	TO CONSERVE THE WORLD'S MOST IMPORTANT FORESTS TO SUSTAIN NATURE'S DIVERSITY, BENEFIT OUR CLIMATE	2,500
WOUNDED WARRIORS PROJECT 4899 BELFORT ROAD SUITE 300 JACKSONVILLE, FL 32256	NONE	PC	TO HONOR AND EMPOWER WOUNDED WARRIORS	5,000
YMCA OF MEDFORD OREGON 522 W 6TH ST MEDFORD, OR 97501	NONE	PC	TO PUT CHRISTIAN PRINCIPLES INTO PRACTICE THROUGH PROGRAMS THAT BUILD HEALTHY SPIRIT, MIND AND BODY	2,500
YOUTH FOR CHRIST 10011 SE DIVISION ST 209 PORTLAND, OR 97266	NONE	PC	TO HELP TODAY'S YOUNG PEOPLE GET WHAT THEY REALLY NEED	5,000
Total 3a				908,750

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				
FAMILY NURTURING CENTER 212 N OAKDALE MEDFORD, OR 97501	NONE	PC	TO STRENGTHEN FAMILIES SO THAT CHILDREN CAN LIVE SAFELY AND DEVELOP FULLY IN THEIR PARENTS' CARE	2,500
Total ▶ 3a				908,750

TY 2017 Investments Corporate Bonds Schedule**Name:** RAYMOND FAMILY FOUNDATION**EIN:** 56-6502391**Investments Corporate Bonds Schedule**

Name of Bond	End of Year Book Value	End of Year Fair Market Value
EXXON MOBIL CORP	6,818	6,976
ISHARES IBONDS SEP 2018	29,235	29,224
ISHARES IBONDS SEP 2020	29,292	29,442
PUTNAM SHORT DURATION	504,769	504,766
ROYAL BANK OF CANADA	250,000	250,647
HSBC USA INC	250,000	244,477
CITIGROUP GLOBAL MARKETS	250,000	250,000
WELLS FARGO CORE BOND FUND	1,428,124	1,554,924
ISHARE 1-3 YEAR CREDIT BOND	696,559	689,964

TY 2017 Investments Corporate Stock Schedule

Name: RAYMOND FAMILY FOUNDATION
EIN: 56-6502391

Name of Stock	End of Year Book Value	End of Year Fair Market Value
1000 SHARES OF ADOBE SYSTEMS INC	33,521	175,240
859 SHARES OF ALLERGAN PLC	126,835	140,515
338 SHARES OF ALPHABET INC	128,040	353,683
405 SHARES OF AMAZON COM INC	38,032	473,635
2598 SHARES OF APPLE INC	65,680	439,660
10000 SHARES OF AT & T	364,134	388,800
3275 SHARES OF BB & T CORP	98,650	162,833
1037 BERKSHIRE HATHAWAY INC	91,460	205,554
9000 SHARES OF BANK OF AMERICA	129,704	265,680
902 SHARES OF BOEING CO	66,923	266,009
37 SHARES OF BLACKROCK INC	14,136	19,007
4000 SHARES OF BRISTOL MYERS SQUIBB	163,537	245,120
3315 CISCO SYSTEMS INC	88,605	126,965
1199 SHARES OF CHEVRON CORP	106,343	150,103
3311 CITIGROUP INC	126,775	246,372
2421 COCAL COLA CO	77,490	111,075
1500 COMCAST CORP	50,371	60,075
953 SHARES OF COSTCO WHOLESALE CORP	86,320	177,372
2000 SHARES OF CVS HEALTH CORP	155,857	145,000
1223 DANAHER CORP	55,371	113,519
189 SHARES OF DIAGEO PLC	20,047	27,600
2354 SHARES OF DOWDUPONT INC	97,835	167,652
1040 SHARES OF DUKE ENERGY	68,754	87,474
298 SHARES OF EATON CORP	18,069	23,545
1925 SHARES OF EXXON MOBIL CORP	116,869	161,007
459 SHARES OF FACEBOOK INC	45,532	80,995
615 SHARES OF FEDEX CORP	48,595	153,467
25000 SHARES OF FORD MOTOR	302,150	312,250
2645 SHARES OF GENERAL MOTORS	87,285	108,419
26091 SHARES OF GE CO.	138,685	455,288

Name of Stock	End of Year Book Value	End of Year Fair Market Value
500 SHARES OF GOLDMAN SACHS GROUP INC	94,851	127,380
2500 SHARES OF HALLIBURTON CO.	104,237	122,175
8000 SHARES OF HANEBRANDS INC	162,700	167,280
1097 SHARES OF HOME DEPOT	43,772	207,914
1224 SHARES OF HONEYWELL INTL	131,071	187,713
3455 SHARES OF INTEL CORP	80,229	159,483
665 SHARES OF IBM	79,343	102,024
1399 SHARES OF JOHNSON & JOHNSON	90,501	195,468
3356 SHARES OF JP MORGAN CHASE	141,220	358,891
197 SHARES OF MASTERCARD INC	18,534	29,818
197 SHARES OF MCDONALDS CORP	44,133	154,908
1400 SHARES OF MERCK & CO	70,965	78,778
4117 SHARES OF MICROSOFT	152,424	352,168
317 SHARES OF MOBILEYE	12,396	19,958
3256 SHARES OF MONDELEZ INTL INC	83,938	139,357
740 SHARES OIF MONSANTO	52,082	86,417
3025SHARES OF MORGAN STANLEY	72,245	158,722
203 SHARES OF NETFLIX INC	17,756	38,968
112 SHARES OF NEXTERA ENERGY INC	12,361	17,493
142 SHARES OF NVIDIA CORP	4,999	27,477
1776 SHARES OF OCCIDENTAL PETROLEUM	120,815	130,820
3390 SHARES OF ORACLE CORP	83,957	160,279
240 SHARES OF PALO ALTO NETWORKS	26,376	34,786
1330 SHARES OF PAYPAL HOLDINGS INC	25,614	97,915
960 SHARES OF PEPSICO	99,664	115,123
5000 SHARES OF PFIZER INC	132,890	181,100
1467 SHARES OF PHILLIPS 66	54,828	148,387
1000 SHARES OF PNC FINANCIAL SERVICES GROUP	52,286	144,290
1485 SHARES OF PROCTER & GAMBLE	101,484	136,442
189 SHARES OF PROOFPOINT INC	14,511	16,785

Name of Stock	End of Year Book Value	End of Year Fair Market Value
1570 SHARES OF QUALCOMM INC	78,810	100,511
1000 SHARES OF ROYAL CARIBBEAN CRUISES	24,901	119,280
351 SHARES OF SALESFORCE COM INC	22,882	35,883
343 SHARES PF SPLUNK INC	16,827	28,414
495 SHARES OF STARBUCKS CORP	16,016	28,428
558 SHARES OF STORE CAP CORP	13,686	14,530
172 SHARES OF STRYKER CORP	17,882	26,632
10000 SHARES OF SUNRUN INC	58,482	59,000
5000 SHARES OF SYNCHRONY FINL	143,711	193,050
3000 SHARES OF TARGET CORP	164,720	195,750
1000 SHARES OF UNION PACIFIC	27,069	134,100
1456 SHARES OF UNITEDHEALTH GROUP INC	58,294	320,990
1164 SHARES OF UNITED TECHNOLOGIES	87,889	148,491
5276 SHARES OF US BANCORP DEL	146,310	282,688
315 SHARES OF VALERO ENERGY CORP	18,032	28,952
3000 SHARES OF VERIZON COMM	119,898	158,790
246 SHARES OF VISA INC	18,286	28,049
1410 SHARES OF WAL MART STORES INC	61,599	139,238
1415 SHARES OF WALGREENS BOOTS ALLIANCE	51,233	102,757
1539 SHARES OF WALT DISNEY CO.	65,679	165,458
247 SHARES OF WELLS FARGO	11,374	14,985
40000 SHARES OF ALERIAN MLP ETF	458,240	431,600
9520 SHARES OF ISHARES MSCI	454,971	669,351
13974 SHARES OF AMERICAN FUNDS EUROPACIFIC	676,355	783,103
24902 SHARES OF WELLS FARGO DISCOVERY	650,238	873,308
15755 SHARES OF WELLS FARGO EMERGING	356,312	416,246
24954 SHARES OF WELLS FARGO INTRINSIC	553,731	803,770

TY 2017 Investments Government Obligations Schedule**Name:** RAYMOND FAMILY FOUNDATION**EIN:** 56-6502391**US Government Securities - End
of Year Book Value:**

0

**US Government Securities - End
of Year Fair Market Value:**

0

**State & Local Government
Securities - End of Year Book
Value:**

186,095

**State & Local Government
Securities - End of Year Fair
Market Value:**

184,911

TY 2017 Other Decreases Schedule

Name: RAYMOND FAMILY FOUNDATION
EIN: 56-6502391

Description	Amount
UNREALIZED LOSSES	24,318

TY 2017 Other Expenses Schedule**Name:** RAYMOND FAMILY FOUNDATION**EIN:** 56-6502391**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TRUSTEE FEES	111,326	83,494		27,831
ADMINISTRATIVE EXPENSES	211	211		0
ADR FEES	10	10		0

**TY 2017 Substantial Contributors
Schedule****Name:** RAYMOND FAMILY FOUNDATION**EIN:** 56-6502391**Name****Address**ELIZABETH K RAYMOND AND ROBERT RAYMOND JR CHARITABLE REMAINDER
UNITRUST2255 JOHNS PEAK ROAD
CENTRAL POINT, OR 97502

TY 2017 Taxes Schedule**Name:** RAYMOND FAMILY FOUNDATION**EIN:** 56-6502391

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	49	49		0

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF ▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990	OMB No 1545-0047 2017
	Name of the organization RAYMOND FAMILY FOUNDATION	Employer identification number 56-6502391

Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	☐ 501(c)() (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹ 3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. . . . ▶ \$ _____

Caution. An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization RAYMOND FAMILY FOUNDATION	Employer identification number 56-6502391
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Part I **Contributors** (See instructions) Use duplicate copies of Part I if additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	ELIZABETH K RAYMOND AND ROBERT RAYMOND JR CHARITABLE REMAINDER UNITRUST 2255 JOHNS PEAK ROAD CENTRAL POINT, OR 97502	\$ 1,936,307	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

56-6502391

Part II

Schedule B (Form 990, 990-EZ, or 990-PF) (2017)

Name of organization RAYMOND FAMILY FOUNDATION	Employer identification number 56-6502391
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Part III	Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ► \$ _____ Use duplicate copies of Part III if additional space is needed
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(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	