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Form 990-PF

Department of the Treasury
Internal Revenue Service

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

Do not enter social security numbers on this form as it may be made public.
Information about Form 990-PF and its instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2017

Open to Public Inspection

For calendar year 2017, or tax year beginning 07-01-2017, and ending 06-30-2018

Name of foundation
EVALYN SADLIER JONES FOUNDATION 1955000059

Number and street (or P O box number if mail is not delivered to street address)
P O BOX 11647

City or town, state or province, country, and ZIP or foreign postal code
BIRMINGHAM, AL 35202

G Check all that apply

☐ Initial return

☐ Initial return of a former public charity

☐ Final return

☐ Amended return

☐ Address change

☐ Name change

H Check type of organization

☒ Section 501(c)(3) exempt private foundation

☐ Section 4947(a)(1) nonexempt charitable trust

☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col (c), line 16)1,798,584

J Accounting method

☐ Cash

☐ Accrual

☐ Other (specify)
(Part I, column (d) must be on cash basis)

A Employer identification number
65-6156449

B Telephone number (see instructions)
(205) 420-7753

C If exemption application is pending, check here

D 1. Foreign organizations, check here

2 Foreign organizations meeting the 85% test, check here and attach computation

E If private foundation status was terminated under section 507(b)(1)(A), check here

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here

Part I

Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (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)			
	2 Check If the foundation is not required to attach Sch B			
	3 Interest on savings and temporary cash investments			
	4 Dividends and interest from securities	30,157	30,157	
	5a Gross rents			
	b Net rental income or (loss)			
	6a Net gain or (loss) from sale of assets not on line 10	112,357		
	b Gross sales price for all assets on line 6a			
	7 Capital gain net income (from Part IV, line 2)		112,357	
	8 Net short-term capital gain			0
	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)	26			
12 Total. Add lines 1 through 11	142,540	142,514		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	20,479	15,359	5,120
	14 Other employee salaries and wages		0	0
	15 Pension plans, employee benefits		0	0
	16a Legal fees (attach schedule)	2,925	0	0
	b Accounting fees (attach schedule)	1,800	0	0
	c Other professional fees (attach schedule)	12,123	5,223	6,900
	17 Interest			0
	18 Taxes (attach schedule) (see instructions)	497	217	0
	19 Depreciation (attach schedule) and depletion	0	0	
	20 Occupancy			
	21 Travel, conferences, and meetings		0	0
	22 Printing and publications		0	0
	23 Other expenses (attach schedule)	6	6	
	24 Total operating and administrative expenses. Add lines 13 through 23	37,830	20,805	0
	25 Contributions, gifts, grants paid	94,500		94,500
	26 Total expenses and disbursements. Add lines 24 and 25	132,330	20,805	0
	27 Subtract line 26 from line 12			
	a Excess of revenue over expenses and disbursements	10,210		
	b Net investment income (if negative, enter -0-)		121,709	
c Adjusted net income(if negative, enter -0-)			0	

For Paperwork Reduction Act Notice, see instructions.

Cat No 11289X

Form 990-PF (2017)

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions.)			
		Beginning of year (a) Book Value	End of year (b) Book Value (c) Fair Market Value		
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	62,649	70,909	70,909
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____		0	0
	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 ▶ _____ 0			
	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)	1,207,503		
	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)	 1,209,056		1,727,675
	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)	1,270,152	1,279,965	1,798,584	
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	
	Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.			
24		Unrestricted			
25		Temporarily restricted			
26		Permanently restricted			
Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.					
27		Capital stock, trust principal, or current funds	1,270,152	1,279,965	
28		Paid-in or capital surplus, or land, bldg , and equipment fund			
29		Retained earnings, accumulated income, endowment, or other funds			
30	Total net assets or fund balances (see instructions)	1,270,152	1,279,965		
31	Total liabilities and net assets/fund balances (see instructions) .	1,270,152	1,279,965		

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	1,270,152
2	Enter amount from Part I, line 27a	2	10,210
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	1,280,362
5	Decreases not included in line 2 (itemize) ▶ _____ 	5	397
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	1,279,965

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 See Additional Data Table			
b			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a See Additional Data Table			
b			
c			
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 See Additional Data Table			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	112,357
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	107,388	1,540,787	0 069697
2015	32,896	1,480,669	0 022217
2014	82,145	1,619,111	0 050735
2013	83,531	1,619,587	0 051575
2012	57,505	1,538,850	0 037369
2 Total of line 1, column (d)			2 0 231593
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years			3 0 046319
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5			4 1,743,796
5 Multiply line 4 by line 3			5 80,771
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 1,217
7 Add lines 5 and 6			7 81,988
8 Enter qualifying distributions from Part XII, line 4			8 111,245

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b	1	1,217
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3	Add lines 1 and 2.	3	1,217
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	1,217
6	Credits/Payments		
a	2017 estimated tax payments and 2016 overpayment credited to 2017	6a	366
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	
7	Total credits and payments. Add lines 6a through 6d.	7	366
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	0
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	851
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	
11	Enter the amount of line 10 to be Credited to 2018 estimated tax ☐ 0 Refunded ☐	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?	1a	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for 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	1b	No
c Did the foundation file Form 1120-POL for this year?	1c	No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ☐ \$ _____ (2) On foundation managers ☐ \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$ _____		
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	2	No
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3	No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	No
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T	5	No
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ FL _____		
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 .	8b	Yes
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2017 or the taxable year beginning in 2017 (see instructions for Part XIV)? If "Yes," complete Part XIV	9	No
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10	No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A	13	Yes	
14	The books are in care of REGIONS BANK TRUST DEPARTMENT Telephone no (251) 690-1024			

Located at **11 N WATER STREET 25TH FLOOR MOBILE AL** ZIP+4 **36602**

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ☐ and enter the amount of tax-exempt interest received or accrued during the year 15			
16	At any time during calendar year 2017, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR). If "Yes," enter the name of the foreign country ▶	16	Yes	No

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

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

1a	During the year did the foundation (either directly or indirectly)		Yes	No
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☒ Yes ☐ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? ☐ Organizations relying on a current notice regarding disaster assistance check here. ☐	1b		No
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2017? ☐	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2017, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2017? ☐ Yes ☒ No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions). ☐	2b		No
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2017 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2017). ☐	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2017?	4b		No

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

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

Part VIII

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

1

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

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
See Additional Data Table				

2

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

(a) Name and address of each employee paid more than \$50,000	Title, and average hours per week (b) devoted to position	(c) Compensation	Contributions to employee benefit plans and deferred compensation (d)	Expense account, (e) other allowances
NONE				

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

0

3

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
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	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See instructions.	
3	

Total. Add lines 1 through 3

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	1,770,351
b	Average of monthly cash balances.	1b	0
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	1,770,351
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	1,770,351
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	26,555
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,743,796
6	Minimum investment return. Enter 5% of line 5.	6	87,190

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	87,190
2a	Tax on investment income for 2017 from Part VI, line 5.	2a	1,217
b	Income tax for 2017 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	1,217
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	85,973
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	85,973
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	85,973

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	111,245
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	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	111,245
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	1,217
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	110,028

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				85,973
2 Undistributed income, if any, as of the end of 2017				
a Enter amount for 2016 only.			2,507	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2017				
a From 2012.	0			
b From 2013.	0			
c From 2014.	0			
d From 2015.	0			
e From 2016.	0			
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2017 from Part XII, line 4 ▶ \$ <u>111,245</u>				
a Applied to 2016, but not more than line 2a			2,507	
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.				85,973
e Remaining amount distributed out of corpus	22,765			
5 Excess distributions carryover applied to 2017 (If an amount appears in column (d), the same amount must be shown in column (a))	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	22,765			
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).	0			
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a	22,765			
10 Analysis of line 9				
a Excess from 2013.	0			
b Excess from 2014.	0			
c Excess from 2015.	0			
d Excess from 2016.	0			
e Excess from 2017.	22,765			

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2017, enter the date of the ruling. ▶					
b Check box to indicate whether the organization is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)					
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	Tax year	Prior 3 years			(e) Total
	(a) 2017	(b) 2016	(c) 2015	(d) 2014	
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 email address of the person to whom applications should be addressed

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

c Any submission deadlines

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

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> See Additional Data Table				
Total			3a	94,500
b <i>Approved for future payment</i>				
Total			3b	

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2017)

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

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			Yes	No
a Transfers from the reporting foundation to a noncharitable exempt organization of				
(1) Cash.		1a(1)		No
(2) Other assets.		1a(2)		No
b Other transactions				
(1) Sales of assets to a noncharitable exempt organization.		1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization.		1b(2)		No
(3) Rental of facilities, equipment, or other assets.		1b(3)		No
(4) Reimbursement arrangements.		1b(4)		No
(5) Loans or loan guarantees.		1b(5)		No
(6) Performance of services or membership or fundraising solicitations.		1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.		1c		No
d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received				

[illegible]

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

b If "Yes," complete the following schedule		
(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.		
	*****	2018-10-31	*****
	Signature of officer or trustee	Date	Title

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

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☒	PTIN
	SHAWN P HANLON		2018-10-31		P00965923
	Firm's name ▶ PRICEWATERHOUSECOOPERS LLP				Firm's EIN ▶ 13-4008324
	Firm's address ▶ 600 GRANT STREET PITTSBURGH, PA 15219				Phone no (412) 355-6000

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d			
List and describe the kind(s) of property sold (e g , real estate, (a) 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)
68 LOGMEIN INC		2016-03-07	2017-07-28
550 SPDR TR UTS		2013-01-29	2017-07-28
500 STARBUCKS CORP COM		2017-08-08	2017-08-21
113 STARBUCKS CORP COM		2014-06-12	2017-08-21
206 CVS CORP		2017-08-08	2017-08-30
94 CVS CORP		2015-10-27	2017-08-30
250 AMERICAN AIRLINES GROUP INC		2016-11-17	2017-11-22
400 UNITED CONTINENTAL HOLDINGS		2016-03-07	2017-11-22
500 ALLIANT ENERGY CORP		2016-03-07	2017-12-11
200 UNITED CONTINENTAL HOLDINGS		2016-03-07	2017-12-11

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(e) Gross sales price	Depreciation allowed (f) (or allowable)	Cost or other basis (g) plus expense of sale	Gain or (loss) (h) (e) plus (f) minus (g)
7,986		5,989	1,997
135,726		82,500	53,226
26,519		27,540	-1,021
5,993		2,886	3,107
15,747		16,089	-342
7,186		4,941	2,245
12,186		11,395	791
23,916		23,208	708
22,515		17,408	5,107
12,838		11,604	1,234

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) 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	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
			1,997
			53,226
			-1,021
			3,107
			-342
			2,245
			791
			708
			5,107
			1,234

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d			
List and describe the kind(s) of property sold (e g , real estate, (a) 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)
100 SPDR TR UTS		2013-01-29	2017-12-18
700 MICROCHIP TECHNOLOGY INC		2016-03-07	2018-02-26
400 MONDELEZ INTERNATIONAL INC		2016-03-07	2018-02-26
150 ALLIANCE DATA SYS CORP		2016-03-07	2018-03-05
500 ALLIANT ENERGY CORP		2016-03-07	2018-03-05
500 SECTOR SPDR TR SHS BEN		2016-03-07	2018-03-05
356 PROCTER & GAMBLE CO		2016-03-07	2018-03-13
CAPITAL GAIN DIVIDENDS	P		

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h			
(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)
26,835		15,000	11,835
59,814		33,346	26,468
17,592		15,428	2,164
34,825		32,954	1,871
19,375		17,408	1,967
26,824		25,948	876
28,284		28,196	88
			36

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l			
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) 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	
			11,835
			26,468
			2,164
			1,871
			1,967
			876
			88

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation				
(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
REGIONS BANK	TRUSTEE 1	20,479		
1626 RINGLING BLVD SUITE 200 SARASOTA, FL 34236				
PHILIP DELANEY	BOARD MEMBER 1	0		
1515 RINGLING BLVD SUITE 200 SARASOTA, FL 34236				
SAMUEL GAY JR	BOARD MEMBER 1	0		
12 BISHOPSCOURT RD OSPREY, FL 34229				
JEFFREY JONES	BOARD MEMBER 1	0		
5318 ASHLEY PKWY SARASOTA, FL 34241				
CAROLYN JONES	EXECUTIVE DIRECTOR 1	6,900		
5318 ASHLEY PKWY SARASOTA, FL 34241				
GAIL STAIB	BOARD MEMBER 1	0		
1626 RINGLING BLVD SARASOTA, FL 34236				
JEREMIAH JONES	BOARD MEMBER 1	0		
4018 TEALE AVE SAN JOSE, CA 951173432				
DALE SMOOT	BOARD MEMBER 1	0		
1626 RINGLING BLVD SARASOTA, FL 34236				

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>				
TAKE STOCK IN CHILDREN PO BOX 48186 SARASOTA, FL 34230	NONE	PC	SPONSORSHIP	5,000
CHILDREN'S GUARDIAN FUND PO BOX 49722 SARASOTA, FL 34230	NONE	PC	NORMALCY & ENRICHMENT	5,000
VAN WEZEL FOUNDATION 777 NORTH TAMIAMI TRAIL SARASOTA, FL 34236	NONE	PC	SCHOOLTIME PERFORMANCES	1,000
Total ▶ 3a				94,500

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>				
CHILDREN FIRST INC 1723 NORTH ORANGE AVE SARASOTA, FL 34234	NONE	PC	FAMILIES FIRST, INSTITUTE	12,500
TIDEWELL5955 RAND BLVD SARASOTA, FL 34238	NONE	PC	TOGETHER FOR FAMILIES	5,000
FLORIDA POLYTECHNIC UNIVERSITY 4700 RESEARCH WAY LAKELAND, FL 33805	NONE	PC	GENERAL OPERATING PURPOSES	36,000
Total ▶ 3a				94,500

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>				
EASTER SEALS OF SOUTHWEST FLORIDA 350 BRADEN AVE SARASOTA, FL 34243	NONE	PC	GENERAL SUPPORT GRANT	5,000
EDUCATION FOUNDATION OF SARASOTA COUNT 1960 LANDINGS BLVD SUITE 120 SARASOTA, FL 34231	NONE	PC	GENERAL SUPPORT GRANT	5,000
THE HAVEN4405 DESOTO RD SARASOTA, FL 34235	NONE	PC	GENERAL SUPPORT GRANT	10,000
Total 				94,500
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 Paid during the year				
BIG BROTHERS BIG SISTERS OF SARASOTA 2831 RINGLING BLVD A-201 SARASOTA, FL 34237	NONE	PC	MENTORING CHILDREN OF	10,000
Total ▶ 3a				94,500

TY 2017 Accounting Fees Schedule**Name:** EVALYN SADLIER JONES FOUNDATION 1955000059**EIN:** 65-6156449**Accounting Fees Schedule**

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREPARATION FEE (NON-ALLOC	1,800			1,800

TY 2017 Investments Corporate Stock Schedule

Name: EVALYN SADLIER JONES FOUNDATION 1955000059
EIN: 65-6156449

Name of Stock	End of Year Book Value	End of Year Fair Market Value
AT&T INC		
ALASKA AIR		
ALLIANCE DATA		
ALLIANT CORP		
ALPHABET INC		
AMAZON		
APPLE INC		
B/E AEROSPACE		
BOEING CO		
CVS HEALTH		
CHEVRON CORP		
CITRIX SYSTEM INC		
WALT DISNEY CO		
EOG RES INC		
EXPRESS HOLDING CO		
EXXON MOBIL		
FACEBOOK INC		
GENERAL ELECTRIC		
HOME DEPOT INC		
ILLINOIS TOOL WORKS		
INTUIT INC		
JP MORGAN		
MCDONALDS CORP		
MERCK & CO		
MICROSOFT CORP		
MICROCHIP TECHNOLOGY		
MONDELEZ INTERNATIONAL		
PFIZER INC		
PRICELINE GROUP		
PROCTER & GAMBLE		

Name of Stock	End of Year Book Value	End of Year Fair Market Value
SCHLUMBERGER LTD		
STARBUCKS CORP		
TARGET CORP		
3M CO		
UNITED CONTINENTAL HOLDINGS IN		
VERIZON COMM		
VISA INC		
WEC ENERGY GROUP		
WASTE MANAGEMENT INC		
WILLIAMS COS INC		
ISHARES S & P MID CAP		
SPDR S & P 500 ETF		
SPDR CONSUMER STAPLES		
SPDR CONSUMER DISC		
SPDR AMEX IND		
VANECK VECTORS HIGH YIELD MUNI		
ALPHABET INC CL C		
AMGEN INC		
ALPHABET INC CA-CL A		
AMERICAN AIRLINES GROUP		
EMERGING MRKTS INTERNET & EC		
ISHARES CORE MSCI EMERGING MKT		
ISHARES INTERNATIONAL SELECTD		
ISHARES MSCI EAFE ETF		
ISHARES MSCI EMERGING MARKETS		
ISHARES RUSSELL 1000 ETF		
ISHARES U.S. AEROSPACE & DEFEN		
LOGMEIN INC		
ROCKWELL COLLINS INC		
SPDR ETF		

Name of Stock	End of Year Book Value	End of Year Fair Market Value
VANGUARD TOTAL INTERNATIONALS		

TY 2017 Investments - Other Schedule

Name: EVALYN SADLIER JONES FOUNDATION 1955000059
EIN: 65-6156449

Investments Other Schedule 2

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
88579Y101 3M CO	AT COST	27,239	33,442
30303M102 FACEBOOK INC	AT COST	26,620	48,580
774341101 ROCKWELL COLLINS INC	AT COST	21,109	29,226
78462F103 SPDR TR UTS	AT COST	60,000	108,512
02079K305 ALPHABET INC/CA	AT COST	23,599	33,876
464287234 ISHARES MSCI EMERGIN	AT COST	55,986	56,329
177376100 CITRIX SYS INC COM	AT COST	23,923	41,936
02079K107 ALPHABET INC	AT COST	19,823	33,470
097023105 BOEING COMPANY	AT COST	40,287	100,653
166764100 CHEVRONTXACO CORP	AT COST	26,387	38,055
26875P101 EOG RES INC	AT COST	33,281	49,772
461202103 INTUIT INC COM	AT COST	29,742	61,292
46625H100 J P MORGAN CHASE & C	AT COST	13,566	26,050
594918104 MICROSOFT CORP COM	AT COST	30,816	59,166
92826C839 VISA INC	AT COST	36,085	66,225
037833100 APPLE COMPUTER INC C	AT COST	13,138	37,022
464288760 ISHARES DJ US AEROSP	AT COST	25,326	30,795
512807108 LAM RESH CORP COM	AT COST	20,385	22,471
81369Y704 SECTOR SPDR TR	AT COST	32,304	42,978
92939U106 WEC ENERGY GROUP INC	AT COST	28,475	32,325
94106L109 WASTE MANAGEMENT INC	AT COST	28,490	40,670
464287465 ISHARES MSCI EAFE IN	AT COST	32,958	33,485
46434G103 ISHARES CORE MSCI EM	AT COST	150,353	136,526
580135101 MC DONALDS CORPORATI	AT COST	25,757	31,338
78464A862 SPDR S&P SEMICONDUCT	AT COST	8,196	10,838
921909768 VANGUARD TOTAL INTL	AT COST	9,891	10,279
437076102 HOME DEPOT INC USD 0	AT COST	22,805	39,020
464288448 ISHARES DJ EPAC SEL	AT COST	16,230	16,025
969457100 WILLIAMS CO INC	AT COST	28,573	40,665
452308109 ILLINOIS TOOL WORKS	AT COST	24,425	34,635

Investments Other Schedule 2

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
031162100 AMGEN INC	AT COST	14,606	18,459
464287606 ISHARES S&P MIDCAP 4	AT COST	47,700	67,434
464287622 ISHARES RUSSELL 1000	AT COST	12,792	15,198
110448107 BRITISH AMERICAN TOB	AT COST	25,648	20,180
151020104 CELGENE CORP	AT COST	32,361	23,826
464287192 ISHARES DJ U.S. TRNS	AT COST	16,849	18,623
81369Y407 SECTOR SPDR TR SHS B	AT COST	38,323	54,650
92189F767 E T F VANECK VECTORS	AT COST	10,123	8,274
023135106 AMAZON COM INC	AT COST	37,737	101,988
09857L108 BOOKING HOLDINGS INC	AT COST	25,926	40,542
301505889 ENERGING MARKETS INT	AT COST	11,222	12,845

TY 2017 Legal Fees Schedule**Name:** EVALYN SADLIER JONES FOUNDATION 1955000059**EIN:** 65-6156449

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
NON-ALLOCABLE LEGAL FEES	2,925			2,925

TY 2017 Other Decreases Schedule**Name:** EVALYN SADLIER JONES FOUNDATION 1955000059**EIN:** 65-6156449

Description	Amount
ROUNDING	118
MF TIMING ADJUSTMENT	279

TY 2017 Other Expenses Schedule**Name:** EVALYN SADLIER JONES FOUNDATION 1955000059**EIN:** 65-6156449**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OTHER NONALLOCABLE EXPENSES -	6	6		0

TY 2017 Other Income Schedule

Name: EVALYN SADLIER JONES FOUNDATION 1955000059

EIN: 65-6156449

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
FEDERAL TAX REFUND	26	0	

TY 2017 Other Professional Fees Schedule**Name:** EVALYN SADLIER JONES FOUNDATION 1955000059**EIN:** 65-6156449

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MGMT FEES-SUBJECT	5,223	5,223		
BOOKKEEPING FEES	6,900			6,900

TY 2017 Taxes Schedule**Name:** EVALYN SADLIER JONES FOUNDATION 1955000059**EIN:** 65-6156449

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES ON QUALIFIED FOR	153	153		0
FOREIGN TAXES ON NONQUALIFIED	64	64		0
ESTIMATED TAXES PAID	280	0		0