

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](http://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 **JUL 1, 2017**, and ending **JUN 30, 2018**

Name of foundation <b>JOHN RUAN FOUNDATION TRUST</b>		A Employer identification number <b>42-6059463</b>						
Number and street (or P.O. box number if mail is not delivered to street address) <b>666 GRAND AVENUE, 1700 RUAN CENTER</b>		B Telephone number <b>(515) 245-2552</b>						
City or town, state or province, country, and ZIP or foreign postal code <b>DES MOINES, IA 50309</b>		C If exemption application is pending, check here <input type="checkbox"/>						
G Check all that apply: <table border="0"> <tr> <td><input type="checkbox"/> Initial return</td> <td><input type="checkbox"/> Initial return of a former public charity</td> </tr> <tr> <td><input type="checkbox"/> Final return</td> <td><input type="checkbox"/> Amended return</td> </tr> <tr> <td><input type="checkbox"/> Address change</td> <td><input type="checkbox"/> Name change</td> </tr> </table>		<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"/>
<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							
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) <b>\$ 99,263,087.</b>	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	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))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received		45,382,199.			
2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments		28,263.	28,263.		STATEMENT 1
4 Dividends and interest from securities		3,161,063.	3,161,063.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		12,500,260.			
b Gross sales price for all assets on line 6a		59,714,693.			
7 Capital gain net income (from Part IV, line 2)			12,500,260.		
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					
12 Total. Add lines 1 through 11		61,071,785.	15,689,586.	0.	
13 Compensation of officers, directors, trustees, etc		0.	0.	0.	0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 3		700.	350.	0.	350.
c Other professional fees					
17 Interest					
18 Taxes STMT 4		135,099.	99.	0.	0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 5		11,465.	5,733.	0.	5,732.
24 Total operating and administrative expenses. Add lines 13 through 23		147,264.	6,182.	0.	6,082.
25 Contributions, gifts, grants paid		4,559,650.			4,559,650.
26 Total expenses and disbursements. Add lines 24 and 25		4,706,914.	6,182.	0.	4,565,732.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		56,364,871.			
b Net investment income (if negative, enter -0-)			15,683,404.		
c Adjusted net income (if negative, enter -0-)				0.	

<b>Part II Balance Sheets</b>		Attached schedules and amounts in the description column should be for end-of-year amounts only		
		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	161,680.	6,032,653.	6,032,653.
	3 Accounts receivable ▶ 2,467.			
	Less: allowance for doubtful accounts ▶	1,958.	2,467.	2,467.
	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	24,058,555.	11,951,233.	16,194,389.
	c Investments - corporate bonds STMT 7	16,628,715.	79,127,746.	76,289,878.
	11 Investments - land, buildings, and equipment: basis ▶			
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other STMT 8	900,000.	900,000.	743,700.	
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)	41,750,908.	98,014,099.	99,263,087.	
<b>Liabilities</b>	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue	139,794.	38,114.	
	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)	139,794.	38,114.		
<b>Net Assets or Fund Balances</b>	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>			
	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	14,921,048.	41,611,114.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	26,690,066.	56,364,871.	
	30 Total net assets or fund balances	41,611,114.	97,975,985.	
31 Total liabilities and net assets/fund balances	41,750,908.	98,014,099.		

**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	41,611,114.
2 Enter amount from Part I, line 27a	2	56,364,871.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	97,975,985.
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	97,975,985.

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a			
b SEE ATTACHED STATEMENT			
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 59,714,693.		47,214,433.	12,500,260.

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			12,500,260.

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	12,500,260.
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	1,546,890.	32,375,399.	.047780
2015	714,887.	16,699,020.	.042810
2014	833,615.	17,595,158.	.047378
2013	638,211.	13,993,819.	.045607
2012	676,255.	12,741,596.	.053075

2 Total of line 1, column (d)	2	.236650
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	.047330
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	4	91,576,372.
5 Multiply line 4 by line 3	5	4,334,310.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	156,834.
7 Add lines 5 and 6	7	4,491,144.
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	4,565,732.

**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 checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	156,834.
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	156,834.
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	156,834.
6 Credits/Payments:			
a 2017 estimated tax payments and 2016 overpayment credited to 2017	6a	157,243.	
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	157,243.	
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" 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	409.	
11 Enter the amount of line 10 to be: Credited to 2018 estimated tax <input checked="" type="checkbox"/> 409.   Refunded <input type="checkbox"/>	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
b 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
c 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. <input checked="" type="checkbox"/> \$ 0. (2) On foundation managers. <input checked="" type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input checked="" type="checkbox"/> \$ 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 <input checked="" type="checkbox"/> IA		
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	

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**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 ► TRACEY BALL Telephone no. ► (515) 245-2552 Located at ► 666 GRAND AVENUE 1700 RUAN CENTER, DES MOINES, IA ZIP+4 ► 50309		
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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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? If "Yes," list the years ►	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.)	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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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

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**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

Organizations relying on a current notice regarding disaster assistance, check here

☐

5b

X

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?

SEE STATEMENT 10

☒ 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?

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

6b

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
JOHN RUAN III 666 GRAND AVE, 1700 RUAN CENTER DES MOINES, IA 50309	TRUSTEE  0.50	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 N/A	
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 N/A	
2	
All other program-related investments See instructions.	
3	

Total. Add lines 1 through 3

0.

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**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	88,147,006.
b	Average of monthly cash balances	1b	4,823,930.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	92,970,936.
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	92,970,936.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	1,394,564.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	91,576,372.
6	Minimum investment return. Enter 5% of line 5	6	4,578,819.

**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	4,578,819.
2a	Tax on investment income for 2017 from Part VI, line 5	2a	156,834.
b	Income tax for 2017. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	156,834.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	4,421,985.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	4,421,985.
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	4,421,985.

**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	4,565,732.
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	4,565,732.
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	156,834.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	4,408,898.

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				4,421,985.
<b>2</b> Undistributed Income, if any, as of the end of 2017				
<b>a</b> Enter amount for 2016 only			588,579.	
<b>b</b> Total for prior years:		0.		
<b>3</b> Excess distributions carryover, if any, to 2017:				
<b>a</b> From 2012				
<b>b</b> From 2013				
<b>c</b> From 2014				
<b>d</b> From 2015				
<b>e</b> From 2016				
<b>f</b> Total of lines 3a through e	0.			
<b>4</b> Qualifying distributions for 2017 from Part XII, line 4: ▶ \$ 4,565,732.				
<b>a</b> Applied to 2016, but not more than line 2a			588,579.	
<b>b</b> Applied to undistributed income of prior years (Election required - see instructions)		0.		
<b>c</b> Treated as distributions out of corpus (Election required - see instructions)	0.			
<b>d</b> Applied to 2017 distributable amount				3,977,153.
<b>e</b> Remaining amount distributed out of corpus	0.			
<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))	0.			0.
<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	0.			
<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		0.		
<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 instr.			0.	
<b>f</b> Undistributed income for 2017. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2018				444,832.
<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)	0.			
<b>8</b> Excess distributions carryover from 2012 not applied on line 5 or line 7	0.			
<b>9</b> Excess distributions carryover to 2018 Subtract lines 7 and 8 from line 6a	0.			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2013				
<b>b</b> Excess from 2014				
<b>c</b> Excess from 2015				
<b>d</b> Excess from 2016				
<b>e</b> Excess from 2017				



**Part XV** Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a Paid during the year</b>				
AMERICA'S FAMILY COACHES 160 S. 68TH STREET WEST DES MOINES, IA 50266		PC	ACTIVITIES DIRECTED TO OTHER ORGANIZATIONS	10,000.
BERGMAN ACADEMY 100 45TH STREET DES MOINES, IA 50312		PC	ACTIVITIES DIRECTED TO OTHER ORGANIZATIONS	250,000.
AVON OLD FARMS SCHOOL 500 OLD FARMS ROAD AVON, CT 06001-9958		PC	SCHOOLS, COLLEGES, AND RELATED ACTIVITIES	105,000.
BERGMAN ACADEMY 100 45TH STREET DES MOINES, IA 50312		PC	SCHOOLS, COLLEGES, AND RELATED ACTIVITIES	5,000.
BLANK PARK ZOO FOUNDATION 7401 SW 9TH STREET DES MOINES, IA 50315		PC	CULTURAL, HISTORICAL OR OTHER EDUCATION ACTIVITIES	7,500.
<b>Total</b>	<b>SEE CONTINUATION SHEET(S)</b>			<b>4,559,650.</b>
<b>b Approved for future payment</b>				
NONE				
<b>Total</b>				<b>0.</b>



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

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

(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.

Signature of officer or trustee

Date \_\_\_\_\_

Title

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

**Paid  
Preparer  
Use Only**

Print/Type preparer's name

Preparer's signature

Date \_\_\_\_\_

Check ☐ self-employed

PTIN

JAY A. ANDERSON

Firm's name ► EIDE BAILLY LLP

Firm's address ▶ 666 WALNUT STREET SUITE 1450  
DES MOINES, IA 50309-3918

Firm's EIN ► 45-0250958

Phone no. 515-244-0266

**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	INTEL	P	VARIOUS	VARIOUS
b	CALLS	P	VARIOUS	VARIOUS
c	FREEPORT MCMORAN	P	05/13/15	07/24/17
d	ANHEUSER BUSCH	P	11/14/17	03/19/18
e	US CELLULAR	P	11/16/15	06/27/18
f	WW GRAINGER	P	02/25/09	01/29/18
g				
h				
i				
j				
k				
l				
m				
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 58,507,788.		46,051,111.	12,456,677.
b 33,117.			33,117.
c 441,853.		441,507.	346.
d 259,840.		267,707.	<7,867.>
e 447,401.		435,000.	12,401.
f 24,694.		19,108.	5,586.
g			
h			
i			
j			
k			
l			
m			
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			12,456,677.
b			33,117.
c			346.
d			<7,867.>
e			12,401.
f			5,586.
g			
h			
i			
j			
k			
l			
m			
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	12,500,260.
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

## JOHN RUAN FOUNDATION TRUST

42-6059463

**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
BLUE RIBBON FOUNDATION PO BOX 57130 DES MOINES, IA 50317		PC	ACTIVITIES DIRECTED TO OTHER ORGANIZATIONS	5,250.
BOY SCOUTS OF AMERICA MID IOWA COUNCIL 1659 EAST EUCLID AVENUE DES MOINES, IA 50313		PC	YOUTH ACTIVITIES	1,000.
BOYS & GIRLS CLUBS OF IOWA 1031 OFFICE PARK ROAD, SUITE 1 WEST DES MOINES, IA 50265		PC	YOUTH ACTIVITIES	251,000.
BRENTON ARBORETUM 25141 260TH STREET DALLAS CENTER, IA 50063		PC	ACTIVITIES DIRECTED TO OTHER ORGANIZATIONS	2,500.
BRICKER-PRICE BLOCK 30375 NAPA RANCH ROAD WAUKEE, IA 50263		PC	CULTURAL, HISTORICAL OR OTHER EDUCATION ACTIVITIES	50,000.
CANCER ASSOC OF ANDERSON 215 E. CALHOUN STREET ANDERSON, SC 29621		PC	HEALTH SERVICES AND RELATED ACTIVITIES	500.
CIVIC CENTER OF GREATER DES MOINES 221 WALNUT STREET DES MOINES, IA 50309		PC	CULTURAL, HISTORICAL OR OTHER EDUCATION ACTIVITIES	5,000.
COLONIAL WILLIAMSBURG FOUNDATION PO BOX 1776 WILLIAMSBURG, VA 23187		PC	ACTIVITIES DIRECTED TO OTHER ORGANIZATIONS	5,000.
CULVER EDUCATIONAL FOUNDATION 1300 ACADEMY ROAD CULVER, IN 46511		PC	SCHOOLS, COLLEGES, AND RELATED ACTIVITIES	23,500.
CATHOLIC CHARITIES OF WICHITA 437 N. TOPEKA STREET WICHITA, KS 67202		PC	RELIGIOUS ACTIVITIES	500.
Total from continuation sheets				4,182,150.

## JOHN RUAN FOUNDATION TRUST

42-6059463

**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
DES MOINES AREA COMMUNITY COLLEGE 2006 S. ANKENY BLVD ANKENY, IA 50021		PC	SCHOOLS, COLLEGES, AND RELATED ACTIVITIES	5,000.
DES MOINES ART CENTER 4700 GRAND AVENUE DES MOINES, IA 50312-2099		PC	CULTURAL, HISTORICAL OR OTHER EDUCATION ACTIVITIES	20,000.
DES MOINES ART FESTIVAL 400 LOCUST STREET, SUITE 255 DES MOINES, IA 50309		PC	CULTURAL, HISTORICAL OR OTHER EDUCATION ACTIVITIES	10,000.
CENTRAL PRESBYTERIAN CHURCH 3829 GRAND AVENUE DES MOINES, IA 50312		PC	RELIGIOUS ACTIVITIES	1,000.
DES MOINES BOTANICAL CENTER 909 E. RIVER DRIVE DES MOINES, IA 50309		PC	ACTIVITIES DIRECTED TO OTHER ORGANIZATIONS	505,000.
DES MOINES COMMUNITY PLAYHOUSE 831 42ND STREET DES MOINES, IA 50312		PC	ACTIVITIES DIRECTED TO OTHER ORGANIZATIONS	2,500.
DES MOINES METROPOLITAN OPERA 106 WEST BOSTON AVENUE INDIANOLA, IA 50125		PC	CULTURAL, HISTORICAL OR OTHER EDUCATION ACTIVITIES	157,500.
CLEAR LAKES ART CENTER 213 MAIN AVENUE CLEAR LAKE, IA 50428		PC	CULTURAL, HISTORICAL OR OTHER EDUCATION ACTIVITIES	1,000.
DES MOINES SYMPHONY 221 WALNUT STREET DES MOINES, IA 50309		PC	ACTIVITIES DIRECTED TO OTHER ORGANIZATIONS	30,000.
DRAKE UNIVERSITY 2507 UNIVERSITY AVENUE DES MOINES, IA 50311		PC	SCHOOLS, COLLEGES, AND RELATED ACTIVITIES	45,000.
Total from continuation sheets				



**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
COLONIAL WILLIAMSBURG FOUNDATION PO BOX 1776 WILLIAMSBURG, VA 23187		PC	CULTURAL, HISTORICAL OR OTHER EDUCATION ACTIVITIES	5,000.
COMMUNITY FOUNDATION FOX VALLEY 4455 W. LAWRENCE STREET APPLETON, WI 54914		PC	ACTIVITIES DIRECTED TO OTHER ORGANIZATIONS	11,500.
FOOD BANK OF IOWA 2220 E. 17TH STREET DES MOINES, IA 50316		PC	ACTIVITIES DIRECTED TO OTHER ORGANIZATIONS	80,000.
FRIENDS OF DES MOINES PARKS 1551 E MARTIN LUTHER KING PARKWAY DES MOINES, IA 50317		PC	ACTIVITIES DIRECTED TO OTHER ORGANIZATIONS	1,000.
COMMUNITY FOUNDATION LEADERSHIP CIRCLE 1915 GRAND AVENUE DES MOINES, IA 50309		PC	ACTIVITIES DIRECTED TO OTHER ORGANIZATIONS	500,000.
GDMF BETTER TOGETHER FUND 1915 GRAND AVENUE DES MOINES, IA 50309		PC	ACTIVITIES DIRECTED TO OTHER ORGANIZATIONS	1,000.
CYSTIC FIBROSIS FOUNDATION 4150 WESTOWN PARKWAY, SUITE 203 WEST DES MOINES, IA 50265		PC	HEALTH SERVICES AND RELATED ACTIVITIES	2,000.
DES MOINES UNIVERSITY 3200 GRAND AVENUE DES MOINES, IA 50312		PC	SCHOOLS, COLLEGES, AND RELATED ACTIVITIES	1,000.
DES MOINES WATER WORKS FOUNDATION 2704 FLEUR DRIVE, SUITE 202 DES MOINES, IA 50321		PC	ACTIVITIES DIRECTED TO OTHER ORGANIZATIONS	500,000.
GREATER DES MOINES COMMUNITY FOUNDATION/BRAVO 1915 GRAND AVENUE DES MOINES, IA 50309		PC	CULTURAL, HISTORICAL OR OTHER EDUCATION ACTIVITIES	5,000.
Total from continuation sheets				

## JOHN RUAN FOUNDATION TRUST

42-6059463

**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
DM REG SKATELAND PARK FUND 7700 MILLS CIVIC PARKWAY WEST DES MOINES, IA 50266		PC	SPORTS, ATHLETIC ACTIVITIES	100,000.
DOWLING CATHOLIC HIGH SCHOOL 1400 BUFFALO ROAD WEST DES MOINES, IA 50265		PC	SCHOOLS, COLLEGES, AND RELATED ACTIVITIES	500.
HOPE MINISTRIES PO BOX 862 DES MOINES, IA 50304-0862		PC	ACTIVITIES DIRECTED TO OTHER ORGANIZATIONS	2,500.
DRAKE UNIVERSITY 2507 UNIVERSITY AVENUE DES MOINES, IA 50311		PC	ACTIVITIES DIRECTED TO OTHER ORGANIZATIONS	100,000.
IOWA MOTOR CARRIERS FOUNDATION 717 E. COURT AVENUE DES MOINES, IA 50309		PC	ACTIVITIES DIRECTED TO OTHER ORGANIZATIONS	250,000.
IOWA HISTORICAL FOUNDATION 600 EAST LOCUST STREET DES MOINES, IA 50309		PC	CULTURAL, HISTORICAL OR OTHER EDUCATION ACTIVITIES	2,500.
IOWA NATURAL HERITAGE FOUNDATION 505 5TH AVE, SUITE 444 DES MOINES, IA 50309		PC	CONSERVATION, ENVIRONMENT & BEAUTIFICATION ACT	500.
ISU FOUNDATION 2505 UNIVERSITY AVENUE AMES, IA 50010		PC	SCHOOLS, COLLEGES, AND RELATED ACTIVITIES	25,000.
JACK A. VICKERS FUND 7009 S. POTOMAC STREET, SUITE 125 CENTENNIAL, CO 80112		PC	ACTIVITIES DIRECTED TO OTHER ORGANIZATIONS	1,000.
JUVENILE DIABETES FOUNDATION 6910 VISTA DRIVE WEST DES MOINES, IA 50266		PC	HEALTH SERVICES AND RELATED ACTIVITIES	1,000.
Total from continuation sheets				

**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
LOST TREE CHARITABLE FOUNDATION 11555 LOST TREE WAY NORTH PALM BEACH, FL 33408		PC	RELIGIOUS ACTIVITIES	5,000.
MACNIDER ART MUSEUM 303 SECOND STREET SE MASON CITY, IA 50401-3988		PC	CULTURAL, HISTORICAL OR OTHER EDUCATION ACTIVITIES	1,000.
MALTZ JUPITER THEATRE 1001 E INDIANTOWN ROAD JUPITER, FL 33477		PC	ACTIVITIES DIRECTED TO OTHER ORGANIZATIONS	154,500.
MAYO CLINIC 2000 FIRST STREET SW ROCHESTER, MN 55905		PC	HEALTH SERVICES AND RELATED ACTIVITIES	5,000.
METRO SQUASH 5655 S UNIVERSITY AVENUE CHICAGO, IL 60637		PC	ACTIVITIES DIRECTED TO OTHER ORGANIZATIONS	10,000.
MORRIS SCHOLARSHIP FUND 525 SW 5TH STREET, SUITE A DES MOINES, IA 50309		PC	INNER CITY OR COMMUNITY ACTIVITIES	1,500.
MULTIPLE SCLEROSIS SOCIETY OF IOWA 8187 UNIVERSITY AVENUE CLIVE, IA 50325		PC	HEALTH SERVICES AND RELATED ACTIVITIES	2,500.
JOHN STODDARD CANCER CENTER 1415 WOODLAND, SUITE E200 DES MOINES, IA 50309		PC	HEALTH SERVICES AND RELATED ACTIVITIES	1,000.
NATIONAL PARKS CONSERVATION ASSOCIATION 777 SIXTH STREET NW, SUITE 700 WASHINGTON, DC 20001		PC	ACTIVITIES DIRECTED TO OTHER ORGANIZATIONS	2,500.
NATURE CONSERVANCY 505 FIFTH AVENUE, SUITE 930 DES MOINES, IA 50309		PC	CONSERVATION, ENVIRONMENT & BEAUTIFICATION ACT	25,000.
Total from continuation sheets				

## JOHN RUAN FOUNDATION TRUST

42-6059463

**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
NICKLAUS CHILDRENS HEALTHCARE FOUNDATION 927 45TH STREET, SUITE 206 WEST PALM BEACH, FL 33407		PC	HEALTH SERVICES AND RELATED ACTIVITIES	750.
NORTHWESTERN UNIVERSITY 1936 SHERIDAN ROAD EVANSTON, IL 60208-4040		PC	SCHOOLS, COLLEGES, AND RELATED ACTIVITIES	757,500.
JOURNEY CARE FOUNDATION 2050 CLAIRE COURT GLENVIEW, IL 60025		PC	HEALTH SERVICES AND RELATED ACTIVITIES	1,000.
ORCHARD PLACE PO BOX 35426 DES MOINES, IA 50315-0304		PC	HEALTH SERVICES AND RELATED ACTIVITIES	2,500.
JUPITER MEDICAL CENTER FOUNDATION 1210 S. OLD DIXIE HIGHWAY JUPITER, FL 33458		PC	HEALTH SERVICES AND RELATED ACTIVITIES	5,000.
POSITIVE OUTREACH PROGRAM FOR KIDS PO BOX 65305 WEST DES MOINES, IA 50265		PC	ACTIVITIES DIRECTED TO OTHER ORGANIZATIONS	250.
PUBLIC LIBRARY OF DES MOINES FOUNDATION 100 LOCUST STREET DES MOINES, IA 50393		PC	ACTIVITIES DIRECTED TO OTHER ORGANIZATIONS	2,500.
KUEMPER CATHOLIC SCHOOL FOUNDATION 116 S. EAST STREET CARROLL, IA 51401		PC	RELIGIOUS ACTIVITIES	500.
REACHING HIGHER IOWA PO BOX 42515 URBANDALE, IA 50323		PC	SCHOOLS, COLLEGES, AND RELATED ACTIVITIES	15,000.
LADY OF MERCY SCHOOL 1437 BLOSSOM ROAD ROCHESTER, NY 14610		PC	HEALTH SERVICES AND RELATED ACTIVITIES	500.
Total from continuation sheets .				

## JOHN RUAN FOUNDATION TRUST

42-6059463

**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
SALISBURY HOUSE FOUNDATION 4025 TONAWANDA DRIVE DES MOINES, IA 50312		PC	CULTURAL, HISTORICAL OR OTHER EDUCATION ACTIVITIES	102,500.
SALVATION ARMY PO BOX 933 DES MOINES, IA 50304		PC	ACTIVITIES DIRECTED TO OTHER ORGANIZATIONS	1,000.
SCIENCE CENTER OF IOWA 401 W. ML KING PARKWAY DES MOINES, IA 50309		PC	CULTURAL, HISTORICAL OR OTHER EDUCATION ACTIVITIES	2,500.
MAINFRAME STUDIOS 900 KEOSAUQUA WAY DES MOINES, IA 50309		PC	ACTIVITIES DIRECTED TO OTHER ORGANIZATIONS	25,000.
SO OTHERS MIGHT EAT 60 O STREET NW WASHINGTON, DC 20001		PC	ACTIVITIES DIRECTED TO OTHER ORGANIZATIONS	5,000.
ST AUGUSTIN CATHOLIC SCHOOL 4320 GRAND AVENUE DES MOINES, IA 50312		PC	YOUTH ACTIVITIES	25,000.
MEDICAL COLLEGE OF WISCONSIN PO BOX 26509 MILWAUKEE, WI 53226		PC	HEALTH SERVICES AND RELATED ACTIVITIES	1,000.
UNITED WAY OF CENTRAL IOWA 1111 NINTH STREET DES MOINES, IA 50314		PC	ACTIVITIES DIRECTED TO OTHER ORGANIZATIONS	500.
MERCY CANCER CENTER WEST LAKES 12495 UNIVERSITY CLIVE, IA 50325		PC	SCHOOLS, COLLEGES, AND RELATED ACTIVITIES	1,000.
NORTON MUSEUM OF ART 1451 S. OLIVE AVENUE WEST PALM BEACH, FL 33401		PC	CULTURAL, HISTORICAL OR OTHER EDUCATION ACTIVITIES	10,000.
Total from continuation sheets				

**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
VARIETY - THE CHILDREN'S CHARITY 505 FIFTH AVENUE, SUITE 310 DES MOINES, IA 50309		PC	ACTIVITIES DIRECTED TO OTHER ORGANIZATIONS	5,000.
ROOSEVELT HIGH SCHOOL BASEBALL 4419 CENTER STREET DES MOINES, IA 50312		PC	SPORTS, ATHLETIC ACTIVITIES	1,000.
ROOSEVELT HIGH SCHOOL FOUNDATION PO BOX 65563 WEST DES MOINES, IA 50265		PC	SCHOOLS, COLLEGES, AND RELATED ACTIVITIES	2,500.
WORLD FOOD PRIZE 100 LOCUST STREET DES MOINES, IA 50309		POF	ACTIVITIES DIRECTED TO OTHER ORGANIZATIONS	57,100.
YMCA 501 GRAND AVENUE DES MOINES, IA 50309		PC	YOUTH ACTIVITIES	80,000.
WORLD FOOD PRIZE YOUTH 100 LOCUST STREET DES MOINES, IA 50309		POF	YOUTH ACTIVITIES	100,000.
SIMON LU DOWNTOWN EVENTS CENTER 700 LOCUST STREET, SUITE 100 DES MOINES, IA 50309		PC	ACTIVITIES DIRECTED TO OTHER ORGANIZATIONS	5,000.
TERRACE HILL PARTNERSHIP 2300 GRAND AVENUE DES MOINES, IA 50312		PC	ACTIVITIES DIRECTED TO OTHER ORGANIZATIONS	2,500.
THE LAWRENCEVILLE FUND PO BOX 6125 LAWRENCEVILLE, NJ 01342		PC	SCHOOLS, COLLEGES, AND RELATED ACTIVITIES	5,000.
THE RIDERS CLUB 4419 CENTER STREET DES MOINES, IA 50312		PC	SPORTS, ATHLETIC ACTIVITIES	1,000.
Total from continuation sheets				

42-6059463

**3 Grants and Contributions Paid During the Year (Continuation)**

723631  
04-01-17

**Schedule B**(Form 990, 990-EZ,  
or 990-PF)Department of the Treasury  
Internal Revenue Service**Schedule of Contributors**

- ▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.  
▶ Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No 1545-0047

**2017**

Name of the organization

JOHN RUAN FOUNDATION TRUST

Employer identification number

42-6059463

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 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 33 1/3% 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 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

**LHA For Paperwork Reduction Act Notice, see the instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2017)**



Name of organization	Employer identification number
JOHN RUAN FOUNDATION TRUST	42-6059463

**Part I Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	ELIZABETH RUAN TRUST 666 GRAND AVENUE, 1700 RUAN CENTER DES MOINES, IA 50309	\$ 12,389,586.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
2	ELIZABETH RUAN TRUST 666 GRAND AVENUE, 1700 RUAN CENTER DES MOINES, IA 50309	\$ 32,992,613.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Employer identification number

42-6059463

**Part II Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

[illegible]

Name of organization

Employer identification number

JOHN RUAN FOUNDATION TRUST

42-6059463

**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 info once) ▶ \$

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
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

## FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
BANKERS TRUST	28,263.	28,263.	28,263.
TOTAL TO PART I, LINE 3	28,263.	28,263.	28,263.

## FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
CENTURYLINK	2,918.	0.	2,918.	2,918.	2,918.
CITIGROUP	45.	0.	45.	45.	45.
DAVIDSON	330.	0.	330.	330.	330.
GM	661.	0.	661.	661.	661.
INTEL CORP	871,671.	0.	871,671.	871,671.	871,671.
MERRILL	2,119.	0.	2,119.	2,119.	2,119.
PRUDENTIAL	8,108.	0.	8,108.	8,108.	8,108.
STOCKS AND BONDS	2,235,835.	0.	2,235,835.	2,235,835.	2,235,835.
US GOVERNMENT FEDERATED MUTUAL FUNDS	24,855.	0.	24,855.	24,855.	24,855.
WELLS FARGO	14,521.	0.	14,521.	14,521.	14,521.
TO PART I, LINE 4	3,161,063.	0.	3,161,063.	3,161,063.	3,161,063.

## 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	700.	350.	0.	350.
TO FORM 990-PF, PG 1, LN 16B	700.	350.	0.	350.

FORM 990-PF	TAXES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FEDERAL INCOME TAX	135,000.	0.	0.	0.	
FOREIGN TAX	99.	99.	0.	0.	
TO FORM 990-PF, PG 1, LN 18	135,099.	99.	0.	0.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
MISCELLANEOUS EXPENSE	11,465.	5,733.	0.	5,732.	
TO FORM 990-PF, PG 1, LN 23	11,465.	5,733.	0.	5,732.	

FORM 990-PF	CORPORATE STOCK		STATEMENT	6
DESCRIPTION	BOOK VALUE		FAIR MARKET VALUE	
CORPORATE STOCK	11,951,233.		16,194,389.	
TOTAL TO FORM 990-PF, PART II, LINE 10B	11,951,233.		16,194,389.	

FORM 990-PF	CORPORATE BONDS		STATEMENT	7
DESCRIPTION	BOOK VALUE		FAIR MARKET VALUE	
CORPORATE BONDS	79,127,746.		76,289,878.	
TOTAL TO FORM 990-PF, PART II, LINE 10C	79,127,746.		76,289,878.	

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	8
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
MUTUAL FUNDS	COST	900,000.	743,700.
TOTAL TO FORM 990-PF, PART II, LINE 13		900,000.	743,700.

FORM 990-PF	LIST OF SUBSTANTIAL CONTRIBUTORS PART VII-A, LINE 10	STATEMENT	9
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NAME OF CONTRIBUTOR	ADDRESS
ELIZABETH RUAN TRUST	666 GRAND AVENUE DES MOINES, IA 50309

FORM 990-PF

EXPENDITURE RESPONSIBILITY STATEMENT  
PART VII-B, LINE 5C

STATEMENT 10

GRANTEE'S NAME

WORLD FOOD PRIZE FOUNDATION

GRANTEE'S ADDRESS100 LOCUST STREET  
DES MOINES, IA 50309

<u>GRANT AMOUNT</u>	<u>DATE OF GRANT</u>	<u>AMOUNT EXPENDED</u>	<u>VERIFICATION DATE</u>
22,500.	07/21/17	22,500.	06/30/18

PURPOSE OF GRANT

THE GRANT WAS MADE TO THE GRANTEE TO ASSIST IN FULFILLING ITS TAX EXEMPT PURPOSE.  
THE WORLD FOOD PRIZE FOUNDATION IS AN OPERATING PRIVATE FOUNDATION.

ANY DIVERSION BY GRANTEE

NONE

GRANTEE'S NAME

WORLD FOOD PRIZE FOUNDATION

GRANTEE'S ADDRESS

100 LOCUST STREET  
DES MOINES, IA 50309

<u>GRANT AMOUNT</u>	<u>DATE OF GRANT</u>	<u>AMOUNT EXPENDED</u>	<u>VERIFICATION DATE</u>
15,000.	10/30/17	15,000.	06/30/18

PURPOSE OF GRANT

THE GRANT WAS MADE TO THE GRANTEE TO ASSIST IN FULFILLING ITS TAX EXEMPT PURPOSE.  
THE WORLD FOOD PRIZE FOUNDATION IS AN OPERATING PRIVATE FOUNDATION.

ANY DIVERSION BY GRANTEE

NONE



GRANTEE'S NAME

WORLD FOOD PRIZE FOUNDATION

GRANTEE'S ADDRESS100 LOCUST STREET  
DES MOINES, IA 50309

<u>GRANT AMOUNT</u>	<u>DATE OF GRANT</u>	<u>AMOUNT EXPENDED</u>	<u>VERIFICATION DATE</u>
2,100.	11/21/17	2,100.	06/30/18

PURPOSE OF GRANTTHE GRANT WAS MADE TO THE GRANTEE TO ASSIST IN FULFILLING ITS TAX EXEMPT  
PURPOSE.

THE WORLD FOOD PRIZE FOUNDATION IS AN OPERATING PRIVATE FOUNDATION.

ANY DIVERSION BY GRANTEE

NONE

GRANTEE'S NAME

WORLD FOOD PRIZE FOUNDATION

GRANTEE'S ADDRESS100 LOCUST STREET  
DES MOINES, IA 50309

<u>GRANT AMOUNT</u>	<u>DATE OF GRANT</u>	<u>AMOUNT EXPENDED</u>	<u>VERIFICATION DATE</u>
17,500.	06/14/18	17,500.	06/30/18

PURPOSE OF GRANT

THE GRANT WAS MADE TO THE GRANTEE TO ASSIST IN FULFILLING ITS TAX EXEMPT PURPOSE.

THE WORLD FOOD PRIZE FOUNDATION IS AN OPERATING PRIVATE FOUNDATION.

ANY DIVERSION BY GRANTEE

NONE

GRANTEE'S NAME

WORLD FOOD PRIZE FOUNDATION

GRANTEE'S ADDRESS

100 LOCUST STREET  
DES MOINES, IA 50309

<u>GRANT AMOUNT</u>	<u>DATE OF GRANT</u>	<u>AMOUNT EXPENDED</u>	<u>VERIFICATION DATE</u>
100,000.	06/11/18	0.	06/30/18

PURPOSE OF GRANT

THE GRANT WAS MADE TO THE GRANTEE TO ASSIST IN FULFILLING ITS TAX EXEMPT PURPOSE.  
THE WORLD FOOD PRIZE FOUNDATION IS AN OPERATING PRIVATE FOUNDATION.

ANY DIVERSION BY GRANTEE

NONE