

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.

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

Name of foundation THE OSHERENKO-YOUNG FOUNDATION		A Employer identification number 95-6093625	
Number and street (or P O box number if mail is not delivered to street address) Room/suite PO BOX 22508		B Telephone number (see instructions) (805) 965-7737	
City or town, state or province, country, and ZIP or foreign postal code SANTA BARBARA, CA 931212508		C If exemption application is pending, check here <input type="checkbox"/>	
G 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		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
H 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		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ 416,778		J 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)	
		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)	19,913			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	7	7		
	4 Dividends and interest from securities	3,767	3,767		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	2,364			
	b Gross sales price for all assets on line 6a 13,607				
	7 Capital gain net income (from Part IV, line 2)		2,364		
	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)	200	0			
12 Total. Add lines 1 through 11	26,251	6,138			
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 (attach schedule)				
	b Accounting fees (attach schedule)	2,990	0		0
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	7,188	0		0
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	109	0		0
	24 Total operating and administrative expenses. Add lines 13 through 23	10,287	0		0
	25 Contributions, gifts, grants paid	115,630			115,630
26 Total expenses and disbursements. Add lines 24 and 25	125,917	0		115,630	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	-99,666				
b Net investment income (if negative, enter -0-)		6,138			
c Adjusted net income (if negative, enter -0-)					

Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing		1	1
	2 Savings and temporary cash investments	222,106	117,448	117,448
	3 Accounts receivable ▶ _____ 196			
	Less allowance for doubtful accounts ▶ _____	196	196	196
	4 Pledges receivable ▶ _____			
	Less allowance for doubtful accounts ▶ _____			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ _____			
	Less allowance for doubtful accounts ▶ _____			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments—U S and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)	175,347	180,338	299,133
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment basis ▶ _____			
Less accumulated depreciation (attach schedule) ▶ _____				
12 Investments—mortgage loans				
13 Investments—other (attach schedule)				
14 Land, buildings, and equipment basis ▶ _____				
Less accumulated depreciation (attach schedule) ▶ _____				
15 Other assets (describe ▶ _____)				
16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	397,649	297,983	416,778	
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 ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	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	397,649	297,983		
30 Total net assets or fund balances (see instructions)	397,649	297,983		
31 Total liabilities and net assets/fund balances (see instructions) .	397,649	297,983		

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	397,649
2 Enter amount from Part I, line 27a	2	-99,666
3 Other increases not included in line 2 (itemize) ▶ _____	3	0
4 Add lines 1, 2, and 3	4	297,983
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	297,983

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 WALT DISNEY	P		2017-03-01
b NORDSTROM	P		2017-03-01
c CAPITAL GAINS DIVIDENDS	P		
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 6,392		5,595	797
b 5,128		5,648	-520
c 2,087			2,087
d			
e			

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	
a			797
b			-520
c			2,087
d			
e			

2 Capital gain net income or (net capital loss)	2	2,364
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	67,177	358,479	0.187395
2015	73,673	37,221	1.979340
2014	51,018	28,795	1.771766
2013	55,520	49,244	1.127447
2012	51,521	35,558	1.448929

2 Total of line 1, column (d)	2	6.514877
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	1.302975
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	4	434,817
5 Multiply line 4 by line 3	5	566,556
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	61
7 Add lines 5 and 6	7	566,617
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions	8	115,630

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	1	123
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	123
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	123
6	Credits/Payments		
a	2017 estimated tax payments and 2016 overpayment credited to 2017	6a	4,720
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	4,720
8	Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> 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	4,597
11	Enter the amount of line 10 to be Credited to 2018 estimated tax ▶ 160 Refunded ▶	11	4,437

Part VII-A Statements Regarding Activities

	Yes	No
1a		No
b		No
c		No
d		
e		
2		No
3		No
4a		No
b		
5		No
6	Yes	
7	Yes	
8a		
b	Yes	
9		No
10		No

Part VII-A Statements Regarding Activities (continued)

Table with 3 columns: Question, Yes, No. Rows 11-14 regarding controlled entities, donor advised funds, public inspection requirements, and books in care.

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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.

Table with 3 columns: Question, Yes, No. Row 16 regarding interest in foreign countries.

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.

Main table with 3 columns: Question, Yes, No. Rows 1a-4b regarding Form 4720 exceptions and requirements.

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

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

Part VIII

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).

Table with 5 columns: (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. Includes entries for GAIL OSHERENKO and ORAN YOUNG.

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 devoted to position, (c) Compensation, (d) Contributions to employee benefit plans and deferred compensation, (e) Expense account, other allowances.

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".

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. 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

Table with 2 columns: Description of activities, Expenses. Includes entry 1 NOT APPLICABLE.

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

Table with 2 columns: Description of investments, Amount. Includes entry 1 NOT APPLICABLE.

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	267,380
b	Average of monthly cash balances.	1b	173,863
c	Fair market value of all other assets (see instructions).	1c	196
d	Total (add lines 1a, b, and c).	1d	441,439
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	441,439
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	6,622
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	434,817
6	Minimum investment return. Enter 5% of line 5.	6	21,741

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	21,741
2a	Tax on investment income for 2017 from Part VI, line 5.	2a	123
b	Income tax for 2017 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	123
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	21,618
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	21,618
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	21,618

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	115,630
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	115,630
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	115,630

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				21,618
2 Undistributed income, if any, as of the end of 2017				
a Enter amount for 2016 only.			0	
b Total for prior years 20___, 20___, 20___		0		
3 Excess distributions carryover, if any, to 2017				
a From 2012.	50,121			
b From 2013.	54,374			
c From 2014.	50,602			
d From 2015.	75,900			
e From 2016.	53,961			
f Total of lines 3a through e.	284,958			
4 Qualifying distributions for 2017 from Part XII, line 4 ▶ \$ <u>115,630</u>				
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.				21,618
e Remaining amount distributed out of corpus	94,012			
5 Excess distributions carryover applied to 2017 (If an amount appears in column (d), the same amount must be shown in column (a))				0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	378,970			
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				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 (see instructions).	50,121			
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a	328,849			
10 Analysis of line 9				
a Excess from 2013.	54,374			
b Excess from 2014.	50,602			
c Excess from 2015.	75,900			
d Excess from 2016.	53,961			
e Excess from 2017.	94,012			

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)

	Tax year	Prior 3 years			(e) Total
	(a) 2017	(b) 2016	(c) 2015	(d) 2014	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c "Support" alternative test—enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 Information Regarding Foundation Managers:

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

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

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 e-mail address of the person to whom applications should be addressed

GAIL OSHERENKO
853 VIA GRENADA
SANTA BARBARA, CA 93103
(805) 886-1182

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

NO SPECIAL FORMAT REQUIRED INCLUDE INFORMATION ON REQUESTING AGENCY AND PURPOSE FOR REQUEST

c Any submission deadlines

NONE

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

NONE

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i> See Additional Data Table				
Total ▶ 3a				115,630
b <i>Approved for future payment</i>				
Total ▶ 3b				0

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>				
ALASKA CONSERVATION FDN 911 W 8TH AVE ANCHORAGE, AK 99501		PUBLIC CHARITY	GENERAL	250
AMNESTY INTERNATIONAL 5 PENN PLAZA NEW YORK, NY 10001		PUBLIC CHARITY	GENERAL	2,500
CALIFORNIA STATE PARKS FOUNDATION 50 FRANCISCO STREET SUITE 110 SAN FRANCISCO, CA 94133		PUBLIC CHARITY	GENERAL	750
CENTER FOR URBAN AGRICULTURE 5982 FAIRVIEW AVE GOLETA, CA 93117		PUBLIC CHARITY	GENERAL	500
CLARINA HOWARD NICOLS CENTER PO BOX 517 MORRISVILLE, VT 05661		PUBLIC CHARITY	GENERAL	800
Total 3a				115,630

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 ARTS MUSIC ASSOCIATION 2060 ALAMEDA PADRE SERRA SANTA BARBARA, CA 93103		PUBLIC CHARITY	GENERAL	1,500
COMMUNITY ENVIRONMENTAL COUNCIL 26 WEST ANAPAMU STREET SANTA BARBARA, CA 93101		PUBLIC CHARITY	GENERAL	500
COMMUNITY FOR BETTER ENVIRONMENT 6325 PACIFIC BLVD 300 HUNTINGTON PARK, CA 90255		PUBLIC CHARITY	GENERAL	250
CONSERVATION LAW FOUNDATION 62 SUMMER STREET BOSTON, MA 02110		PUBLIC CHARITY	GENERAL	2,000
COPLEY HEALTH SYSTEM 528 WASHINGTON HWY MORRISVILLE, VT 05661		PUBLIC CHARITY	GENERAL	1,000
Total 3a				115,630

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>				
COTTAGE HOSPITAL REHABILITATION FDN 2415 DE LA VINA ST SANTA BARBARA, CA 93105		PUBLIC CHARITY	GENERAL	250
DEETJENS BIG SUR PRESERVATION FUND 48865 HIGHWAY 1 BIG SUR, CA 93920		PUBLIC CHARITY	GENERALGENERALGENERAL	500
EARTHJUSTICE50 CALIFORNIA ST SAN FRANCISCO, CA 94111		PUBLIC CHARITY	GENERAL	1,000
ENVIRONMENTAL DEFENSE CENTER 906 GARDEN STREET SANTA BARBARA, CA 93101		PUBLIC CHARITY	GENERAL	10,500
FIGGE ART MUSEUM225 W 2ND ST DAVENPORT, IA 52801		PUBLIC CHARITY	GENERAL	5,000
Total ▶ 3a				115,630

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>				
FOOD BANK 1525 STATE ST SANTA BARBARA, CA 93101		PUBLIC CHARITY	GENERAL	1,250
FOOD FROM THE HEART PO BOX 3908 SANTA BARBARA, CA 93130		PUBLIC CHARITY	GENERAL	450
FRIENDS OF THE EARTH 1101 15TH ST NW 11TH FLOOR WASHINGTON, DC 20005		PUBLIC CHARITY	GENERAL	300
GET OIL OUT PO BOX 23625 SANTA BARBARA, CA 93121		PUBLIC CHARITY	GENERAL	200
GREEN MOUNTAIN CLUB 4711 WATERBURY-STOWE ROAD WATERBURY CENTER, VT 05677		PUBLIC CHARITY	GENERAL	400
Total 3a				115,630

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>				
HABITAT FOR HUMANITY 6860 CORONA DRIVE GOLETA, CA 93117		PUBLIC CHARITY	GENERAL	500
HARDWICK FOOD PANTRY 39 W CHURCH ST HARDWICK, VT 05843		PUBLIC CHARITY	GENERAL	1,000
HEAL THE OCEAN1430 CHAPALA ST SANTA BARBARA, CA 93101		PUBLIC CHARITY	GENERAL	250
HENRY KENDALL SOCIETY OF CONCERNED SCIENTISTS 2 BRATTLE SQUARE CAMBRIDGE, MA 02138		PUBLIC CHARITY	GENERAL	1,500
INTERNATIONAL PLANNED PARENTHOOD 125 MAIDEN LANE 9TH FLOOR NEW YORK, NY 100384730		PUBLIC CHARITY	GENERAL	500
Total 3a				115,630

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>				
KCLU60 WOLSEN RD 4400 THOUSAND OAKS, CA 91360		PUBLIC CHARITY	GENERAL	500
KPFK - THE PACIFICA FOUNDATION 1925 MARTIN LUTHER KING JR WAY BERKELEY, CA 947041037		PUBLIC CHARITY	GENERAL	250
LAMOILLE FAMILY CENTER 480 CADYS FALLS ROAD MORRISTOWN, VT 05661		PUBLIC CHARITY	GENERAL	250
LAND TRUST FOR SANTA BARBARA COUNTY PO BOX 91830 SANTA BARBARA, CA 93190		PUBLIC CHARITY	GENERAL	1,300
LEAGUE OF WOMEN VOTERS EDUCATION FUND 328 EAST CARRILLO STREET SUITE A SANTA BARBARA, CA 93101		PUBLIC CHARITY	GENERAL	1,000
Total 3a				115,630

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>				
LOS ANGELES MUSIC CENTER 135 N GRAND AVENUE LOS ANGELES, CA 90012		PUBLIC CHARITY	GENERAL	800
LOS ANGELES PHILHARMONIC ASSOC 151 S GRAND AVE LOS ANGELES, CA 90012		PUBLIC CHARITY	GENERAL	500
LOS BANOS DEL MAR POOL 401 SHORELINE DRIVE SANTA BARBARA, CA 93109		PUBLIC CHARITY	GENERAL	100
LOS PADRES FOREST WATCH PO BOX 831 SANTA BARBARA, CA 93102		PUBLIC CHARITY	GENERAL	1,500
LOS PADRES FOUNDATION PO BOX 305 NASSAU, DE 19969		PUBLIC CHARITY	GENERAL	2,500
Total ▶				115,630
3a				


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>				
MARINE APPLIED RESEARCH & EXPLORATION 1230 BRICKYARD COVE RD RICHMOND, CA 94801		PUBLIC CHARITY	GENERAL	500
MARINE CONSERVATION INSTITUTE 4010 STONE WAY NORTH SUITE 210 SEATTLE, WA 98103		PUBLIC CHARITY	GENERAL	30,500
MARLBORO COLLEGEPO BOX A MARLBORO, VT 05344		PUBLIC CHARITY	GENERAL	500
MARSHALL PROJECT156 N 56TH ST NEW YORK, NY 10019		PUBLIC CHARITY	GENERAL	500
MONTEVERDI MUSIC SCHOOL 46 BARRE ST MONTPELIER, VT 05602		PUBLIC CHARITY	GENERAL	1,000
Total ▶ 3a				115,630

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>				
NATIONAL PARK FOUNDATION 1201 EYE STREET NW SUITE 550B WASHINGTON, DC 20005		PUBLIC CHARITY	GENERAL	950
NATIONAL WILDLIFE FOUNDATION 11100 WILDLIFE CENTER DRIVE RESTON, VA 201905362		PUBLIC CHARITY	GENERAL	250
NRDC40 W 20TH ST NEW YORK, NY 10011		PUBLIC CHARITY	GENERAL	1,000
OCEAN CONSERVATIONPO BOX 12860 MARINA DEL REY, CA 90295		PUBLIC CHARITY	GENERAL	100
PACIFIC ENVIRONMENT473 PINE ST SAN FRANCISCO, CA 94104		PUBLIC CHARITY	GENERAL	12,500
Total 3a				115,630

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>				
PARTNERS IN HEALTH 888 COMMONWEALTH AVE 3RD FLOOR BOSTON, MA 02215		PUBLIC CHARITY	GENERAL	2,000
PESTICIDE ACTION NETWORK 1611 TELEGRAPH AVE SUITE 1200 OAKLAND, CA 94612		PUBLIC CHARITY	GENERAL	250
PLANNED PARENTHOOD - NEW ENGLAND 128 LAKESIDE AVE SUITE 301 BURLINGTON, VT 05401		PUBLIC CHARITY	GENERAL	1,500
PLANNED PARENTHOOD - SANTA BARBARA SAN LUIS OBISPO VENTURA 518 GARDEN ST SANTA BARBARA, CA 931011606		PUBLIC CHARITY	GENERAL	750
PRINCIPIA UPPER SCHOOL 13201 CLAYTON ROAD ST LOUIS, MO 93131		PUBLIC CHARITY	GENERAL	250
Total 				115,630
3a				

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>				
RAIN FOREST ACTION NETWORK 425 BUSH STREET SUITE 300 SAN FRANCISCO, CA 94108		PUBLIC CHARITY	GENERAL	500
RED CROSS2707 STATE ST SANTA BARBARA, CA 93105		PUBLIC CHARITY	GENERAL	900
RIVER ARTSPO BOX 829 MORRISVILLE, VT 05661		PUBLIC CHARITY	GENERAL	500
RURAL VERMONT 15 BARRE STREET SUITE 2 MONTPELIER, VT 05602		PUBLIC CHARITY	GENERAL	250
SAFE ARTPO BOX 251 CHELSEA, VT 05038		PUBLIC CHARITY	GENERAL	4,230
Total 3a				115,630


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

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Name and address (home or business)				
a <i>Paid during the year</i>				
SANTA BARBARA AUDUBON SOCIETY PO BOX 5508 SANTA BARBARA, CA 93150		PUBLIC CHARITY	GENERAL	500
SANTA BARBARA COMMUNITY ACTION NETWORK PO BOX 6174 SANTA MARIA, CA 93456		PUBLIC CHARITY	GENERALGENERAL	250
SANTA BARBARA MARITIME MUSEUM 113 HARBOR WAY STE 190 SANTA BARBARA, CA 93109		PUBLIC CHARITY	GENERAL	2,000
SANTA BARBARA NATURAL HISTORY MUSEUM 2559 PUESTA DEL SOL SANTA BARBARA, CA 93105		PUBLIC CHARITY	GENERAL	350
SBCC FOUNDATION721 CLIFF DRIVE SANTA BARBARA, CA 93109		PUBLIC CHARITY	GENERAL	1,000
Total 3a				115,630

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>				
SIERRA CLUB CALIFORNIA 85 SECOND STREET 2ND FLOOR SAN FRANCISCO, CA 94105		PUBLIC CHARITY	GENERAL	1,000
STUDENT CONSERVATION ASSOCIATION 1230 PRESERVATION WAY OAKLAND, CA 94216		PUBLIC CHARITY	GENERAL	1,000
TRANSITION HOUSE 425 E COTA ST SANTA BARBARA, CA 93101		PUBLIC CHARITY	GENERAL	1,050
TRUST FOR PUBLIC LAND 101 MONTEGOMERY ST SAN FRANCISCO, CA 94104		PUBLIC CHARITY	GENERAL	600
VERMONT ACHIEVEMENT CENTER 88 PARK STREET RUTLAND, VT 05701		PUBLIC CHARITY	GENERAL	500
Total ▶ 3a				115,630

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>				
VERMONT COMMUNITY LOAN FUND PO BOX 827 MONTPELIER, VT 056010827		PUBLIC CHARITY	GENERAL	250
VERMONT NATURAL RESOURCES COUNCIL 9 BAILEY AVENUE MONTPELIER, VT 05602		PUBLIC CHARITY	GENERAL	500
VERMONT RIVER CONSERVANCY 29 MAIN ST 11 MONTPELIER, VT 05602		PUBLIC CHARITY	GENERAL	250
VERMONT WORKS FOR WOMEN 32A MALLETT'S BAY AVE WINOOSKI, VT 05404		PUBLIC CHARITY	GENERAL	1,000
VERMONTERS FOR CLEAN ENVIRONMENT 789 BAKER BROOK ROAD DANBY, VT 05739		PUBLIC CHARITY	GENERAL	500
Total 				115,630
3a				

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>				
WILDERNESS YOUTH PROJECT 5386 HOLLISTER AVE SUITE D SANTA BARBARA, CA 93111		PUBLIC CHARITY	GENERAL	1,000
WILDING MUSEUM 1511-B MISSION DRIVE SOLVANG, CA 93463		PUBLIC CHARITY	GENERAL	2,600
Total 3a			▶	115,630

TY 2017 Accounting Fees Schedule**Name:** THE OSHERENKO-YOUNG FOUNDATION**EIN:** 95-6093625**Accounting Fees Schedule**

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREPARATION	2,990	0		0

TY 2017 Investments Corporate Stock Schedule**Name:** THE OSHERENKO-YOUNG FOUNDATION**EIN:** 95-6093625

Name of Stock	End of Year Book Value	End of Year Fair Market Value
	180,338	299,133

TY 2017 Other Expenses Schedule**Name:** THE OSHERENKO-YOUNG FOUNDATION**EIN:** 95-6093625**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEES	109	0		0

TY 2017 Other Income Schedule**Name:** THE OSHERENKO-YOUNG FOUNDATION**EIN:** 95-6093625**Other Income Schedule**

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
REFUND	200		200

TY 2017 Taxes Schedule**Name:** THE OSHERENKO-YOUNG FOUNDATION**EIN:** 95-6093625

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INTERNAL REVENUE SERVICE	7,188	0		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
THE OSHERENKO-YOUNG FOUNDATION

Employer identification number
95-6093625

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 THE OSHERENKO-YOUNG FOUNDATION	Employer identification number 95-6093625
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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	ORAN YOUNG <hr/> 853 VIA GRANADA <hr/> SANTA BARBARA, CA 93103	\$ 17,913	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
	<hr/> <hr/>	\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
	<hr/> <hr/>	\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
	<hr/> <hr/>	\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
	<hr/> <hr/>	\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
	<hr/> <hr/>	\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
	<hr/> <hr/>	\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
	<hr/> <hr/>	\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)

Name of organization THE OSHERENKO-YOUNG FOUNDATION	Employer identification number 95-6093625
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Part II Noncash Property (See instructions) Use duplicate copies of Part II if additional space is needed

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
	_____ _____ _____	_____ \$ _____	_____
	_____ _____ _____	_____ \$ _____	_____
	_____ _____ _____	_____ \$ _____	_____
	_____ _____ _____	_____ \$ _____	_____
	_____ _____ _____	_____ \$ _____	_____
	_____ _____ _____	_____ \$ _____	_____
	_____ _____ _____	_____ \$ _____	_____
	_____ _____ _____	_____ \$ _____	_____
	_____ _____ _____	_____ \$ _____	_____

Name of organization THE OSHERENKO-YOUNG FOUNDATION	Employer identification number 95-6093625
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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

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>

(e) Transfer of gift Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
<hr/> <hr/>	<hr/> <hr/>

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>

(e) Transfer of gift Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
<hr/> <hr/>	<hr/> <hr/>

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>

(e) Transfer of gift Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
<hr/> <hr/>	<hr/> <hr/>

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>

(e) Transfer of gift Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
<hr/> <hr/>	<hr/> <hr/>