

Form **990-PF**  
 Department of the Treasury  
 Internal Revenue Service

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

OMB No 1545-0052

**2017**

**Open to Public Inspection**

▶ 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](http://www.irs.gov/form990pf).

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

Name of foundation EDWARDS CHARITABLE FOUNDATION		<b>A Employer identification number</b> 76-0502902	
% WESTWOOD TRUST			
Number and street (or P O box number if mail is not delivered to street address) 10000 MEMORIAL DRIVE Suite 650	Room/suite	<b>B Telephone number (see instructions)</b> (713) 683-7070	
City or town, state or province, country, and ZIP or foreign postal code HOUSTON, TX 77024		<b>C</b> If exemption application is pending, check here <input type="checkbox"/>	
<b>G</b> Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		<b>D 1.</b> Foreign organizations, check here <input type="checkbox"/> <b>2.</b> Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
<b>H</b> Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		<b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
<b>I</b> Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ 500,206		<b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
<b>J</b> Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis)			

<b>Part I Analysis of Revenue and Expenses</b> (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
<b>Revenue</b>	<b>1</b> Contributions, gifts, grants, etc., received (attach schedule)	0			
	<b>2</b> Check <input type="checkbox"/> if the foundation is <b>not</b> required to attach Sch B				
	<b>3</b> Interest on savings and temporary cash investments				
	<b>4</b> Dividends and interest from securities	10,654	10,654		
	<b>5a</b> Gross rents				
	<b>b</b> Net rental income or (loss)				
	<b>6a</b> Net gain or (loss) from sale of assets not on line 10	65,786			
	<b>b</b> Gross sales price for all assets on line 6a 243,403				
	<b>7</b> Capital gain net income (from Part IV, line 2)		65,786		
	<b>8</b> Net short-term capital gain				
	<b>9</b> Income modifications				
	<b>10a</b> Gross sales less returns and allowances				
<b>b</b> Less Cost of goods sold					
<b>c</b> Gross profit or (loss) (attach schedule)					
<b>11</b> Other income (attach schedule)	360	10			
<b>12 Total.</b> Add lines 1 through 11	76,800	76,450			
<b>Operating and Administrative Expenses</b>	<b>13</b> Compensation of officers, directors, trustees, etc	0			
	<b>14</b> Other employee salaries and wages				
	<b>15</b> Pension plans, employee benefits				
	<b>16a</b> Legal fees (attach schedule)				
	<b>b</b> Accounting fees (attach schedule)	5,136	2,568	0	2,568
	<b>c</b> Other professional fees (attach schedule)	3,309	1,678		1,631
	<b>17</b> Interest				
	<b>18</b> Taxes (attach schedule) (see instructions)	200	142		
	<b>19</b> Depreciation (attach schedule) and depletion				
	<b>20</b> Occupancy				
	<b>21</b> Travel, conferences, and meetings				
	<b>22</b> Printing and publications				
	<b>23</b> Other expenses (attach schedule)				
	<b>24 Total operating and administrative expenses.</b> Add lines 13 through 23	8,645	4,388	0	4,199
	<b>25</b> Contributions, gifts, grants paid	23,000			23,000
<b>26 Total expenses and disbursements.</b> Add lines 24 and 25	31,645	4,388	0	27,199	
<b>27</b> Subtract line 26 from line 12					
<b>a Excess of revenue over expenses and disbursements</b>	45,155				
<b>b Net investment income</b> (if negative, enter -0-)		72,062			
<b>c Adjusted net income</b> (if negative, enter -0-)					

<b>Part II Balance Sheets</b> Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	<b>1</b> Cash—non-interest-bearing . . . . .			
	<b>2</b> Savings and temporary cash investments . . . . .	13,798	5,781	5,781
	<b>3</b> Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____	0 16	0	
	<b>4</b> Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	<b>5</b> Grants receivable . . . . .			
	<b>6</b> Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .			
	<b>7</b> Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	<b>8</b> Inventories for sale or use . . . . .			
	<b>9</b> Prepaid expenses and deferred charges . . . . .			
	<b>10a</b> Investments—U S and state government obligations (attach schedule)			
	<b>b</b> Investments—corporate stock (attach schedule) . . . . .	235,160	272,962	343,022
	<b>c</b> Investments—corporate bonds (attach schedule) . . . . .	167,210	182,596	151,403
	<b>11</b> Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	<b>12</b> Investments—mortgage loans . . . . .			
	<b>13</b> Investments—other (attach schedule) . . . . .			
	<b>14</b> Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
<b>15</b> Other assets (describe ▶ _____)				
<b>16 Total assets</b> (to be completed by all filers—see the instructions Also, see page 1, item I)	416,184	461,339	500,206	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses . . . . .			
	<b>18</b> Grants payable . . . . .			
	<b>19</b> Deferred revenue . . . . .			
	<b>20</b> Loans from officers, directors, trustees, and other disqualified persons			
	<b>21</b> Mortgages and other notes payable (attach schedule) . . . . .			
	<b>22</b> Other liabilities (describe ▶ _____)			
	<b>23 Total liabilities</b> (add lines 17 through 22) . . . . .	0	0	
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow SFAS 117, check here</b> ▶ <input type="checkbox"/> <b>and complete lines 24 through 26 and lines 30 and 31.</b>			
	<b>24</b> Unrestricted . . . . .			
	<b>25</b> Temporarily restricted . . . . .			
	<b>26</b> Permanently restricted . . . . .			
	<b>Foundations that do not follow SFAS 117, check here</b> ▶ <input checked="" type="checkbox"/> <b>and complete lines 27 through 31.</b>			
	<b>27</b> Capital stock, trust principal, or current funds . . . . .	416,184	461,339	
	<b>28</b> Paid-in or capital surplus, or land, bldg , and equipment fund			
<b>29</b> Retained earnings, accumulated income, endowment, or other funds				
<b>30 Total net assets or fund balances</b> (see instructions) . . . . .	416,184	461,339		
<b>31 Total liabilities and net assets/fund balances</b> (see instructions) .	416,184	461,339		

**Part III Analysis of Changes in Net Assets or Fund Balances**

<b>1</b> 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) . . . . .	<b>1</b>	416,184
<b>2</b> Enter amount from Part I, line 27a . . . . .	<b>2</b>	45,155
<b>3</b> Other increases not included in line 2 (itemize) ▶ _____	<b>3</b>	
<b>4</b> Add lines 1, 2, and 3 . . . . .	<b>4</b>	461,339
<b>5</b> Decreases not included in line 2 (itemize) ▶ _____	<b>5</b>	
<b>6</b> Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	<b>6</b>	461,339

**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)
<b>1 a</b> WESTWOOD TRUST (SEE ATTACHED STMT)	P		
<b>b</b> WESTWOOD TRUST (SEE ATTACHED STMT)	P		
<b>c</b> WESTWOOD TRUST (SEE ATTACHED STMT)	P		
<b>d</b>			
<b>e</b>			

(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)
<b>a</b> 26,432		26,156	276
<b>b</b> 108,653		81,872	26,781
<b>c</b> 108,318		69,589	38,729
<b>d</b>			
<b>e</b>			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
<b>a</b>			276
<b>b</b>			26,781
<b>c</b>			38,729
<b>d</b>			
<b>e</b>			

<b>2</b> Capital gain net income or (net capital loss)	<b>2</b>	65,786
<b>3</b> 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	<b>3</b>	

**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	27,389	457,678	0.059843
2015	28,707	486,901	0.058959
2014	28,428	494,646	0.057471
2013	26,578	484,770	0.054826
2012	23,766	426,578	0.055713

<b>2</b> Total of line 1, column (d)	<b>2</b>	0.286812
<b>3</b> 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	<b>3</b>	0.057362
<b>4</b> Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	<b>4</b>	474,291
<b>5</b> Multiply line 4 by line 3	<b>5</b>	27,206
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)	<b>6</b>	721
<b>7</b> Add lines 5 and 6	<b>7</b>	27,927
<b>8</b> Enter qualifying distributions from Part XII, line 4	<b>8</b>	27,199

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)

Table with 11 rows for excise tax calculation. Includes sub-rows 6a-6d for credits. Total amount owed is 1,443.

Part VII-A Statements Regarding Activities

Table with 10 rows for activity statements. Columns include question number, Yes, and No. Includes questions about political campaigns, expenditures, and state reporting.

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 NONE 13 Yes
14 The books are in care of WESTWOOD TRUST Telephone no (713) 683-7070

Located at 10000 MEMORIAL DRIVE SUITE 650 HOUSTON TX ZIP+4 77024

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here . . . . . 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)
(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
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? If "Yes," list the years 20, 20, 20, 20 Yes No
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)

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

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

Table with 5 columns: (a) Name and address, (b) Title and average hours per week, (c) Compensation, (d) Contributions to employee benefit plans, (e) Expense account. Includes entries for Gary W Edwards, Margaret L Edwards, Debbie L Hance, and Christy L Hall.

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

Table with 5 columns: (a) Name and address of each employee paid more than \$50,000, (b) Title and average hours per week, (c) Compensation, (d) Contributions to employee benefit plans, (e) Expense account.

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

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

Table with 3 columns: (a) Name and address of each person paid more than \$50,000, (b) Type of service, (c) Compensation.

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

Part IX-A Summary of Direct Charitable Activities

Table with 2 columns: Description of activities and Expenses. Includes instructions to list the four largest direct charitable activities.

Part IX-B Summary of Program-Related Investments (see instructions)

Table with 2 columns: Description of investments and Amount. Includes instructions to describe the two largest program-related investments.

Total. Add lines 1 through 3.

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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
<b>a</b>	Average monthly fair market value of securities.	<b>1a</b>	461,353
<b>b</b>	Average of monthly cash balances.	<b>1b</b>	20,161
<b>c</b>	Fair market value of all other assets (see instructions).	<b>1c</b>	0
<b>d</b>	<b>Total</b> (add lines 1a, b, and c).	<b>1d</b>	481,514
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	<b>1e</b>	
<b>2</b>	Acquisition indebtedness applicable to line 1 assets.	<b>2</b>	0
<b>3</b>	Subtract line 2 from line 1d.	<b>3</b>	481,514
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	<b>4</b>	7,223
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4.	<b>5</b>	474,291
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5.	<b>6</b>	23,715

**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.)

<b>1</b>	Minimum investment return from Part X, line 6.	<b>1</b>	23,715
<b>2a</b>	Tax on investment income for 2017 from Part VI, line 5.	<b>2a</b>	1,441
<b>b</b>	Income tax for 2017 (This does not include the tax from Part VI).	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b.	<b>2c</b>	1,441
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1.	<b>3</b>	22,274
<b>4</b>	Recoveries of amounts treated as qualifying distributions.	<b>4</b>	
<b>5</b>	Add lines 3 and 4.	<b>5</b>	22,274
<b>6</b>	Deduction from distributable amount (see instructions).	<b>6</b>	
<b>7</b>	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	<b>7</b>	22,274

**Part XII Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
<b>a</b>	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26.	<b>1a</b>	27,199
<b>b</b>	Program-related investments—total from Part IX-B.	<b>1b</b>	0
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	<b>2</b>	0
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the		
<b>a</b>	Suitability test (prior IRS approval required).	<b>3a</b>	0
<b>b</b>	Cash distribution test (attach the required schedule).	<b>3b</b>	0
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	<b>4</b>	27,199
<b>5</b>	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).	<b>5</b>	
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4.	<b>6</b>	27,199

**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
<b>1</b> Distributable amount for 2017 from Part XI, line 7				22,274
<b>2</b> Undistributed income, if any, as of the end of 2017				
<b>a</b> Enter amount for 2016 only. . . . .			0	
<b>b</b> Total for prior years 2015, 2014, 2013		0		
<b>3</b> Excess distributions carryover, if any, to 2017				
<b>a</b> From 2012. . . . .	2,649			
<b>b</b> From 2013. . . . .	2,927			
<b>c</b> From 2014. . . . .	4,132			
<b>d</b> From 2015. . . . .	4,970			
<b>e</b> From 2016. . . . .	4,621			
<b>f</b> Total of lines 3a through e. . . . .	19,299			
<b>4</b> Qualifying distributions for 2017 from Part XII, line 4 ▶ \$ <u>27,199</u>				
<b>a</b> Applied to 2016, but not more than line 2a			0	
<b>b</b> Applied to undistributed income of prior years (Election required—see instructions). . . . .				
<b>c</b> Treated as distributions out of corpus (Election required—see instructions). . . . .				
<b>d</b> Applied to 2017 distributable amount. . . . .				22,274
<b>e</b> Remaining amount distributed out of corpus	4,925			
<b>5</b> Excess distributions carryover applied to 2017 (If an amount appears in column (d), the same amount must be shown in column (a) )				
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5	24,224			
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b . . . . .		0		
<b>c</b> 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. . . . .				
<b>d</b> Subtract line 6c from line 6b Taxable amount—see instructions . . . . .		0		
<b>e</b> Undistributed income for 2016 Subtract line 4a from line 2a Taxable amount—see instructions . . . . .			0	
<b>f</b> Undistributed income for 2017 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2018 . . . . .				0
<b>7</b> 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). . . . .				
<b>8</b> Excess distributions carryover from 2012 not applied on line 5 or line 7 (see instructions). . . . .	2,649			
<b>9</b> Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a . . . . .	21,575			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2013. . . . .	2,927			
<b>b</b> Excess from 2014. . . . .	4,132			
<b>c</b> Excess from 2015. . . . .	4,970			
<b>d</b> Excess from 2016. . . . .	4,621			
<b>e</b> Excess from 2017. . . . .	4,925			

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

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

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

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

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

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

**a** "Assets" alternative test—enter

**(1)** Value of all assets . . . . .

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

**b** "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . .

**c** "Support" alternative test—enter

**(1)** Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) . . . . .

**(2)** Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . . .

**(3)** Largest amount of support from an exempt organization

**(4)** Gross investment income

**Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see instructions.)**

**Part XV**

**1 Information Regarding Foundation Managers:**

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

**b** List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest  
NONE

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

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

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

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

**c** Any submission deadlines

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


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

Recipient	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)				
<b>a</b> <i>Paid during the year</i> See Additional Data Table				
<b>Total . . . . .</b> ▶ <b>3a</b>				23,000
<b>b</b> <i>Approved for future payment</i>				
<b>Total . . . . .</b> ▶ <b>3b</b>				





**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)				
<b>a</b> <i>Paid during the year</i>				
BILLINGSVILLE ELEMENTARY SCHOOL 124 SKYLAND AVENUE CHARLOTTE, NC 28205	NONE	PC	EDUCATIONAL GRANT	1,000
HOUSTON CENTER FOR LITERACY 2401 PORTSMOUTH ST HOUSTON, TX 77098	NONE	PC	EDUCATIONAL GRANT	500
YELLOWSTONE PARK FOUNDATION 222 EAST MAIN SUITE 301 BOZEMAN, MT 59715	NONE	PC	CHARITABLE GRANT	500
<b>Total</b> . . . . . 				23,000
<b>3a</b>				

**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)				
<b>a</b> <i>Paid during the year</i>				
SPRING BRANCH FAMILY DEVELOPMENT ATTN RICARDO BARNES EXECUTIVE DIR 8575 PITNER HOUSTON, TX 77080	NONE	PC	CHARITABLE GRANT	6,500
COMMUNITIES N SCHOOLS OF CHARLOTTE-MECKLENBURGINC 601 E FIFTH ST STE 300 CHARLOTTE, NC 28202	NONE	PC	EDUCATIONAL GRANT	500
MEMORIAL HIGH SCHOOL BAND BOOSTER CLUB 935 ECHO LANE HOUSTON, TX 77024	NONE	PC	EDUCATIONAL GRANT	1,000
<b>Total . . . . .</b> ▶ <b>3a</b>				23,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
SPRING BRANCH EDUCATION FOUNDATION 955 CAMPBELL ROAD HOUSTON, TX 77024	NONE	PC	EDUCATIONAL GRANT	500
MYERS PARK PRESBYTERIAN CHURCH YOUTH 2501 Oxford Place Charlotte, NC 28207	NONE	PC	EDUCATIONAL GRANT	500
SPRING SPIRIT BASEBALL PROGRAM INC 8526 PITNER ROAD HOUSTON, TX 77080	NONE	PC	CHARITABLE GIFT	3,500
<b>Total</b> . . . . . <b>3a</b>			▶	23,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
CHAPELWOOD UNITED METHODIST CHURCH 11140 GREENBAY ST HOUSTON, TX 77024	NONE	PC	CHARITABLE GRANT	500
TEACH FOR AMERICA 5855 EXECUTIVE CENTER DR 200 CHARLOTTE, NC 28212	NONE	PC	EDUCATIONAL GRANT	1,000
WORLD VISION INTERNATIONAL PO Box 9716 Federal Way, WA 98063	NONE	PC	CHARITABLE GRANT	500
<b>Total . . . . . ▶</b> <b>3a</b>				23,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
FORTRESS YOUTH DEVELOPMENT CENTER 712 STELLA ST FORT WORTH, TX 76104	NONE	PC	EDUCATIONAL GRANT	1,000
CHRIST CHURCH SCHOOL 3300 AUSTIN PARKWAY SUGAR LAND, TX 77479	NONE	PC	EDUCATIONAL GRANT	1,500
COMMUNITIES IN SCHOOLS OF HOUSTON 1235 NORTH LOOP WEST SUITE 300 HOUSTON, TX 77008	NONE	PC	EDUCATIONAL GRANT	2,500
<b>Total</b> . . . . . <b>3a</b>				23,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
SEARCH HOMELESS SERVICES 2015 CONGRESS AVENUE HOUSTON, TX 77002	NONE		CHARITABLE GRANT	500
FREEDOM SCHOOL PARTNERS 1030 AROSA AVENUE CHARLOTTE, NC 28203	NONE	PC	EDUCATIONAL GRANT	500
BIG BROTHERS BIG SISTERS OF GREATER CHARLOTTE 3801 E INDEPENDENCE BLVD CHARLOTTE, NC 28205	NONE	PC	CHARITABLE GRANT	500
<b>Total . . . . .</b> ▶ <b>3a</b>				23,000

**TY 2017 Accounting Fees Schedule****Name:** EDWARDS CHARITABLE FOUNDATION**EIN:** 76-0502902**Accounting Fees Schedule**

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
ERNST & YOUNG LLP	5,136	2,568		2,568

**TY 2017 All Other Program Related Investments Schedule****Name:** EDWARDS CHARITABLE FOUNDATION**EIN:** 76-0502902**Category****Amount**

NONE

**Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.**

## **TY 2017 Depreciation Schedule**

**Name:** EDWARDS CHARITABLE FOUNDATION

**EIN:** 76-0502902

**TY 2017 Investments Corporate Bonds Schedule****Name:** EDWARDS CHARITABLE FOUNDATION**EIN:** 76-0502902**Investments Corporate Bonds Schedule**

<b>Name of Bond</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
15000 AFLAC INC	0	0
35000 ASTRAZENECA PLC 1.95%	35,338	34,803
10000 CITIGROUP INC	10,176	10,293
10000 GOLDMAN SACHS 5.625%	0	0
15000 GOLDMAN SACHS 3.510%	15,166	15,861
30000 LEHMAN BROTHERS HLDS	29,736	0
25000 PEPSICO INC 2.25%	25,255	25,071
25000 VERIZON COMMUNICAT 2.45%	24,439	24,506
15000 WACHOVIA CAPITAL 5.569%	14,981	15,113
25000 WALMART STORES INC 3.25%	27,505	25,756

**TY 2017 Investments Corporate Stock Schedule****Name:** EDWARDS CHARITABLE FOUNDATION**EIN:** 76-0502902

<b>Name of Stock</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
50 SHS PEPSICO INC	0	0
75 SHS JOHNSON & JOHNSON	3,824	10,479
50 SHS 3M COMPANY	0	0
999.233 SHS VANGUARD TOTL INTL	0	0
513.989 SHS VANGUARD SMALL-CAP	0	0
125 SHS INTEL CORP	0	0
100 SHS VERIZON COMMUNICATIONS	0	0
25 SHS VISA INC	0	0
100 SHS ALTRIA GROUP	0	0
90 SHS EXXON MOBIL CORP	0	0
70 SHS APPLE COMPUTER	3,737	11,846
125 SHS CITIGROUP INC	0	0
75 SHS DOLLAR GENERAL	0	0
100 SHS CHURCH & DWIGHT CO INC	0	0
80 SHS DISCOVER FNL SERVICES	0	0
85 SHS BROADRIDGE FINL SOL IN	0	0
50/65 SHS HONEYWELL INTL INC	6,409	9,968
25 SHS INTERCONTINENTAL EX GRP	0	0
50 SHS PNC FINL SERVICES GR IN	0	0
200 SHS PFIZER CORP	0	0
10 SHS ALPHABET INC CLASS C	0	0
40 SHS ANHEUSER BUSCH INBEV SA	4,458	4,462
45/135 SHS CVS CAREMARK CORP	11,863	9,788
35/60 SH GENERAL DYNAMICS CORP	9,768	12,207
250 SHS GENERAL ELECTRIC CO	0	0
50/75 SHS HOME DEPOT INC	9,523	14,215
50 SHS TJX COMPANIES INC	0	0
150 SHS UNILEVER PLC SPONS ADR	0	0
50 SHS ABBVIE LABORATORIES	0	0
60/35 SHS ALBEMARLE CORP	2,830	4,476

<b>Name of Stock</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
120/360 SHS AT&T INC	14,323	13,997
390/485 SHS BANK OF AMERICA	8,942	14,317
20/45 SHS BECTON DICKINSON	7,947	9,633
140/160 SH BOOZ ALLEN HAMILTON	5,885	6,101
110 SHS BORGWARNER INC	0	0
30/85 SHS CHUBB LTD	11,178	12,421
70/345 SH COMCAST CORP CLASS A	12,551	13,817
20 SHS DIAMONDBACK ENERGY	0	0
50 SHS DR PEPPER SNAPPLE GROUP	4,524	4,853
40/55 SHS DTE ENERGY COMPANY	5,447	6,020
50 SHS FIDELITY NAT'L INFO SVC	0	0
160 SHS HORMEL FOODS INC	5,634	5,822
100 SHS ORACLE CORPORATION	0	0
50 SHS PARSLEY ENERGY	0	0
50 SHS SCHLUMBERGER LTD	0	0
10/35 SHS SHERWIN WILLIAMS	10,489	14,351
70/105 SHS TEXAS INSTRUMENTS	7,817	10,966
100/140 SH WISCONSIN ENERGY GR	8,570	9,300
195 SHS ABBOTT LABS	8,518	11,129
230 SHS AIA GROUP LTD	5,480	7,844
6 SHS AMAZON.COM INC	4,934	7,017
90 SHS AMDOCS LTD	5,467	5,893
135 SHS AMERICAN INT'L GROUP	8,732	8,043
330 SHS CAP GEMINI	5,760	7,837
105 SHS EOG RESOURCES	9,733	11,331
40 SHS FACEBOOK INC	5,265	7,058
180 SHS HALLIBURTON COMPANY	8,528	8,797
175 SHS HOSTESS BRANDS INC	2,848	2,592
300 SHS INTERFACE INC	5,493	7,545
35 SHS LITTLEFUSE INC	5,585	6,924

<b>Name of Stock</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
135 SH NIPPON TELEG & TEL CORP	6,441	6,353
100 SHS PAYPAL HOLDINGS INC	4,069	7,362
35 SHS RAYTHEON COMPANY	5,471	6,575
285 SHS SAMSONITE INT'L	4,974	6,544
180 SHS TAIWAN SEMICONDUCTOR	5,536	7,137
50 SHS UNION PACIFIC CORP	5,506	6,705
30 SHS UNITED HEALTH GROUP INC	4,829	6,614
65 SHS ZOETIS INC	4,074	4,683

**TY 2017 Other Income Schedule****Name:** EDWARDS CHARITABLE FOUNDATION**EIN:** 76-0502902**Other Income Schedule**

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
OTHER INCOME - SECURITIES LITIGATON	10	10	
OTHER INCOME - FEDERAL TAX REFUND	350		

**TY 2017 Other Professional Fees Schedule****Name:** EDWARDS CHARITABLE FOUNDATION**EIN:** 76-0502902

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
FIDUCIARY FEES	3,262	1,631		1,631
OTHER INVESTMENT EXPENSES	47	47		

**TY 2017 Taxes Schedule****Name:** EDWARDS CHARITABLE FOUNDATION**EIN:** 76-0502902

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
FOREIGN TAXES PAID	142	142		
FEDERAL TAXES PAID	58			