

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.
▶ Go to www.irs.gov/Form990PF for instructions and the latest information.

OMB No 1545-0052

2017

Open to Public Inspection

For calendar year 2017 or tax year beginning

, and ending

Name of foundation DONALD W & MARGARET M ANDERSON FOUNDATION, MARTHA A VAN DE VEN, TRUSTEE		A Employer identification number 65-6254236
Number and street (or P.O. box number if mail is not delivered to street address) 1765 MEDINA ROAD	Room/suite	B Telephone number 612-475-0787
City or town, state or province, country, and ZIP or foreign postal code LONG LAKE, MN 55356-9579		C If exemption application is pending, check here ☐
G Check all that apply: ☐ Initial return ☐ Final return ☒ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
H Check type of organization. ☐ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☒ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 4,796,605.	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 (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(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			N/A	
	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	71,479.	67,309.		STATEMENT 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	23,010.			
	b Gross sales price for all assets on line 6a	599,319.			
	7 Capital gain net income (from Part IV, line 2)		23,010.		
	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)					
11 Other income	796.	0.		STATEMENT 2	
12 Total Add lines 1 through 11	95,285.	90,319.			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	0.	0.		0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees	27,874.	27,874.		0.
	c Other professional fees	3,290.	1,645.		0.
	17 Interest				
	18 Taxes	2,333.	829.		0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses				
	24 Total operating and administrative expenses Add lines 13 through 23	33,497.	30,348.		0.
	25 Contributions, gifts, grants paid	295,000.			295,000.
26 Total expenses and disbursements Add lines 24 and 25	328,497.	30,348.		295,000.	
27 Subtract line 26 from line 12.					
a Excess of revenue over expenses and disbursements	-233,212.				
b Net investment income (if negative, enter -0-)		59,971.			
c Adjusted net income (if negative, enter -0-)			N/A		

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of year amounts only		
		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	98,706.	189,828.	189,828.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			2,185.
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	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			
	b Investments - corporate stock STMT 6	2,654,430.	2,326,020.	4,604,592.
	c Investments - corporate bonds			
	Liabilities	11 Investments - land, buildings and equipment basis ▶		
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other				
14 Land, buildings, and equipment basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		2,753,136.	2,515,848.	4,796,605.
17 Accounts payable and accrued expenses		9,621.	5,545.	
18 Grants payable				
19 Deferred revenue				
20 Loans from officers, directors, trustees, and other disqualified persons				
21 Mortgages and other notes payable				
22 Other liabilities (describe ▶)				
23 Total liabilities (add lines 17 through 22)	9,621.	5,545.		
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	4,026,688.	3,789,509.	
28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.		
29 Retained earnings, accumulated income, endowment, or other funds	-1,283,173.	-1,279,206.		
30 Total net assets or fund balances	2,743,515.	2,510,303.		
31 Total liabilities and net assets/fund balances	2,753,136.	2,515,848.		

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	2,743,515.
2 Enter amount from Part I, line 27a	2	-233,212.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	2,510,303.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	2,510,303.

Part IV Capital Gains and Losses for Tax on Investment Income SEE ATTACHED STATEMENT

(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	599,319.	576,309.	23,010.

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			23,010.

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	23,010.
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). If (loss), enter -0- in Part I, line 8		3	N/A

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

If "Yes," the foundation doesn't qualify under section 4940(e). Do not complete this part.

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2016	288,376.	4,207,556.	.068538
2015	298,268.	4,362,270.	.068374
2014	275,000.	4,342,457.	.063328
2013	242,000.	3,826,517.	.063243
2012	233,158.	3,536,333.	.065932

2 Total of line 1, column (d)	2	.329415
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	.065883
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	4	4,603,522.
5 Multiply line 4 by line 3	5	303,294.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	600.
7 Add lines 5 and 6	7	303,894.
8 Enter qualifying distributions from Part XII, line 4	8	295,000.

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	1,199.
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	1,199.
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	1,199.
6 Credits/Payments:			
a 2017 estimated tax payments and 2016 overpayment credited to 2017	6a	1,640.	
b Exempt foreign organizations - tax withheld at source	6b	0.	
c Tax paid with application for extension of time to file (Form 8868)	6c	0.	
d Backup withholding erroneously withheld	6d	0.	
7 Total credits and payments Add lines 6a through 6d	7	1,640.	
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	0.	
9 Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	441.	
11 Enter the amount of line 10 to be: Credited to 2018 estimated tax ☐ 441. Refunded ☐ 0.	11	0.	

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?		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. \$ 0. (2) On foundation managers. \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		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
b 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 General Instruction T		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. <u>WI</u>		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	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

N/A

Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	X	
14 The books are in care of ► MARTHA VAN DE VEN Telephone no. ► (612) 475-0787 Located at ► 1765 MEDINA WAY, LONG LAKE, MN ZIP+4 ► 55356-9579		
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 N/A		
16 At any time during calendar year 2017, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►		X

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

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

	Yes	No
1a During the year, did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ 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 N/A		
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2017?		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 ►		
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.) N/A		
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time 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.) N/A		
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		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?		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 instructions

N/A

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?

N/A

☐ 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?

6b

If "Yes" to 6b, file Form 8870.

X

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?

N/A

7b

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.**

(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
MARTHA VAN DE VEN	TRUSTEE			
1765 MEDINA RD				
LONG LAKE, MN 55356-9579	1.00	0.	0.	0.

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

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

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

0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 NONE	
	0.
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

	Amount
1 NONE	
	0.
2	
All other program-related investments. See instructions.	
3 NONE	
	0.
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	4,529,290.
b	Average of monthly cash balances	1b	144,336.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	4,673,626.
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	4,673,626.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	70,104.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	4,603,522.
6	Minimum investment return. Enter 5% of line 5	6	230,176.

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	230,176.
2a	Tax on investment income for 2017 from Part VI, line 5	2a	1,199.
b	Income tax for 2017. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	1,199.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	228,977.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	228,977.
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	228,977.

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	295,000.
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	295,000.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	295,000.

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				228,977.
2 Undistributed income, if any, as of the end of 2017				
a Enter amount for 2016 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2017:				
a From 2012	60,025.			
b From 2013	57,773.			
c From 2014	63,684.			
d From 2015	83,618.			
e From 2016	81,246.			
f Total of lines 3a through e	346,346.			
4 Qualifying distributions for 2017 from Part XII, line 4: ▶ \$	295,000.			
a Applied to 2016, but not more than line 2a			0.	
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				228,977.
e Remaining amount distributed out of corpus	66,023.			
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	412,369.			
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 instr.			0.	
f Undistributed income for 2017. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2018				0.
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	60,025.			
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a	352,344.			
10 Analysis of line 9:				
a Excess from 2013	57,773.			
b Excess from 2014	63,684.			
c Excess from 2015	83,618.			
d Excess from 2016	81,246.			
e Excess from 2017	66,023.			

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 Paid during the year				
AGRACE HOSPICECARE FOUNDATION 5395 E CHERYL PKWY FITCHBURG, WI 53711	N/A	PC	GENERAL OPERATING NEEDS	10,000.
ANDERSON VALLEY ANIMAL RESCUE PO BOX 188 BOONVILLE, CA 95415	N/A	PC	GENERAL OPERATING NEEDS	5,000.
BOYS & GIRLS CLUB OF DANE COUNTY 1818 WEST BELTLINE HWY MADISON, WI 53713	N/A	PC	GENERAL OPERATING NEEDS	5,000.
CHILDREN'S DYSLEXIA CENTER 301 WISCONSIN AVE MADISON, WI 53703	N/A	PC	GENERAL OPERATING NEEDS	5,000.
DANE COUNTY HUMANE SOCIETY 5132 VOGES RD MADISON, WI 53718	N/A	PC	GENERAL OPERATING NEEDS	2,500.
Total	SEE CONTINUATION SHEET(S)			295,000.
b Approved for future payment				
NONE				
Total				0.

Part XVI-A

[illegible]

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

Part XVI-B

[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 other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? | | Yes |
| a | Transfers from the reporting foundation to a noncharitable exempt organization of: | | |
| | (1) Cash | 1a(1) | |
| | (2) Other assets | 1a(2) | |
| b | Other transactions: | | |
| | (1) Sales of assets to a noncharitable exempt organization | 1b(1) | |
| | (2) Purchases of assets from a noncharitable exempt organization | 1b(2) | |
| | (3) Rental of facilities, equipment, or other assets | 1b(3) | |
| | (4) Reimbursement arrangements | 1b(4) | |
| | (5) Loans or loan guarantees | 1b(5) | |
| | (6) Performance of services or membership or fundraising solicitations | 1b(6) | |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees | 1c | |
| d | If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. | | |

[illegible]

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

- b** If "Yes," complete the following schedule.

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

**Sign
Here**

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

May the IRS discuss this return with the preparer shown below? See instr

☒ Yes ☐ No

Signature of officer or trustee

Date _____

Title

TRUSTEE

**Paid
Preparer
Use Only**

Print/Type preparer's name

Preparer's signature

Date

Check ☐ self-employed

PTIN

MELAINE BRANDT

MELAINE BRANDT

05/17/18

P00024023

Firm's name ► WIPFLI LLP

Firm's EIN ► 41-1944416

Firm's address ► PO BOX 8700
MADISON, WI 53708-8700

Phone no. 608.274.1980

Form **990-PF** (2017)

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	SCHLIMBERGER LTD ADR	P	02/08/17	11/29/17
b	SCHWAB CHARLES	P	02/08/16	02/08/17
c	DISNEY WALT CO	P	11/19/12	10/17/17
d	FISERV INC	P	09/04/13	02/08/17
e	GENERAL ELECTRIC	P	08/04/11	11/30/17
f	GENERAL ELECTRIC	P	08/05/11	11/30/17
g	GENERAL ELECTRIC	P	08/15/11	11/30/17
h	GENERAL ELECTRIC	P	09/14/11	11/30/17
i	MICROCHIP TECHNOLOGY	P	09/04/13	11/29/17
j	UNITED PARCEL SERVICE	P	06/25/13	02/08/17
k	ALLERGAN PLC INC	P	02/18/15	10/17/17
l	ALLERGAN PLC INC	P	11/19/15	10/17/17
m	ALLERGAN PLC INC	P	11/20/15	10/17/17
n				
o				

(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 74,883.		97,227.	-22,344.
b 31,615.		18,793.	12,822.
c 107,997.		52,692.	55,305.
d 26,987.		12,124.	14,863.
e 10,025.		9,240.	785.
f 12,523.		11,500.	1,023.
g 18,793.		16,712.	2,081.
h 12,523.		10,569.	1,954.
i 26,067.		10,546.	15,521.
j 106,156.		85,850.	20,306.
k 90,926.		127,093.	-36,167.
l 30,309.		45,433.	-15,124.
m 50,515.		78,530.	-28,015.
n			
o			

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) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			-22,344.
b			12,822.
c			55,305.
d			14,863.
e			785.
f			1,023.
g			2,081.
h			1,954.
i			15,521.
j			20,306.
k			-36,167.
l			-15,124.
m			-28,015.
n			
o			

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	23,010.
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). If (loss), enter "-0-" in Part I, line 8 }	3	N/A

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

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
DOMESTIC ABUSE INTERVENTION SERVICES 2102 FORDEM AVE MADISON, WI 53704	N/A	PC	GENERAL OPERATING NEEDS	10,000.
DOMESTIC ABUSE INTERVENTION SERVICES 2102 FORDEM AVE MADISON, WI 53704	N/A	PC	GENERAL OPERATING NEEDS	5,000.
EDGEWOOD COLLEGE 1000 EDGEWOOD COLLEGE DR MADISON, WI 53711	N/A	PC	GENERAL OPERATING NEEDS	5,000.
FIRST BAPTIST CHURCH 518 N FRANKLIN AVE MADISON, WI 53705	N/A	PC	GENERAL OPERATING NEEDS	10,000.
FIRST PRESBYTERIAN CHURCH OF NAPLES 250 6TH ST S NAPLES, FL 34102	N/A	PC	GENERAL OPERATING NEEDS	5,000.
FRIENDS OF WHA-TV 821 UNIVERSITY AVENUE MADISON, WI 53706	N/A	PC	GENERAL OPERATING NEEDS	1,000.
GEMMA OPEN DOOR FOR LITERACY 230 COMMERCIAL STREET BOSTON, MA 02109	N/A	PC	GENERAL OPERATING NEEDS	20,000.
GROVES ACADEMY 3200 MN-100 ST LOUIS PARK, MN 55416	N/A	PC	GENERAL OPERATING NEEDS	25,000.
HABITAT FOR HUMANITY OF COLLIER COUNTY INC 11145 TAMiami TRAIL E NAPLES, FL 34113	N/A	PC	GENERAL OPERATING NEEDS	50,000.
HABITAT FOR HUMANITY OF DANE CNTY INC 3101 LATHAM DRIVE MADISON, WI 53713	N/A	PC	GENERAL OPERATING NEEDS	10,000.
Total from continuation sheets				267,500.

DONALD W & MARGARET M ANDERSON
FOUNDATION, MARTHA A VAN DE VEN, TRUSTEE 65-6254236

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
INTERFAITH OUTREACH & COMMUNITY PARTNERS 1605 COUNTY RD 101 PLYMOUTH, MN 55447	N/A	PC	GENERAL OPERATING NEEDS	10,000.
LITTLE EAGLE ARTS FOUNDATION CHALET COMPLEX 412 1/2 WISCONSIN DELLS, WI 53965	N/A	PC	GENERAL OPERATING NEEDS	5,000.
MIDDLETON OUTREACH MINISTRY 3502 PARMENTER ST MIDDLETON, WI 53562	N/A	PC	GENERAL OPERATING NEEDS	1,000.
MONTELLO ENDOWMENT FOR EDUCATION INC 222 FOREST LN. MONTELLO, WI 53949	N/A	PC	GENERAL OPERATING NEEDS	5,000.
OPERATION FRESH START 1925 WINNEBAGO ST MADISON, WI 53704	N/A	PC	GENERAL OPERATING NEEDS	15,000.
ORONO PUBLIC SCHOOL DISTRICT 685 OLD CRYSTAL BAY RD N LONG LAKE, MN 55356	N/A	PC	GENERAL OPERATING NEEDS	15,000.
PAUL B CARBONE COMPREHENSIVE CANCER CNTR 600 HIGHLAND AVE MADISON, WI 53792	N/A	PC	GENERAL OPERATING NEEDS	10,000.
RIPON COLLEGE 300 SEWARD ST RIPON, WI 54971	N/A	PC	GENERAL OPERATING NEEDS	20,000.
RIPON COLLEGE 301 SEWARD ST RIPON, WI 54972	N/A	PC	GENERAL OPERATING NEEDS	2,000.
ST JUDE CHILDREN'S RESEARCH HOSPITAL 262 DANNY THOMAS PL MEMPHIS, TN 38105	N/A	PC	GENERAL OPERATING NEEDS	1,000.
Total from continuation sheets				

DONALD W & MARGARET M ANDERSON
FOUNDATION, MARTHA A VAN DE VEN, TRUSTEE 65-6254236

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)				
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)				
STOUGHTON AREA FOOD PANTRY 381 E. MAIN ST. STOUGHTON STOUGHTON, WI 53589	N/A	PC	GENERAL OPERATING NEEDS	2,500.
THE SALVATION ARMY 3030 DARBO DR MADISON, WI 53714	N/A	PC	GENERAL OPERATING NEEDS	1,000.
THE SALVATION ARMY 3031 DARBO DR MADISON, WI 53715	N/A	PC	GENERAL OPERATING NEEDS	1,000.
UNITED WAY OF COLLIER COUNTY INC 9015 STRADA STELL CT #204 NAPLES, FL 34109	N/A	PC	GENERAL OPERATING NEEDS	1,000.
UNIVERSITY OF WISCONSIN FDN- BADGER FUND 1848 UNIVERSITY AVE MADISON, WI 53726	N/A	PC	GENERAL OPERATING NEEDS	1,000.
UNIVERSITY OF WISCONSIN STOUT FOUNDATION 712 BROADWAY ST S MENOMONIE, WI 54751	N/A	PC	GENERAL OPERATING NEEDS	15,000.
VERY SPECIAL ARTS 1709 ABERG AVE MADISON, WI 53704	N/A	PC	GENERAL OPERATING NEEDS	1,000.
WISCONSIN ALZHEIMER'S INSTITUTE 7818 BIG SKY DR # 215 MADISON, WI 53719	N/A	PC	GENERAL OPERATING NEEDS	20,000.
Total from continuation sheets				

FORM 990-PF

DIVIDENDS AND INTEREST FROM SECURITIES

STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
SVA PLUMB TRUST COMPANY	71,479.	0.	71,479.	67,309.	
TO PART I, LINE 4	71,479.	0.	71,479.	67,309.	

FORM 990-PF

OTHER INCOME

STATEMENT 2

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
TAX REFUND	796.	0.	
TOTAL TO FORM 990-PF, PART I, LINE 11	796.	0.	

FORM 990-PF

ACCOUNTING FEES

STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	27,874.	27,874.		0.
TO FORM 990-PF, PG 1, LN 16B	27,874.	27,874.		0.

FORM 990-PF

OTHER PROFESSIONAL FEES

STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PLUMB MGMT FEES	3,290.	1,645.		0.
TO FORM 990-PF, PG 1, LN 16C	3,290.	1,645.		0.

FORM 990-PF

TAXES

STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAX PAID	829.	829.		0.
IRS TAXES	1,504.	0.		0.
TO FORM 990-PF, PG 1, LN 18	2,333.	829.		0.

FORM 990-PF

CORPORATE STOCK

STATEMENT 6

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
ALPHABET INC CL A	30,691.	100,073.
ALPHABET INC CL C	30,688.	99,408.
APPLE INC	49,087.	236,922.
AT&T INC	82,563.	77,760.
BRISTOL MYERS SQUIBB CO	117,758.	122,560.
CONTELLATION BRANDS INC CL A	46,904.	342,855.
DISCOVER FINANCIAL SVCS	133,165.	230,760.
EMERSON ELEC CO	34,846.	69,690.
ENBRIDGE INC	141,665.	156,440.
FISERVE INC	84,870.	229,478.
INTUTIVE SURGICAL INC	99,233.	218,964.
JOHNSON & JOHNSON	119,444.	167,664.
MASTERCARD INCORPORATED	121,157.	196,768.
MEDTRONIC PLC	118,134.	129,200.
MICROCHIP TECHNOLOGY INC	48,090.	175,760.
NXP SEMICONDUCTORS NV	141,571.	234,180.
PEPSICO INC	113,618.	215,856.
PRICELINE GROUP INC	234,834.	321,481.
PROCTER & GAMBLE CO	43,522.	128,632.
QUALCOMM INC	113,301.	128,040.
SCHWAB CHARLES CORP NEW	82,220.	179,795.
SYNCHRONY FINANCIAL	108,453.	189,691.
VISA INC	53,350.	273,648.
YUM CHINA HOLDING INC	111,889.	120,060.
3M CO	64,967.	258,907.
TOTAL TO FORM 990-PF; PART II, LINE 10B	2,326,020.	4,604,592.

Name Donald W & Margaret M Anderson Foundation, Martha A Van De Ven, Trustee
FEIN *****4236
Tax Year 2017

Reject Date 05/15/2018

Reject(s) applied to this return are as follows

Form 990-PF
Code F990PF-906-01
Taxing Authority Federal

Explanation

If Form 990-PF, Item G, "initial return of a former public charity" checkbox is not checked, then Item H, the type of organization checked must match data in the IRS database

Solution

Contact IRS help desk at 866 255-0654 to resolve database issues
