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

2949132105806

Department of the Treasury Internal Revenue Service

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

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Open to Public Inspection

	For ca	alendar year 2017 or tax year beginning	07/	['] 01 ,2017 ,	and ending	9	06/30, 20 18
•	Name	of foundation				A Employer identif	ication number
	EM]	LY VAN NUYS CHARITABLE REMAI	INDER TRUST			95-	6587698
•		per and street (or P O box number if mail is not delivered			Room/suite	B Telephone numb	
						1 '	
	PO	BOX 45174		İ		31	.0-550-6454
3 2018	City o	r town, state or province, country, and ZIP or foreign pos	stal code				1
5 0		·			,	C If exemption applica	tion is
က	SAN	FRANCISCO, CA 94145-0174				pending, check here	
		eck all that apply Initial return	Initial return	of a former p	ublic charity	D 1 Foreign organizat	ions shock hara
2	•	Final return	Amended ret			2 Foreign organizat	
\geq		Address change	Name change	e		85% test, check h	
	1 Che	eck type of organization X Section 501					
POSTMARK DATE		Section 4947(a)(1) nonexempt charitable trust	Other taxable pr		ion	E If private foundation	status was terminated
			unting method X Ca			7	
		i —	ther (specify)				n a 60-month termination)(1)(B), check here .
Ž			column (d) must be on ca	sh basis.)		-	
'হ্ন।		Analysis of Revenue and Expenses (The				· L · · · · · · · · · · · · · · · · · · 	(d) Disbursements
Ĭ⊈\ .		total of amounts in columns (b), (c), and (d)	(a) Revenue and expenses per	(b) Net inve		(c) Adjusted net	for charitable purposes
		may not necessarily equal the amounts in column (a) (see instructions))	books	incom	e	income	(cash basis only)
1:	1	Contributions, gifts, grants, etc , received (attach schedule) .					
· /-	2	Check Y if the foundation is not required to					
	3	Interest on savings and temporary cash investments-					
2019	2 4	Dividends and interest from securities	554,888.	55	4,561.	_	STMT 1
7	, 5a	Gross rents			7,55		
0	h	Net rental income or (loss)				MEC	
ಬ್	6a	Net gain or (loss) from sale of assets not on line 10	836,921.			B NOV T	TVED
2	b	Gross sales price for all assets on line 6a 1,577,936.				NOV 1	
Z,	7	Capital gain net income (from Part IV, line 2) .		83	6,921.	1	2018 8
SCANNED JAN 3	8	Net short-term capital gain				L 000	
Ш	9	Income modifications				SOUEN	
Z	10a	Gross sales less returns and allowances					<u> </u>
Z	Ь	Less Cost of goods sold .					7
\circ	C	Gross profit or (loss) (attach schedule)					
S	11	Other income (attach schedule)	25.		25.	25.	STMT 2
-	12	Total. Add lines 1 through 11	1,391,834.		1,507.	25.	
	13	Compensation of officers, directors, trustees, etc	172,353.	12	9,265.		43,088
g	14	Other employee salaries and wages			NONE	NONE NONE	
Š	15	Pension plans, employee benefits			NONE	NONE NONE	
							
ц	Ь	Accounting fees (attach schedule) STMT. 3.	1,150.		NONE	<u>NONE</u>	1,150
	c	Other professional fees (attach schedule)					
1	17	Interest					<u> </u>
.0	18	Taxes (attach schedule) (see instructions, 4.	26,336.		3,027.		<u> </u>
Ë	19	Depreciation (attach schedule) and depletion.	4.				
7	20	Occupancy					
7	b c 17 18 19 20 21 22 23 24	Travel, conferences, and meetings			NONE	NONE	
ä	22	Printing and publications			. NONE	NONE	
2	23	Other expenses (attach schedule) STMT. 5.	10.				10
4	24	Total operating and administrative expenses			, ,,,	3703	44 010
٥	3	Add lines 13 through 23	199,853.	13:	2,292.	NONE	44,248
C		Contributions, gifts, grants paid	994,225.	- 17.	2 202	37037	994,225
_	26	Total expenses and disbursements Add lines 24 and 25	1,194,078.	13	2,292.	NONE	1,038,473
	27	Subtract line 26 from line 12	100 000				
	1	Excess of revenue over expenses and disbursements	197,756.	1 05	2 21 5		
	1	Net investment income (if negative, enter -0-)		1,25	9,215.	25.	
	1 0	Adjusted net income (if negative, enter -0-).	l		1	/ ን .l	•

JSA For Paperwork Reduction Act Notice, see instructions. 7E1410 1 000 FJ3726 L674 11/01/2018 14:20:13

		Dalamas Obsessio	Attached schedules and amounts in the	Beginning of year		of year
	art II	Dalance Sheets	description column should be for end-of-year amounts only (See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value
			ng	200.001	250 444	050 666
			ash investments	390,334.	252,666	252,666
				-		
			tful accounts -		<u> </u>	
						_
			tful accounts 🕨			
	1 ~					-
			officers, directors, trustees, and other			
			sch schedule) (see instructions)			 -
			ceivable (attach schedule) NONE			
s						
Assets			e			
Ass			government obligations (attack FCM Jule).	5,160.	4,763	. 4,735
_			stock (attach schedule) . STMT .7.	3,294,316.	3,060,486	
		· · · · · · · · · · · · · · · · · · ·	bonds (attach schedule)	3/231/320.	3/000/100	37,100,700
	11	Investments - land, building				_ 1
		and equipment basis Less accumulated deprecia	tion ▶			
	12	(attach schedule)	loans			
	13	Investments - other (attachments - other (attachments - other)	ch schedule) STMT .9	9,216,024.	9,785,677	. 15,867,079
	14	Land, buildings, and equipment basis	>			
		Less accumulated deprecia-	tion			
	15	(attach schedule) Other assets (describe >	STMT 10)	1,188.	1,188	. 200
	16	Total assets (to be	completed by all filers - see the			
			ige 1, item l)	12,907,022.	13,104,780	. 24,915,307
	17	Accounts payable and a	crued expenses			
es	19	Deferred revenue				
≣	20	Loans from officers, director	s, trustees, and other disqualified persons.		-	_
Liabilities	21	Mortgages and other not	tes payable (attach schedule)			_ 1
۳	22	Other liabilities (describe	▶ }}			_
_			s 17 through 22)		NON	<u> </u>
"			SFAS 117, check here			
ë		•	hrough 26, and lines 30 and 31			1
Balances	24					-
Ba	25	· ·				-
덛	26	Permanently restricted .				-
Ē		Foundations that do not and complete lines 27 t	t follow SFAS 117, check here X			
Net Assets or Fund	27	•		12,907,022.	13,104,780	, , ,
ţ	27 28	•	pal, or current funds	12/30//022/	23/202//00	j
SSe	29		sted income, endowment, or other funds			1
۲	30	• .	balances (see instructions)	12,907,022.	13,104,780]
Š	31		net assets/fund balances (see			
_				12,907,022.	13,104,780	
Р			ges in Net Assets or Fund Balan			<u> </u>
			alances at beginning of year - Part I		must agree with	
			on prior year's return)			12,907,022.
2			ine 27a	`		197,756.
			ed in line 2 (itemize) ► ROUNDING		3	2.
4	Add	lines 1, 2, and 3			4	13,104,780.
5	Decr	eases not included in	line 2 (itemize) ▶		5	
6	Tota	I net assets or fund ba	lances at end of year (line 4 minus li	ne 5) - Part II, column (b), line 30 6	13,104,780.

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Part IV Capital Gair	ns and Losses for Tax on Inve	estment Income			
(a) List and o	describe the kind(s) of property sold (for e	xample, real estate,	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1 a PUBLICLY TRADEI	SECURITIES		D - Donation		
b					
c					
d					
е					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale		(h) Gain or (lo ((e) plus (f) min	
a 1,577,936.		741,015.			836,921.
b					· · · · · · · · · · · · · · · · · · ·
С					
d					
e					
Complete only for assets	showing gain in column (h) and owned b	by the foundation on 12/31/69.		Gains (Col (h) ga	
(ı) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	col	(k), but not less t Losses (from co	
a					836,921.
b				·	
С					
d					
e					
2 Capital gain net incom	le or (net capital loss)	ain, also enter in Part I, line 7 oss), enter -0- in Part I, line 7	2		836,921.
	gain or (loss) as defined in sections				
	Part I, line 8, column (c) See ins				
	Under Section 4940(e) for Red		3		
	or the section 4942 tax on the distrib		ase perio	d ⁷	Yes X No
	sn't qualify under section 4940(e). D		20 204 00	trios	
1 Enter the appropriate	amount in each column for each yea		ig any en	(d)	
Base period years Calendar year (or tax year beginning in	<u> </u>	(c) Net value of noncharitable-use assets		Distribution ra (col (b) divided by	col (c))
2016	1,045,895.	22,397,284.			0.046697
2015	1,168,383.	21,048,270.	ļ		0.055510
2014	1,184,151.	22,594,108.			0.032410
2013	1,058,850.	21,569,110. 19,288,889.			0.049091
2012	955,765.	19,200,009.	 		0.043330
0 T.A.I. (1 4 1			2		0.253258
	n (d)		-		0.233230
=	atio for the 5-year base period - divid ne foundation has been in existence		3		0.050652
4 Enter the net value of	noncharitable-use assets for 2017 fr	rom Part X, line 5	4	24,	436,460.
5 Multiply line 4 by line	3		5	1,	237,756.
6 Enter 1% of net invest	ment income (1% of Part I, line 27b)		6	· · · · · · · · · · · · · · · · · · ·	12,592.
7 Add lines 5 and 6			7	1,	250,348.
8 Enter qualifying distrib	outions from Part XII, line 4 r greater than line 7, check the box		8 that part		038,473. x rate. See the
Part VI instructions.			•	-	

Par	t 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			<u> </u>
	meaning of section 512(b)(13)? If "Yes," attach schedule See instructions	11		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	12		<u> </u>
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	L
	Website address ► N/A			
14	The books are in care of ► MUFG UNION BANK, N.A. Telephone no ► (858) 551	<u>-475</u>	0	
	Located at ▶ 7807 GIRARD AVENUE, LA JOLLA, CA ZIP+4 ▶ 92037			т- т
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	_	Yes	No
16	At any time during calendar year 2017, did the foundation have an interest in or a signature or other authority	46	res	
	over a bank, securities, or other financial account in a foreign country?	16	l	- X
	See the instructions for exceptions and filing requirements for FinCEN Form 114 If "Yes," enter the name of		-	
Dov	the foreign country	<u></u>		
Par	t VII-B Statements Regarding Activities for Which Form 4720 May Be Required		Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			
1a	During the year, did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person?			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a			
	disqualified person?			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?			
	(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)?			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the			<u> </u>
	foundation agreed to make a grant to or to employ the official for a period after			Ì
	termination of government service, if terminating within 90 days)			
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	_1b		X
	Organizations relying on a current notice regarding disaster assistance, check here	i i		
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that	<u> </u>	—	
	were not corrected before the first day of the tax year beginning in 2017?	1c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private	ļ		
	operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
а	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?	[
	,			
h	If "Yes," list the years \(\)			
U	(relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to			ŀ
	all years listed, answer "No" and attach statement - see instructions)	2b		X
С	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			i
	at any time during the year?			
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	<u> </u>		لــا
	foundation had excess business holdings in 2017)	3b		37
	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its	45		
	charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2017?	4b rm 99	A DE	

Yes carry on, Yes cribed in Yes ucational Yes r the exceptions dections The tax Yes premiums Yes r the contract? Yes cribed in Yes r the exceptions dections Yes premiums Yes premiums Yes premiums Yes the contract? Yes ransaction? Yes ransaction? Yes ransaction? Yes	X No X No X No X No Escribed in No X No Escribed in No No X No Escribed in No R No Escribed in No R No R No Escribed in No R	5b 6b 7b es,	X
carry on, Yes Yes cribed in Yes ucational Yes r the exceptions de ctions Yes remains Yes ransaction? Yes ransaction? Inagers, Highly I	X No X No X No Escribed in No X No Escribed in No No X No Escribed in No Escribed in No Escribed in Escri	6b 7b es,	X
Yes cribed in Yes cribed in Yes ucational Yes r the exceptions dections the tax Yes respectively Yes Yes Yes Yes Yes Yes Yes respectively Yes	X No X No Escribed in No No X No Paid Employe S. Utions to nefit plans (e) E	6b 7b es,	X
Yes cribed in Yes ucational Yes r the exceptions detions The tax Yes premiums Yes trontract? Yes ction? Yes	X No X No Escribed in No No X No Paid Employe S. Utions to nefit plans (e) E	6b 7b es,	X
Yes cribed in Yes ucational Yes r the exceptions detions The tax Yes premiums Yes trontract? Yes ction? Yes	X No X No escribed in No No X No X No Except Section 10 X No X No Except Section 10 (e) Except Section	6b 7b es,	X
ribed in Yes ucational Yes ucational Yes rethe exceptions detions Yes rethe tax Yes premiums Yes it contract? Yes ction? Yes ransaction? Yes ransaction? Yes	X No escribed in No X No X No X No Daid Employe S. (e) Entire plans	6b 7b es,	X
r the exceptions dections	X No escribed in No X No X No X No Daid Employe S. (e) Entire plans	6b 7b es,	X
r the exceptions dections	No X No X No Daid Employe S. Utions to nefit plans (e) E	6b 7b es,	X
r the exceptions dections	No X No X No Daid Employe S. Utions to nefit plans (e) E	6b 7b es,	X
r the exceptions dections	No X No X No Paid Employe S. Utions to nefit plans (e) E	6b 7b es,	X
remiums Yes t contract? Transaction? Transaction? Transaction? Transaction?	No X No X No A No Paid Employe S. Utions to nefit plans (e) E	6b 7b es,	X
premiums	No X No X No Paid Employe S. Utions to nefit plans (e) E	7b es,	X
premiums Tes it contract? ction? Transaction? Transaction? Transaction? Transaction?	X No X No Paid Employe S. Utions to nefit plans (e) E	7b es,	X
premiums Yes it contract? ction? Yes ransaction?	X No X No Paid Employe S. Utions to nefit plans (e) E	7b es,	X
premiums Yes it contract? ction? Yes ransaction?	X No Paid Employe s. utions to nefit plans (e) E	7b es,	X
Yes it contract? ction? Yes iransaction? inagers, Highly I	X No Paid Employe s. utions to nefit plans (e) E	7b es,	X
Yes it contract? ction? Yes iransaction? inagers, Highly I	X No Paid Employe s. utions to nefit plans (e) E	7b es,	X
it contract? ction? Yes ransaction? inagers, Highly I	Paid Employe S. utions to nefit plans (e) E	7b es,	X
ransaction? inagers, Highly I	Paid Employe S. utions to nefit plans	es,	
ransaction? inagers, Highly I	Paid Employe S. utions to nefit plans	es,	
ransaction? inagers, Highly I	Paid Employe S. utions to nefit plans	es,	
	S. utions to nefit plans		
n. See instruction	nefit plans (e) E	xpense accou	
	nefit plans (e) E	Expense accou	
ation (d) Contribu	nent plans		nt
d, employee ber and deferred co	ompensation [her allowance	; · · · ·
2,353.	-0-		-0-
			_
on line 1 - see	instructions).	If none, e	nter
(d) Contrib	utionsto		
ation employee	benefit (e) E	xpense accou her allowance:	nt,
compen			
-0-	-0-		-0-
	i		
	1		
		NONE	
	-0-	-00-	-00-

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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Emploand Contractors (continued)	
3 Five highest-paid independent contractors for professional services. See instructions. If none, enter "NON	E."
(a) Name and address of each person paid more than \$50,000 (b) Type of service	(c) Compensation
NONE	
	NONE
	
Total number of others receiving over \$50,000 for professional services	NONE
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
1NONE	
2	
	,
· · · · · · · · · · · · · · · · · · ·	
3	1
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 NONE	
	!
4	
All other program-related investments. See instructions	
3 NONE	
Total. Add lines 1 through 3	200 05

Par	Minimum Investment Return (All domestic foundations must complete this see instructions.)	part. Foreign found	ations,
1	Fair market value of assets not used (or held for use) directly in carrying out charital	ble, etc.,	
	purposes		
а	a Average monthly fair market value of securities	1a	24,411,341.
b	b Average of monthly cash balances	1b	<u>'.</u> 397,248.
С	c Fair market value of all other assets (see instructions)		NONE
d	d Total (add lines 1a, b, and c)	1d	24,808,589.
· е			
	1c (attach detailed explanation)		
2	Acquisition indebtedness applicable to line 1 assets		NONE
3	Subtract line 2 from line 1d		24,808,589.
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amo	ount, see	
	Instructions)	4	372,129.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part	V, line 4 5	24,436,460.
6	Minimum investment return. Enter 5% of line 5		1,221,823.
Par	Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private open	rating foundations	
	and certain foreign organizations, check here ▶ and do not complete this part.)		
1	Minimum investment return from Part X, line 6	<u>1</u>	1,221,823.
2 a	a Tax on investment income for 2017 from Part VI, line 5 2a	25,184.	
b			
С		2c	25,184.
3	Distributable amount before adjustments. Subtract line 2c from line 1		1,196,639.
4	Recoveries of amounts treated as qualifying distributions	1 1	NONE
5	Add lines 3 and 4	5	1,196,639.
6	Deduction from distributable amount (see instructions)	6	NONE
7	Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on F		
	line 1		1,196,639.
Par	rt XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
а			1,038,473.
b		· —	
2	, , ,	1 1	
	purposes	2	NONE
3	Amounts set aside for specific charitable projects that satisfy the		
а	and the state of t		NONE NONE
b	The state of the s		NONE
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part X		1,038,473.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment		
	Enter 1% of Part I, line 27b See instructions		N/A
6	Adjusted qualifying distributions. Subtract line 5 from line 4		1,038,473.
	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years	when calculating v	vhether the foundation
	qualifies for the section 4940(e) reduction of tax in those years		

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Pa	rt XIII Undistributed Income (see instr	uctions)			
	Distributable amount for 2017 from Part XI,	(a) Corpus	(b) Years prior to 2016	(c) 2016	(d) 2017
•	line 7			_	1,196,639.
2	Undistributed income, if any, as of the end of 2017				-
	Enter amount for 2016 only.			NONE	
	Total for prior years 20,20,20		NONE		<u> </u>
	Excess distributions carryover, if any, to 2017				
а	From 2012 NONE	ł			
b	From 2013 NONE				
	From 2014 53,623.				
d	From 2015				
	From 2016 NONE				
f	Total of lines 3a through e	195,334.			
4	Qualifying distributions for 2017 from Part XII,				
	line 4 ▶ \$1,038,473.			NONE	
а	Applied to 2016, but not more than line 2a			NONE	<u></u>
b	Applied to undistributed income of prior years		NONE		
	(Election required - see instructions)		NONE		
С	Treated as distributions out of corpus (Election	NONE			
	required - see instructions)	NONE			1,038,473.
	Applied to 2017 distributable amount	NONE			1,030,173.
	Excess distributions carryover applied to 2017	158,166.			158,166.
5	(If an amount appears in column (d), the same	130/100.			1
_	amount must be shown in column (a))			İ	
0	Enter the net total of each column as indicated below.				
а	Corpus Add lines 3f, 4c, and 4e Subtract line 5	37,168.			
b	Prior years' undistributed income Subtract		,		
	line 4b from line 2b		NONE		
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)		NONE		
	tax has been previously assessed		NONE		<u></u>
d	Subtract line 6c from line 6b Taxable		NONE		
	amount - see instructions		NONE		<u></u>
-	4a from line 2a Taxable amount - see			NONE	
	instructions			NONE	
f	Undistributed income for 2017 Subtract lines				
	4d and 5 from line 1 This amount must be distributed in 2018				NONE
~	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)	NONE		1	
8	Excess distributions carryover from 2012 not				
	applied on line 5 or line 7 (see instructions)	NONE			
9	Excess distributions carryover to 2018.				
	Subtract lines 7 and 8 from line 6a	37,168.			
	Analysis of line 9				
	Excess from 2013 NONE				
	Excess from 2014 NONE				
	Excess from 2015				
е	Excess from 2017 NONE				5 990 PE (2017)

Form **990-PF** (2017)

Form	990-PF (2017)			95-	<u>-6587698</u>			Page 10
Pai	rt XIV Private Ope	erating Foundations	(see instructions a	and Part VII-A, ques	tion 9)		NOT	APPLICABI
1 a	If the foundation has	received a ruling or d	etermination letter the	at it is a private ope	erating	_		
	foundation, and the ruling	is effective for 2017, en	ter the date of the ruling	j	▶[
b	Check box to indicate v	whether the foundation	is a private operating	foundation described	in section	4942()(3) or	4942(j)(5)
٠.	Proceeding to the second above and	Tax year		Prior 3 years				(e) Total
z a	Enter the lesser of the ad- justed net income from Part	(a) 2017	(ь) 2016	(c) 2015	(d)	2014	1	(e) Total
	I or the minimum investment							
	return from Part X for each year listed.							
b	85% of line 2a						I	
	Qualifying distributions from Part					-	I	
	XII, line 4 for each year listed .							
d	Amounts included in line 2c not							
	used directly for active conduct of exempt activities					_		
е	Qualifying distributions made							
	directly for active conduct of							
	exempt activities Subtract line 2d from line 2c							
3	Complete 3s, b, or c for the					_		
а	"Assets" alternative test - enter							
_	(1) Value of all assets							
	(2) Value of assets qualifying							
	under section 4942(j)(3)(8)(i)							
b	"Endowment" alternative test-							
	enter 2/3 of minimum invest-							
	ment return shown in Part X, line 6 for each year listed						ļ	
C	'Support" alternative test - enter							
	(1) Total support other than						İ	
	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 sup-							
	port from an exempt organization	<u></u>						<u> </u>
	(4) Gross investment income.			<u> </u>	<u> </u>			
Par		tary Information (C		only if the founda	ation had	\$5,000 o	r more	in assets at
•		ring the year - see						
	Information Regarding List any managers of t	•		re than 2% of the to	tal contribut	tions receiv	ed by t	he foundation
	before the close of any						ca by t	ine roundation
	NONE							
b	List any managers of	the foundation who	own 10% or more o	of the stock of a cor	poration (or	an equally	y large	portion of the
	ownership of a partners	ship or other entity) of	which the foundation	n has a 10% or greate	r interest.		-	
	NONE							
	Information Regarding							
	Check here ► X if th	ne foundation only i	nakes contributions	to preselected char	ritable orga	inizations a	and doe	s not accept
	unsolicited requests fo			ants, etc., to individu	als or organ	nizations ur	nder oth	ier conditions,
	complete items 2a, b, c							
а	The name, address, and	telephone number of	r email address of the	person to whom app	olications sn	ould be add	iressea.	
b	The form in which appli	ications should be sub	mitted and information	on and materials they	should inclu	ıde		
	• •			•				
С	Any submission deadlin	nes						
	Any restrictions or lin	nitations on awards,	such as by geogra	aphical areas, charit	able fields,	kınds of	ınstıtutı	ons, or other
	factors							

Part XV Supplementary Information 3 Grants and Contributions Paid During	ng the Year or Appr	oved for F	uture Payment	
Recipient	If recipient is an individual,	Foundation		
Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	status of recipient	Purpose of grant or contribution	Amount
a Paid during the year	Of Substantial Contributor			
PASADENA HUMANE SOCIETY & SPCA				
361 SOUTH RAYMOND AVENUE PASADENA CA 91105	NONE	EXEMPT	CHARITABLE	3,000.
L.A. SOCIETY FOR THE PREV PREVENTION OF CRUEL				
5026 W JEFFERSON BLVD LOS ANGELES CA 90016	NONE	EXEMPT	CHARITABLE	3,000.
J.B. & EMILY VAN NUYS CHARITIES C/O DIANE WIN		TANKOW.	CVA DYMADI D	007 705
PO BOX 2946 PALOS VERDES PENINSULA CA 90274	NONE	EXEMPT	CHARITABLE	987,725.
BRAILLE INSTITUTE OF AMERICA, INC. ATTN: JOSE 741 N VERMONT AVE. LOS ANGELES CA 90029	NONE	EXEMPT	CHARITABLE	500.
			(
>				
Total		· · · · <u>· ·</u> ·	▶ 3a	994,225.
b Approved for future payment				
NONE				
	,			
Total			▶ 3b	

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Part XVI-A Analysis of Income-Produ			-12		
Enter gross amounts unless otherwise indicated	(a)	ated business income (b)	(c)	section 512, 513, or 514 (d)	(e) Related or exempt function income
1 Program service revenue	Business code	Amount	Exclusion code	Amount	(See instructions)
a					
b		_			
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments -			14	FE4 000	
4 Dividends and interest from securities			14	554,888.	
5 Net rental income or (loss) from real estate			 		
a Debt-financed property					_
b Not debt-financed property · · · · · · ·			 		
6 Net rental income or (loss) from personal property					
7 Other investment income			 	026 001	
8 Gain or (loss) from sales of assets other than inventory			18	836,921.	
9 Net income or (loss) from special events · · ·					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a		<u></u>			
ь <u>ROYALTY INCOME</u>			0	<u>25.</u>	
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)				1,391,834.	
13 Total. Add line 12, columns (b), (d), and (e)				13	1,391,834.
See worksheet in line 13 instructions to verify calcular XVI-B Relationship of Activities				·	
Explain below how each activity accomplishment of the foundation					
				- <u></u>	
				·	
					· - · - · · - · · · · · · · · · · · · · ·
		NOT APPLICABL	ĿΕ		
				<u> </u>	
		·			<u> </u>
			<u>. </u>		
	 ,	· · · · · · · · · · · · · · · · · · ·			
					
					5 QQQ DE (0047)

	Information F Exempt Orga		fers to and Transac	tions a	95-65876 nd Relations		harit	able	ge 1.
1 Did 1			age in any of the follow	ing with	any other orga	inization described	Π,	Yes	No
		than section 50	1(c)(3) organizations)	or in se	ction 527, re	lating to political	}		
_	nizations?				- t				
			oncharitable exempt org				1a(1)		X
							1a(1)	_	X
	r transactions								
(1) S	ales of assets to a nor	icharitable exempt (organization				1b(1)		Х
			exempt organization						X
			ets						<u>X</u>
									X
									X
(6) P	erformance of services	s or membership or	fundraising solicitations ther assets, or paid emp		• • • • • • • •		10(6)		<u> </u>
			complete the following					air m	
			given by the reporting						
			ent, show in column (d)						
(a) Line no	(b) Amount involved	(c) Name of nonch	aritable exempt organization	(d) C	Description of transf	ers, transactions, and shar	ıng arra	ngeme	nts
				_		· · · · · · · · · · · · · · · · · · ·			
		ļ	···						
		 		_					
				-		 .			
			· · · · · · · · · · · · · · · · · · ·	 -					
									
		 		 				_	
							_		
			· · · · · · · · · · · · · · · · · · ·						
-									
			ed with, or related to, o			organizations		_ [v	
descr	ribed in section 501(c)	(other than section	ed with, or related to, of 501(c)(3)) or in section			organizations	Ye	s X	No
descr	ribed in section 501(c) s," complete the follow	(other than section wing schedule.	501(c)(3)) or in section					s X	No
descr	ribed in section 501(c)	(other than section wing schedule.				organizations		s X] No
descr	ribed in section 501(c) s," complete the follow	(other than section wing schedule.	501(c)(3)) or in section					s X] No
descr	ribed in section 501(c) s," complete the follow	(other than section wing schedule.	501(c)(3)) or in section					s X] No
descr	ribed in section 501(c) s," complete the follow	(other than section wing schedule.	501(c)(3)) or in section					s X] No
descr	ribed in section 501(c) s," complete the follow	(other than section wing schedule.	501(c)(3)) or in section					s X] No

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P00642561

X

See instructions

Firm's EIN ► 13-5565207

Check

2018 self-employed

Phone no

Date

85004

11/01/

Here

Paid

Preparer

Use Only

officer or trustee

Print/Type preparer's name

BRADLEY N. SPRONG

► KPMG LLP

PHOENIX,

Firm's address ► 2020 N CENTRAL AVE, STE 700

ΑZ

TRUSTEE

- DIVIDENDS AND INTEREST FROM SECURITIES FORM 990PF, PART I

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME
USGI REPORTED AS NONQUALIFIED DIVIDENDS FOREIGN DIVIDENDS NONDIVIDEND DISTRIBUTIONS DOMESTIC DIVIDENDS U.S. GOVERNMENT INTEREST - FEDERAL & STA NONQUALIFIED FOREIGN DIVIDENDS NONQUALIFIED DOMESTIC DIVIDENDS	8,204. 70,226. 327. 311,929. 13,565. 150,293.	8,204. 70,226. 311,929. . 13,565. 150,293.
TOTAL	554,888.	554,561.

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INCOME	11 11 11 11
OTHER	
ı	H
\vdash	II
PART	
990PF,	
FORM	

•	
ADJUSTED NET INCOME	25.
NET INVESTMENT INCOME	25.
REVENUE AND EXPENSES PER BOOKS	25.
	TOTALS
DESCRIPTION	ROYALTY INCOME

FORM 990PF, PART I - ACCOUNTING FEES

CHARITABLE PURPOSES	1 1 1 1 1 1	1,150.	1,150.	
ADJUSTED NET INCOME] 1 1 1 1		NONE	H H H H H H H H H H H
NET INVESTMENT INCOME	 		NONE	
REVENUE AND EXPENSES PER BOOKS	1 1 1 1 1 1 1 1 1	1,150.	1,150.	11 11 11 11 11 11 11 11 11
DESCRIPTION	1	TAX PREPARATION FEE (NON-ALLOC	TOTALS	

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STATEMENT

- TAXES

FORM 990PF, PART I

STATEMENT

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	REVENUE	
	AND	NET
	EXPENSES	INVESTMENT
DESCRIPTION	PER BOOKS	INCOME
	1 1 1 1 1 1	1 1 1 1
FEDERAL TAX PAYMENT - PRIOR YE	5,285.	
FEDERAL ESTIMATES - PRINCIPAL	18,024.	
FOREIGN TAXES ON QUALIFIED FOR	2,232.	2,23
FOREIGN TAXES ON NONQUALIFIED	795.	161

27.	26,336.
. 2,232. . 795.	18,024. 2,232. 795.

TOTALS

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FORM 990PF, PART I - OTHER EXPENSES

REVENUE AND EXPENSES PER BOOKS

10.

CA FILING FEE

DESCRIPTION

10.

TOTALS

CHARITABLE PURPOSES

10.

10.

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EMILY VAN NUYS CHARITABLE REMAINDER TRUST

95-6587698

FORM 990PF, PART II - U.S. AND STATE OBLIGATIONS

	ENDING FMV .	4,735.
	ENDING BOOK VALUE	4,763. 4,763.
II	BEGINNING DOOK VALUE	5,160.
		TOTALS
	DESCRIPTION	GNMA 472685 7% 5/15/28

95-6587698

FORM 990PF, PART II - CORPORATE STOCK

DESCRIPTION	BEGINNING BOOK VALUE	ENDING BOOK VALUE	ENDING FMV
ALTRIA GROUP INC AMERICAN EXPRESS CO AMGEN INC ANALOG DEVICES INC ANALOG DEVICES INC ANALOG DEVICES INC ANALOG DEVICES INC AUTOMATIC DATA PROCESSING INC CHEVRON CORP COMMON STOCK COCA-COLA CO CONCAST CORP SPECIAL CL A CONAGRA BRANDS INC CONCOPHILLIPS COM DISNEY (WALT) COMPANY HOLDING DU PONT E I DE NEMOURS & CO EXXON MOBILE FISERV GENERAL DYNAMICS CORP GENERAL DYNAMICS CORP GENERAL DYNAMICS CORP GENERAL DYNAMICS CORP GENERAL GORP JOHNSON JPMORGAN CHASE & CO KIMBERLY CLARK CORP MCDONALDS CORP MCDONALDS CORP	221, 332. 77, 705. 98, 128. 62, 361. 52,090. 103,600. 26,758. 30,921. 30,921. 31,757. 57,538. 64,434. 110,335. 62,323. 122,140.	78,433. 109,386. 77,705. 85,473. 62,361. 52,090. 103,635. 98,603. 90,208. 3,757. 33,195. 64,434. 109,246. 60,345.	295,080. 312,345. 196,000. 369,180. 221,432. 227,574. 227,574. 131,240. 132,368. 282,987. 186,410. 487,750. 178,956. 242,680. 458,480.
PFIZER INC PHILLIPS 66 COM	2,94 2,91 2,91	2,97 2,91	79,35 78,61

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	ENDING FMV -	0,0 0,4	. 153,30 . 308,70	. 95,60 . 343,47	186,14	168,09		109,	5. 124,430. 3. 107,072.	131,84	8,790,6
,	ENDING BOOK VALUE	720	0,38	7,853,24	69,	2,59	0 9	4,01	103,899	49,69	3,060,48
	BEGINNING BOOK VALUE	52,963. 58,454. 90,772.	0,38	7,853,24	5,69	, 93	0,30	4,01 9,47	3,89		3,294,316
FORM 990PF, PART II - CORPORATE STOCK ====================================	DESCRIPTION	PINNACLE WEST CAP CORP PRAXAIR INC SCHLUMBERGER LTD	SCHWAB CHARLES CORP TEXAS INSTRS INC	UNITED PARCEL SERVICE CL B UNITEDHEALTH GROUP	VERIZON COMMUNICATIONS WASTE MGMT INC DEL	WEC ENERGY GROUP INC COM WELLS FARGO & CO	ALPHABET INC CAP STK CL A ALPHABET INC CAP STK CL C	PROCTER & GAMBLE CO TARGET CORP	EOG RES INC CITIGROUP INC COM	DOWDUPOINT INC COM	TOTALS

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STATEMENT

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FORM 990PF, PART II - OTHER INVESTMENTS

EMILY VAN NUYS CHARITABLE REMAINDER TRUST

	/ E 0 C D			
DESCRIPTION	COSI/ FMV CORF	BEGINNING BOOK VALUE	ENDING BOOK VALUE	END ING FMV
	 	1 1 1 1 1 1 1 1	1 1 1 1 1 1	!
AQR MGD FUTURES STRAT R6 #1528	Ö	62,76	62,76	46,24
ARBITRAGE FD	บ	55,99	60,42	63,56
EATON VANCE FLTG RT & HI	O	400,000.	400,000.	394,179.
EATON VANCE GLBL MACR ABSOL	U	16,41	16,41	96,04
COHEN	O	10,91	10,91	39,47
INTL	U	98,16	08,49	6,15
	ט	59,03	59,03	04,55
ISHARES MSCI EMERGING MKT	ပ	64,05	64,05	06,62
	ט	66,49	66,49	,125,03
RUSSEL	ပ	29,68	29,68	67,72
ISHARES S&P 500 GROWTH	U	72,50	72,50	,113,93
	บ	92,73	92,73	,486,75
ISHARES S&P MID CAP 400 GROWTH	U	78,92	78,92	64,25
	U	92,16	95,16	53,68
ISHARES TIPS BD ETF	ပ	67,25	67,25	82,17
PIMCO HIGH YIELD, INSTL	ບ	73,47	73,47	44,29
VNGRD ST TERM INVMT GRADE ADM	D	54,13	54,13	0,75
ONE AL TNV	บ	13,57	16,40	29,19
ASSET MAC OPP IS	U	14,33	68,79	73,19
MSCI EAFE GROWI	บ	22,74	87,72	38,84
CI EAFE VALI	บ	67,64	89,94	08,07
LOOMIS BOND	U	50,00	84,53	78,08
NTIAL TOTAL RTRN	ບົ	20,00	75,00	73,47
DODGE & COX INCOME FD #147	U		450,79	40,80
)T	TOTALS	9,216,024.	9,785,677.	15,867,079.
	11			

EMILY VAN NUYS CHARITABLE REMAINDER TRUST

	ENDING ENDING BOOK VALUE FMV .	1,178.	1,188.
	BEGINNING BOOK VALUE BOOK VALUE	1,178.	
FORM 990PF, PART II - OTHER ASSETS	DESCRIPTION	CA KINGS MI CA LOS ANGELES MI (1-4)	T

990PF, PART VII-B LINE 2b - SECTION 4942a2 EXPLANATION STATEMENT ______

THIS QUESTION DOES NOT APPLY. THE FOUNDATION DOES NOT HAVE ANY UNDISTRIBUTED INCOME FROM PRIOR YEARS.

RENT AND ROYALTY SUMMARY

, ,

PROPERTY	TOTAL INCOME	DEPLETION/ DEPRECIATION	OTHER EXPENSES	ALLOWABLE NET INCOME
CA LOS ANGELES MI(1-	25.	4.		21.
TOTALS	25.	4.	=========	21.