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

OMB No 1545-0052

Form 990-PF

2018

Department of the Treasury Internal Revenue Service

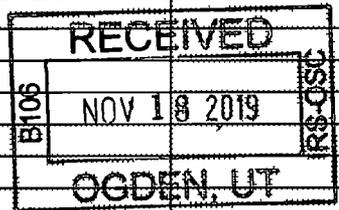
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Open to Public Inspection

For calendar year 2018 or tax year beginning , and ending

Name of foundation: BEN D. SPAGOLIO CHARITABLE TRUST C/O JAMES C. BOHORAD, TRUSTEE. Employer identification number: 13-7345617. Telephone number: 570-622-1811. City: POTTSVILLE PA 17901-7280.

Table with 5 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes. Rows include Contributions (4,000), Dividends (8,798), Total Revenue (23,449), Total Expenses (15,744), and Adjusted Net Income (7,705).



SCANNED JAN 16 2020

Operating and Administrative Expenses 02228364 DEC 05 2019

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<b>Part II Balance Sheets</b> Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions )		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	1 Cash – non-interest-bearing	307	4,464	4,464
	2 Savings and temporary cash investments	50,038	25,507	25,507
	3 Accounts receivable ▶ Less allowance for doubtful accounts ▶			
	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 (att 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) <b>See Stmt 6</b>	236,874	264,953	234,797
	c Investments – corporate bonds (attach schedule)			
	11 Investments – land, buildings, and equipment basis ▶ Less accumulated depreciation (attach sch ) ▶			
	12 Investments – mortgage loans			
	13 Investments – other (attach schedule)			
	14 Land, buildings, and equipment basis ▶ Less accumulated depreciation (attach sch ) ▶			
15 Other assets (describe )				
16 <b>Total assets</b> (to be completed by all filers – see the instructions Also, see page 1, item I)	287,219	294,924	264,768	
<b>Liabilities</b>	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 <b>Total liabilities</b> (add lines 17 through 22)	0	0	
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow SFAS 117, check here and complete lines 24 through 26, and lines 30 and 31.</b> ▶ <input type="checkbox"/>			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	<b>Foundations that do not follow SFAS 117, check here and complete lines 27 through 31</b> ▶ <input checked="" type="checkbox"/>			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg , and equipment fund			
29 Retained earnings, accumulated income, endowment, or other funds	287,219	294,924		
30 <b>Total net assets or fund balances</b> (see instructions)	287,219	294,924		
31 <b>Total liabilities and net assets/fund balances</b> (see instructions)	287,219	294,924		

**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	287,219
2 Enter amount from Part I, line 27a	2	7,705
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	294,924
5 Decreases not included in line 2 (itemize) ▶	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 30	6	294,924

**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)
<b>1a</b>	<b>WADDELL &amp; REED CAP GAIN DIST</b>			
<b>b</b>	<b>MID PENN BANK</b>			
<b>c</b>	<b>PUBLICLY TRADED SECURITIES</b>			
<b>d</b>				
<b>e</b>				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))	
<b>a</b>	<b>11,269</b>		<b>11,269</b>	
<b>b</b>	<b>1,455</b>		<b>1,455</b>	
<b>c</b>	<b>29,166</b>	<b>31,252</b>	<b>-2,086</b>	
<b>d</b>				
<b>e</b>				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any		
<b>a</b>			<b>11,269</b>	
<b>b</b>			<b>1,455</b>	
<b>c</b>			<b>-2,086</b>	
<b>d</b>				
<b>e</b>				
<b>2</b>	Capital gain net income or (net capital loss) <span style="font-size: small;">{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }</span>		<b>2</b>	<b>10,638</b>
<b>3</b>	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) See instructions If (loss), enter -0- in Part I, line 8 <span style="font-size: small;">}</span>		<b>3</b>	

**Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income**

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?  Yes  No

If "Yes," the foundation 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))
2017	<b>11,575</b>	<b>268,501</b>	<b>0.043110</b>
2016	<b>14,488</b>	<b>264,531</b>	<b>0.054769</b>
2015	<b>12,696</b>	<b>267,358</b>	<b>0.047487</b>
2014	<b>11,495</b>	<b>270,849</b>	<b>0.042441</b>
2013	<b>10,418</b>	<b>244,411</b>	<b>0.042625</b>

<b>2</b>	Total of line 1, column (d)	<b>2</b>	<b>0.230432</b>
<b>3</b>	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	<b>3</b>	<b>0.046086</b>
<b>4</b>	Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	<b>4</b>	<b>287,686</b>
<b>5</b>	Multiply line 4 by line 3	<b>5</b>	<b>13,258</b>
<b>6</b>	Enter 1% of net investment income (1% of Part I, line 27b)	<b>6</b>	<b>194</b>
<b>7</b>	Add lines 5 and 6	<b>7</b>	<b>13,452</b>
<b>8</b>	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	<b>8</b>	<b>12,355</b>

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	1	389
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	389
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)	4	0
5	<b>Tax based on investment income.</b> Subtract line 4 from line 3 If zero or less, enter -0-	5	389
6	Credits/Payments		
a	2018 estimated tax payments and 2017 overpayment credited to 2018	6a	
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	
8	Enter any <b>penalty</b> for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached	8	
9	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b>	9	389
10	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b>	10	
11	Enter the amount of line 10 to be <b>Credited to 2019 estimated tax</b> <input type="checkbox"/> <b>Refunded</b> <input type="checkbox"/>	11	

**Part VII-A Statements Regarding Activities**

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

N/A

2

**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		<input checked="" type="checkbox"/>
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		<input checked="" type="checkbox"/>
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ <b>N/A</b>	<input checked="" type="checkbox"/>	
14 The books are in care of ▶ <b>JAMES C. BOHORAD</b> Telephone no ▶ <b>570-622-1811</b> <b>P.O. BOX 1280</b> Located at ▶ <b>POTTSVILLE</b> PA ZIP+4 ▶ <b>17901-7280</b>		
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 ▶ <b>15</b>		<input type="checkbox"/>
16 At any time during calendar year 2018, 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 ▶		<input checked="" type="checkbox"/>

**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 ▶ <input type="checkbox"/> <b>N/A</b>		
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 2018? <b>N/A</b>		
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 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2018? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ 20 , 20 , 20 , 20		
b Are there any years listed in 2a for which the foundation is <b>not</b> 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 ) <b>N/A</b>		
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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If "Yes," did it have excess business holdings in 2018 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 2018 ) <b>N/A</b>		
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		<input checked="" type="checkbox"/>
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 2018?		<input checked="" type="checkbox"/>

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

<b>5a</b> During the year did the foundation pay or incur any amount to		<b>Yes</b>	<b>No</b>
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
<b>b</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 <i>Organizations relying on a current notice regarding disaster assistance, check here</i>	<b>N/A</b>	<input type="checkbox"/>	<b>5b</b>
<b>c</b> If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? If "Yes," attach the statement required by Regulations section 53.4945–5(d)	<b>N/A</b>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
<b>6a</b> Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
<b>b</b> Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870			<b>6b</b> <b>X</b>
<b>7a</b> At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
<b>b</b> If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?		<b>N/A</b>	<b>7b</b>
<b>8</b> Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	

**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. See instructions.**

(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
JAMES C. BOHORAD P.O. BOX 1280	POTTSVILLE PA 17901-7280	TRUSTEE 2.00	0	0

**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	(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. 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		▶

**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** (see instructions)

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	

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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	<b>263,217</b>
<b>b</b>	Average of monthly cash balances	<b>1b</b>	<b>28,850</b>
<b>c</b>	Fair market value of all other assets (see instructions)	<b>1c</b>	<b>0</b>
<b>d</b>	<b>Total</b> (add lines 1a, b, and c)	<b>1d</b>	<b>292,067</b>
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	<b>0</b>
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	<b>0</b>
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	<b>292,067</b>
<b>4</b>	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	<b>4</b>	<b>4,381</b>
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	<b>287,686</b>
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	<b>14,384</b>

**Part XI Distributable Amount** (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations, check here  and do not complete this part.)

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	<b>14,384</b>
<b>2a</b>	Tax on investment income for 2018 from Part VI, line 5	<b>2a</b>	<b>389</b>
<b>b</b>	Income tax for 2018 (This does not include the tax from Part VI)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	<b>389</b>
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	<b>13,995</b>
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	
<b>5</b>	Add lines 3 and 4	<b>5</b>	<b>13,995</b>
<b>6</b>	Deduction from distributable amount (see instructions)	<b>6</b>	
<b>7</b>	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	<b>13,995</b>

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

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
<b>a</b>	Expenses, contributions, gifts, etc. – total from Part I, column (d), line 26	<b>1a</b>	<b>12,355</b>
<b>b</b>	Program-related investments – total from Part IX-B	<b>1b</b>	
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	<b>12,355</b>
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions.	<b>5</b>	<b>0</b>
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	<b>12,355</b>

**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 2017	(c) 2017	(d) 2018
<b>1</b> Distributable amount for 2018 from Part XI, line 7				<b>13,995</b>
<b>2</b> Undistributed income, if any, as of the end of 2018				
<b>a</b> Enter amount for 2017 only			<b>12,112</b>	
<b>b</b> Total for prior years 20____, 20____, 20____				
<b>3</b> Excess distributions carryover, if any, to 2018				
<b>a</b> From 2013				
<b>b</b> From 2014				
<b>c</b> From 2015				
<b>d</b> From 2016				
<b>e</b> From 2017				
<b>f</b> Total of lines 3a through e				
<b>4</b> Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ <b>12,355</b>				
<b>a</b> Applied to 2017, but not more than line 2a			<b>12,112</b>	
<b>b</b> Applied to undistributed income of prior years (Election required – see instructions)				
<b>c</b> Treated as distributions out of corpus (Election required – see instructions)				
<b>d</b> Applied to 2018 distributable amount				<b>243</b>
<b>e</b> Remaining amount distributed out of corpus				
<b>5</b> Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a) )				
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5				
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b				
<b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
<b>d</b> Subtract line 6c from line 6b Taxable amount – see instructions				
<b>e</b> Undistributed income for 2017 Subtract line 4a from line 2a Taxable amount – see instructions				
<b>f</b> Undistributed income for 2018 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2019				<b>13,752</b>
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required—see instructions)				
<b>8</b> Excess distributions carryover from 2013 not applied on line 5 or line 7 (see instructions)				
<b>9</b> Excess distributions carryover to 2019 Subtract lines 7 and 8 from line 6a				
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2014				
<b>b</b> Excess from 2015				
<b>c</b> Excess from 2016				
<b>d</b> Excess from 2017				
<b>e</b> Excess from 2018				

**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 2018, enter the date of the ruling
- b** Check box to indicate whether the foundation is a private operating foundation described in section  4942(j)(3) or  4942(j)(5)

	Tax year		Prior 3 years		(e) Total
	(a) 2018	(b) 2017	(c) 2016	(d) 2015	
<b>2a</b> Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
<b>b</b> 85% of line 2a					
<b>c</b> Qualifying distributions from Part XII, line 4 for each year listed					
<b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities					
<b>e</b> Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
<b>3</b> Complete 3a, b, or c for the alternative test relied upon					
<b>a</b> "Assets" alternative test - enter					
<b>(1)</b> Value of all assets					
<b>(2)</b> Value of assets qualifying under section 4942(j)(3)(B)(i)					
<b>b</b> "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
<b>c</b> "Support" alternative test - enter					
<b>(1)</b> Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
<b>(2)</b> Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
<b>(3)</b> Largest amount of support from an exempt organization					
<b>(4)</b> Gross investment income					

**Part XV Supplementary Information (Complete this part only if the foundation 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) )  
**N/A**
- 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  
**N/A**
- 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., to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions.
- a** The name, address, and telephone number or email address of the person to whom applications should be addressed  
**JAMES C. BOHORAD, TRUSTEE 570-622-1811  
P.O. BOX 1280 POTTSVILLE PA 17901-7280**
- b** The form in which applications should be submitted and information and materials they should include  
**See Statement 7**
- c** Any submission deadlines  
**NONE**
- d** Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors  
**NONE**

**Part XV Supplementary Information (continued)**

**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a Paid during the year</b>				
<b>A Foundation of Philanthropic Funds</b> 520 8th Ave. New York NY 10018	N/A	501(c)(3)	Public charity	
<b>All Ages Read Together</b> 8 C S St. SW Leesburg VA 20175	N/A	501(c)(3)	For assistance with education	
<b>Almost Home Animal Sanctuary</b> 200 Limekiln Road Reading PA 19606	N/A	501(c)(3)	Public charity	
<b>ALS Association</b> 1275 K St. NW Washington DC 20005	N/A	501(c)(3)	Public charity	
<b>American Cancer Society</b> 16 N. 4th St. Minersville PA 17954	N/A	501(c)(3)	For assistance with cancer research	
<b>American Heart Association</b> 610 Community Way Lancaster PA 17603	N/A	501(c)(3)	Charitable	
<b>Arnold Delin Scholarship Fund</b> 17 Maple Ave., PO Box 130 Marlin PA 17951	N/A	501(c)(3)	For assistance with education	
<b>Artis - Naples</b> 5833 Pelican Bay Blvd. Naples FL 34108	N/A		For assistance with the arts	
<b>Ashland Public Library</b> 1229 Centre Street Ashland PA 17921	N/A	501(c)(3)	Public charity	
<b>Avenues</b> 2 Park Street Pottsville PA 17901	N/A	501(c)(3)	For assistance to the disabled	350
<b>Total</b>			▶ 3a	12,355
<b>b Approved for future payment</b>				
N/A				
<b>Total</b>			▶ 3b	

**Part XV Supplementary Information (continued)**

**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a Paid during the year</b>				
Avon 39 Walk to End Breast Cancer 1 Avon Plaza Rye NY 10580	N/A	501(c)(3)	Public charity	
Barefield Development Corporation 410 Laurel Boulevard Pottsville PA 17901	N/A	501(c)(3)	Public charity	
Big Brothers/Big Sisters 2202 N. Westshore Blvd. Tampa FL 33607	N/A	501(c)(3)	Public charity	
Big Impact Group of Schuylkill Cty. 23 Meadow Brook Drive Schuylkill Haven PA 17972	N/A	501(c)(3)	Charitable	125
Bishop's Annual Appeal PO Box F Allentown PA 18105	N/A	Church	For assistance with religion	
Blue Mountain Eagle Found 675 Reddale Road Orwigsburg PA 17961	N/A	501(c)(3)	For assistance with youth	
Blue Mountain Track Boosters 48 Red Mountain Lane New Ringgold PA 17960	N/A	Youth Sports	For assistance with youth sports	200
Blue Mountain PTO 685 Red Dale Road Orwigsburg PA 17961	N/A	School	For assistance with education	100
Borough of Orwigsburg Fire Dept PO Box 205 Orwigsburg PA 17961	N/A	Fire Co.	For assistance with fire fighting	
Boston College Law School 885 Centre Street Newton MA 02459	None	School	For assistance with education	200
<b>Total</b>				<b>▶ 3a</b>
<b>b Approved for future payment</b> N/A				
<b>Total</b>				<b>▶ 3b</b>

**Part XV** Supplementary Information (continued)

**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a</b> Paid during the year				
Boy Scouts of America 1325 N. Walnut Hill Lane Irving TX 75015	N/A	501(c)(3)	Public charity	
Brady Center to Prevent Gun Violenc 840 First Street NE Washington DC 20002	N/A	501(c)(3)	Public charity	
Bryn Mawr College 101 N. Merion Ave. Bryn Mawr PA 19010	N/A	School	For assistance with education	
Calderone Memorial Scholarship Fd Pottsville Pottsville PA 17901	N/A	501(c)(3)	For assistance with education	
Capt. Jason B. Jones Memorial Found 4605 Brookside Court Orwigsburg PA 17961	N/A	501(c)(3)	Public charity	200
Chabad Lubavitch 382 South Centre Street Pottsville PA 17901	N/A	Church	For assistance with religion	
Charles Baber Preservation Trust 200 South Second Street Pottsville PA 17901	N/A	501(c)(3)	Public charity	
Char Will German Shepherd Rescue 2 E. Railroad Ave. New Ringgold PA 17960	N/A	501(c)(3)	Charitable	250
Childhood Leukemia Foundation PO Box 21069 Lansing MI 48909	N/A	501(c)(3)	Public charity	
Children's Cancer Recovery Found PO Box 238 Hershey PA 17033	N/A	501(c)(3)	Public charity	
<b>Total</b>			▶ 3a	
<b>b</b> Approved for future payment				
N/A				
<b>Total</b>			▶ 3b	

**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> <b>Church World Service</b> 28006 Phillips Street Elkhart IN 46515	N/A	501(c) (3)	For assistance with religion	
<b>City of Pottsville/Yorkville Hose</b> West Norwegian St. Pottsville PA 17901	N/A	Municipality	For assistance with fire fighting	
<b>CMON-Golisano Children's Museum</b> 1508 Livingston Rd. Naples FL 34109	N/A	501(c) (3)	Public charity	
<b>Collier County Public Library</b> 2385 Orange Blossom Road Naples FL 34109	N/A	501(c) (3)	For assistance with education	
<b>Colorado Agency for Jewish Charitie</b> 300 S. Dahlia St. Denver CO 80246	N/A		For assistance with religion	
<b>Community Found of Collier Cty</b> 1100 Immokalee Road Naples FL 34110	N/A	501(c) (3)	Public charity	
<b>Conservancy of Southwest Florida</b> 1450 Merrihue Dr. Naples FL 34102	N/A		For assistance with science	
<b>Consumer Reports Found.</b> 101 Truman Ave. Yonkers NY 10703	N/A	501(c) (3)	For assistance with education	
<b>Crimson Tide Football Club</b> 2064 Mahantongo St. Pottsville PA 17901	N/A	501(c) (3)	Charitable	
<b>Crimson Tide Foundation</b> 410 Laurel Blvd. Pottsville PA 17901	N/A	501(c) (3)	Public charity	250
<b>Total</b>			▶ 3a	
b <i>Approved for future payment</i> N/A				
<b>Total</b>			▶ 3b	

**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> <b>Damon Runyan Cancer Research</b> 55 Broadway New York NY 10006	N/A	501(c)(3)	For assistance with cancer research	
<b>Da Vinci Science Center</b> 3145 Hamilton Blvd Byp Allentown PA 18103	N/A	501(c)(3)	For assistance with education	
<b>Debra of America</b> 16 E. 41st St. New York NY 10017	N/A		Charitable	
<b>Diakon Community Services</b> 118 S. Centre St., Ste. 1 Pottsville PA 17901	N/A		For assistance with research	
<b>Doctors Without Borders</b> Hagerstown Hagerstown MD 21741	N/A	501(c)(3)	For assistance with healthcare	
<b>Doc Wayne Youth Services Inc.</b> 418 Commonwealth Ave. Boston MA 02215	N/A	501(c)(3)	Public charity	
<b>Eagle Foundation</b> 45 Wilder Street Orwigsburg PA 17961	N/A	501(c)(3)	Public charity	
<b>ECO Energy Finance</b> 2307 15th St. NW Washington DC 20009	N/A		Charitable	
<b>Edison Museum</b> 2350 McGregor Blvd Fort Meyers FL 33901	N/A	501(c)(3)	For assistance with education	
<b>Elza Retina Welfare Organization</b> 139 Charles St. No. 348 Boston MA 02114-3282	N/A	501(c)(3)	Charitable	100
Total	▶ 3a			
b <i>Approved for future payment</i> N/A				
Total	▶ 3b			

**Part XV Supplementary Information** (continued)

**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i> <b>Everglade City School</b> 415 School Drive Everglades City FL 34139	N/A	School	For assistance with education	
<b>Father Walter Ciszek Prayer League</b> 231 Jardin St. Shenandoah PA 17976	N/A		For assistance with religion	
<b>First Candle</b> 2105 Laurel Bush Rd. Bel Air MD 21015	N/A		Charitable	
<b>First United Church of Christ</b> 110 S. Route 61 South Schuylkill Haven PA 17972	N/A	Church	For assistance with religion	
<b>First United Methodist Church</b> 223 Pike Street Port Carbon PA 17965	N/A	Church	For assistance with religion	
<b>Frances Hazel Reid Elementary School</b> 800 N. King St. Leesburg VA 20176	N/A	School	For assistance with education	
<b>Franklin &amp; Marshall College</b> 415 Harrisburg Ave. Lancaster PA 17604	N/A	School	For assistance with education	
<b>Gabriel Chamber Ensemble</b> P.O. Box 36 Orwigsburg PA 17961	N/A	501(c)(3)	For assistance with the arts	
<b>Girl Scouts of the Nation's Capital</b> 4301 Connecticut Ave. NW Washington DC 20008	N/A	501(c)(3)	Public charity	25
<b>Golisamo Children's Museum</b> 15080 Livingston Rd. Naples FL 34109	N/A	501(c)(3)	For assistance with education	
<b>Total</b>			▶ 3a	
b <i>Approved for future payment</i> N/A				
<b>Total</b>			▶ 3b	

**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> <b>Gulfshore Playhouse</b> 755 8th Ave. South Naples FL 34108	N/A		For assistance with the arts	
<b>Habitat for Humanity</b> PO Box 1729 Americus GA 31709	N/A	501(c) (3)	For assistance to under-privileged	
<b>Hawk Mountain Sanctuary</b> 1700 Hawk Mountain Road Kempton PA 19529	N/A	501(c) (3)	For assistance with wildlife preserv	
<b>Hillside SPCA</b> P.O. Box 233 Pottsville PA 17901	N/A	501(c) (3)	For assistance to animals	1,205
<b>Hodges University</b> 2655 Northbrooke Dr. Naples FL 34119	N/A	School	For assistance with education	
<b>Holocaust Museum of SW Florida</b> 4760 Tamiami Tr N Naples FL 34103	N/A	501(c) (3)	For assistance with education	
<b>Holy Cross Church</b> 99 Valley St. New Philadelphia PA 17951	N/A	Church	For assistance with religion	
<b>Hope Hospice c/o Hope Health</b> 765 Attucks Ln Hyannis MA 02610	N/A		Charitable	
<b>Hospice of Central Pennsylvania</b> 1320 Linglestown Rd. Harrisburg PA 17110	N/A	501(c) (3)	Public charity	
<b>Hospice of the Golden Isles</b> 1692 Glenco Parkway Brunswick GA 31525	N/A	501(c) (3)	Public charity	
Total			▶ 3a	
b <i>Approved for future payment</i> N/A				
Total			▶ 3b	

**Part XV Supplementary Information (continued)**

**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a Paid during the year</b>				
Immaculate Conception School 1 Washington Street Newburyport MA 01950	N/A	School	For assistance with education	
International Planned Parenthood 120 Wall Street New York NY 10269	N/A	501(c) (3)	For assistance with education	
James & Mary Edith Rhoades Found. P.O. Box 485 Pottsville PA 17901	N/A	501(c) (3)	Public charity	50
Janet Eich Library 111 Pike Street Port Carbon PA 17965	N/A	501(c) (3)	Public charity	
Juvenile Diabetes Research Found. 26 Broadway New York NY 10004	N/A	501(c) (3)	For assistance with diabetes researc	150
Kilmer Middle School District 8100 Wolftrap Rd. Vienna VA 22182	N/A	School	For assistance with education	
Knights of Columbus Charities Arch Street Pottsville PA 17901	N/A	501(c) (3)	Public charity	
League of Women Voters Ed Fund 1730 North St. NW Washington DC 20036	N/A	501(c) (3)	For assistance with education	
Lehigh Valley Health Network 420 S. Jackson St. Pottsville PA 17901	N/A	Hospital	For assistance with health care	1,480
Leukemia and Lymphoma Soc PO Box 4072 Pittsfield MA 01202	N/A	501(c) (3)	For assistance with leukemia researc	
<b>Total</b>			<b>▶ 3a</b>	
<b>b Approved for future payment</b>				
N/A				
<b>Total</b>			<b>▶ 3b</b>	

**Part XV Supplementary Information (continued)**

**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<i>a Paid during the year</i>				
<b>Mahanoy Area Historical Society</b> P.O. Box 127 Mahanoy City PA 17948	N/A		For assistance with education	
<b>Mahanoy City Visiting Nurses Assoc.</b> 100 E. Market Street Mahanoy City PA 17948	N/A	501(c)(3)	Public charity	
<b>Make-A-Wish Foundation</b>		501(c)(3)	Public charity	150
<b>Marlin Hose Company</b> PO Box 83 Marlin PA 17951	N/A	Municipality	For assistance with fire fighting	100
<b>Math Counts</b> 400 One Norwegian Plaza Pottsville PA 17901	N/A	501(c)(3)	For assistance with education	
<b>Meals of Hope</b> 2221 Corporation Blvd Naples FL 34109	N/A	501(c)(3)	Charitable	20
<b>Memorial Sloan Kettering</b> 1275 York Ave. New York NY 10065	N/A	Hospital	For assistance with science	
<b>Mid Penn Legal Services</b> 315 N. Centre St, Ste 201 Pottsville PA 17901	N/A	501(c)(3)	Public charity	
<b>Minersville Public Library</b> 220 S. Fourth St. Minersville PA 17954	N/A	501(c)(3)	For assistance with education	
<b>Mulick Scholarship Fund</b> PO Box 57 Hegins PA 17938	N/A	501(c)(3)	For assistance with education	
<b>Total</b>			▶ 3a	
<i>b Approved for future payment</i>				
N/A				
<b>Total</b>			▶ 3b	

**Part XV Supplementary Information** (continued)

**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a Paid during the year</b>				
Muscular Dystrophy Assoc. 5940 Hamilton Blvd. Allentown PA 18106	N/A	501(c)(3) For assistance with	research	500
Naples Botanical Gardens 4820 Bayshore Drive Naples FL 34112	N/A	501(c)(3)	Public charity	110
Naples Council on World Affairs 12290 Treeline Ave. Fort Myers FL 33913	N/A	501(c)(3) For assistance with	education	
Naples Museum of Art 5833 Pelican Bay Blvd. Naples FL 34108	N/A	501(c)(3) For assistance to	the arts	
National Aquarium of Baltimore 501 E. Pratt St. Baltimore MD 21202	N/A		For assistance with	education
National Council of World Affairs 12290 Treeline Ave. Ft. Myers FL 33913	N/A	501(c)(3)	Public charity	
National Wheelchair Basketball Asso 1130 Elkton Street Colorado Springs CO 80907	N/A	501(c)(3) For assistance to	handicapped	
Nativity BVM High School Lawton Hill Pottsville PA 17901	N/A	School For assistance with	education	100
N. Berks/S. Schuylkill Hist. Soc. Port Clinton Port Clinton PA 19549	N/A		For assistance with	education
Oheb Zedeck Sisterhood 2400 West End Ave. Pottsville PA 17901	N/A	Church For assistance with	religion	
<b>Total</b>				<b>▶ 3a</b>
<b>b Approved for future payment</b>				
N/A				
<b>Total</b>				<b>▶ 3b</b>

**Part XV Supplementary Information (continued)**

**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a Paid during the year</b>				
Oheb Zedeck Synagogue Center 2400 West End Ave. Pottsville PA 17901	N/A	Church	For assistance with religion	250
Olmsted Center for Sight 1170 Main St. Buffalo NY 14209	N/A	501(c)(3)	Public charity	
Orwigsburg Borough North Warren St. Orwigsburg PA 17961	N/A	501(c)(3)	For assistance with ambulance servic	
Orwigsburg Free Public Library 214 Independence St. Orwigsburg PA 17961	N/A	501(c)(3)	For assistance with education/books	200
Osher Lifelong Learning Institute 50 Fairwood Dr. Ste. 100 Rochester NY 14623	N/A	School	For assistance with education	100
PAHS Girls Softball Boosters 16th St. & Elk Ave. Pottsville PA 17901	N/A		For assistance with youth athletics	
Parkinson Assoc. of S.W. Florida 1048 Goodlette Rd. Naples FL 34102	N/A	501(c)(3)	For assistance with Parkinson resear	
Pennsylvania FOP Association 2949 North Front Street Harrisburg PA 17110-1250	N/A	501(c)(3)	Public charity	
Pennsylvania Heritage Foundation 400 North Street Harrisburg PA 17120	N/A	501(c)(3)	For assistance with education	
Pennsylvania State University 201 Old Main University Park PA 16802	N/A	School	For assistance with education	100
<b>Total</b>			▶ 3a	
<b>b Approved for future payment</b>				
N/A				
<b>Total</b>			▶ 3b	

**Part XV** Supplementary Information (continued)

**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a Paid during the year</b>				
People for the American Way Found 2000 M St NW Washington DC 20077	N/A	501(c)(3)	For assistance with education	
Philharmonic Ctr for Arts 5833 Pelican Bay Blvd. Naples FL 34108	N/A	501(c)(3)	For assistance with arts	
Phoenix Fire Company No. 2 P.O. Box 1245 Pottsville PA 17901	N/A		For assistance with firefighting	200
Planned Parenthood Federation of Am PO Box 97166 Washington DC 20077	N/A	501(c)(3)	For assistance with education	520
Pottsville Area Little League Assoc 556 E. Norwegian St. Pottsville PA 17901	N/A		Youth Sports For assistance with youth sports	100
Pottsville Boys Soccer Boosters 16th St. & Elk Ave. Pottsville PA 17901	N/A		Youth Sports For assistance with youth sports	40
Pottsville Chapter of Hadassah 2400 West End Avenue Pottsville PA 17901	N/A	501(c)(3)	For assistance with religion	
Pottsville Crimson Tide Wrestling Pottsville Pottsville PA 17901	N/A		Charitable	175
Pottsville Midget Football League Pottsville Pottsville PA 17901	N/A		For assistance with youth athletics	
Pottsville Mothers Football Booster P.O. Box 953 Pottsville PA 17901	N/A	501(c)(3)	For assistance with youth sports	320
<b>Total</b>			▶ 3a	
<b>b Approved for future payment</b>				
N/A				
<b>Total</b>			▶ 3b	

**Part XV Supplementary Information (continued)**

**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a Paid during the year</b>				
Pottsville Free Public Library 215 W. Market St. Pottsville PA 17901	N/A	501(c) (3)	For assistance with education/books	500
Pottsville Rotary Charities Pottsville Pottsville PA 17901	N/A	501(c) (3)	Public charity	
Pottsville Teener Baseball League 436 Adams Street Pottsville PA 17901	N/A	Youth Sports	For assistance with youth sports	
Princeton Club of SW Florida PO Box 112795 Naples FL 34108	N/A	501(c) (3)	For assistance with education	
Princeton University 1 Nassau Hall Princeton NJ 08544	N/A	School	For assistance with education	
PSP Camp Cadet c/o Riverview Bank Pottsville PA 17901	N/A	501(c) (3)	Public charity	
Reading Health System Foundation 6th Ave. & Spruce St. West Reading PA 19608	N/A	Hospital	For assistance with health care	
Reading Public Museum 500 Museum Road Reading PA 19611	N/A	501(c) (3)	For assistance with education	
Renaissance Acad of FL 8695 College Parkway Fort Myers FL 33919	N/A	School	For assistance with education	
Ride to Conquer Cancer 6024 Ridge Ave. Philadelphia PA 19128	N/A	501(c) (3)	Public charity	
<b>Total</b>				<b>▶ 3a</b>
<b>b Approved for future payment</b> N/A				
<b>Total</b>				<b>▶ 3b</b>

**Part XV Supplementary Information (continued)**

**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a Paid during the year</b>				
Ruth Steinert SPCA 18 Wertz Dr. Pine Grove PA 17963	N/A	501(c)(3) Public charity		
Salvation Army N. Centre Street Pottsville PA 17901	N/A	501(c)(3) Public charity		100
Schuylkill Alliance for Healthcare One South Second Street Pottsville PA 17901	N/A	501(c)(3)	For assistance with health care	
Schuylkill Area Community Foundatio 216 South Centre Street Pottsville PA 17901	N/A	501(c)(3) Public charity		550
Schuylkill County Council for Arts 1440 Mahantongo Street Pottsville PA 17901	N/A	501(c)(3)	For assistance with arts	
Schuylkill County Historical Societ 305 N. Centre St. Pottsville PA 17901	N/A	501(c)(3) Public charity		
Schuylkill County YMCA 219 N. 12th St. Pottsville PA 17901	N/A	501(c)(3)	To promote Christian principles	
Schuylkill EMS 320 N. 9th St. Pottsville PA 17901	N/A	501(c)(3)	Charitable	100
Schuylkill Health Care South Jackson St. Pottsville PA 17901	N/A	501(c)(3) Public charity		
Schuylkill Intermediate Unit 29 17 Maple Ave. MarLin PA 17951	N/A	School	For assistance with education	
<b>Total</b>				<b>▶ 3a</b>
<b>b Approved for future payment</b>				
N/A				
<b>Total</b>				<b>▶ 3b</b>

**Part XV Supplementary Information (continued)**

**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a Paid during the year</b>				
Schuylkill Medical Center South Jackson St. Pottsville PA 17901	N/A	Hospital	For assistance with health care	
Schuylkill United Way 9 North Centre St. Pottsville PA 17901	N/A	501(c) (3)	Public charity	850
Schuylkill Wom. in Crisis 368 S. Center St. Pottsville PA 17901	N/A	501(c) (3)	For assistance to women	100
Schuylkill YMCA North Centre Street Pottsville PA 17901	N/A	501(c) (3)	Public charity	540
Seltzer Hose Company PO Box 4270 Seltzer PA 17974	N/A	Municipality	For assistance with fire fighting	200
Sexual Assault Resource Couns Ctr 17 Westwood Centre Pottsville PA 17901	N/A	501(c) (3)	For assistance to victims	
Shelter for Abused Women & Children Lakewood Boulevard Naples FL 34112	N/A	501(c) (3)	For assistance to victims	
Shriner's Children's Hospital 3551 N. Broad St. Philadelphia PA 19140	N/A	Hospital	For assistance with health care	
Sjogren's Syndrome Foundation 6707 Democracy Boulevard Bethesda MD 20817	N/A	501(c) (3)	For assistance with education	
Sol Lipton Scholarship Foundation 316 N. Centre St. Pottsville PA 17901	N/A	501(c) (3)	For assistance with education	100
<b>Total</b>			▶ 3a	
<b>b Approved for future payment</b>				
N/A				
<b>Total</b>			▶ 3b	

**Part XV Supplementary Information** (continued)

**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a Paid during the year</b>				
Southern Poverty Law Center 400 Washington Ave. Montgomery AL 36104	N/A		For assistance with education	
Sovereign Majestic Theatre North Centre Street Pottsville PA 17901	N/A	501(c) (3)	For assistance with arts	295
Special Olympics Georgia 4000 Dekalb Parkway Atlanta GA 30340	N/A	501(c) (3)	For assistance to handicapped	
St. John the Baptist Church 10th & Mahantongo Streets Pottsville PA 17901	N/A	Church	For assistance with religion	
St. John's UCC Church 236 Market Street Orwigsburg PA 17961	N/A	Church	For assistance with religion	
St. Joseph Center 2075 W. Norwegian Street Pottsville PA 17901	N/A	501(c) (3)	For assistance with education	300
St. Jude's Children's Hospital 262 Danny Thomas Place Memphis TN 38105	N/A	Hospital	For assistance with health care	50
St. Katherine's Church Naples Naples FL 34108	N/A	Church	For assistance with religion	
St. Mark's UCC 30 Pottsville Street Cressona PA 17929	N/A	Church	For assistance with religion	
St. Nicholas Church Sunbury Street Minersville PA 17954	N/A	Church	For assistance with religion	
<b>Total</b>				<b>▶ 3a</b>
<b>b Approved for future payment</b>				
N/A				
<b>Total</b>				<b>▶ 3b</b>

**Part XV Supplementary Information** (continued)

**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a Paid during the year</b>				
St. Nicholas School Memorial Fund 515 North Front Street Minersville PA 17954	N/A	School	For assistance with education	
St. Patrick's Church 319 Mahantongo St. Pottsville PA 17901	N/A	Church	For assistance with religion	
St. Richard's Church Barnesville Barnesville PA 18214	N/A	Church	For assistance with religion	
Susan G. Korman for Cure 5005 LBJ Freeway Dallas TX 75244	N/A	501(c)(3)	Assistance with medical research	
Temple University Hootathon North Broad Street Philadelphia PA 19122	N/A	School	For assistance with education	
The Community Mission 336 N. Front Street Minersville PA 17954	N/A	501(c)(3)	Charitable	750
The Hill School 717 E. High St. Pottstown PA 19464	N/A	School	For assistance with education	
The Main Idea at Camp Walden 93 Walden Dr. Denmark ME 04022	N/A	501(c)(3)	For assistance with education	
The Taussig Cancer Ins at Cleveland 9500 Euclid Cleveland OH 44195	N/A	501(c)(3)	For assistance with education	
Trinity Lutheran Church 300 W. Arch St. Pottsville PA 17901	N/A	Church	For assistance with religion	
<b>Total</b>				▶ 3a
<b>b Approved for future payment</b>				
N/A				
<b>Total</b>				▶ 3b

**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> <b>Trustees of Phillips Academy</b> P.O. Box 55557 Boston MA 02205	N/A	School	For assistance with education	
<b>Trustees of Univ of Pennsylvania</b> 3910 Chestnut Street Philadelphia PA 19194	N/A	School	For assistance with education	
<b>Tryall Fund</b> 641 Lexington Ave. New York NY 10022	N/A	501(c)(3)	For assistance in education	
<b>University of Pennsylvania</b> Philadelphia Philadelphia PA 19104	N/A	School	For assistance with education	150
<b>University of Pittsburgh</b> 4200 Fifth Avenue Pittsburgh PA 15260	N/A	School	For assistance with education	
<b>Upper Schuylkill High School</b> 4210 Hollywood Boulevard Hazle Twp PA 18202	N/A	School	For assistance with education	
<b>Walk In Art Center</b> 100 S. Columbia Ave. Schuylkill Haven PA 17972	N/A	501(c)(3)	For assistance with arts	
<b>Westbriar PTA</b> 1741 Pine Valley Drive Vienna VA 22182	N/A		For assistance with education	
<b>WGPU Public Television</b> 10501 FGCU Blvd. South Ft. Myers FL 33965		N/A	For assistance with education	
<b>Women in Sports</b> 244 5th Ave. New York NY 10001	N/A	501(c)(3)	Public charity	
<b>Total</b>			▶ 3a	
b <i>Approved for future payment</i> N/A				
<b>Total</b>			▶ 3b	

**Part XV** Supplementary Information *(continued)*

**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i> <b>WVIA TV Public Broadcasting</b> <b>100 WVIA Way</b> <b>Pittston PA 18640</b>	N/A		For assistance with education	100
<b>Yorkville Hose Fire Company</b> <b>20th &amp; West Norwegian Sts</b> <b>Pottsville PA 17901</b>	N/A		For assistance with fire fighting	
<b>Total</b>				▶ <b>3a</b>
<b>b</b> <i>Approved for future payment</i> <b>N/A</b>				
<b>Total</b>				▶ <b>3b</b>





**Federal Statements**

**Statement 1 - Form 990-PF, Part I, Line 11 - Other Income**

Description	Revenue per Books	Net Investment Income	Adjusted Net Income
MISCELLANEOUS INCOME	\$ 13	\$ 0	\$ 13
Total	\$ 13	\$ 0	\$ 13

**Statement 2 - Form 990-PF, Part I, Line 16b - Accounting Fees**

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
MARSHALL, BOHORAD, THORNBERG, PRICE	\$ 730	\$ 0	\$ 0	\$ 0
Total	\$ 730	\$ 0	\$ 0	\$ 0

**Statement 3 - Form 990-PF, Part I, Line 16c - Other Professional Fees**

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
MID PENN BANK - INVESTMENT FEES	\$ 1,239	\$ 0	\$ 0	\$ 0
Total	\$ 1,239	\$ 0	\$ 0	\$ 0

**Statement 4 - Form 990-PF, Part I, Line 18 - Taxes**

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
2017 FEDERAL EXCISE TAX	\$ 1,293	\$ 0	\$ 0	\$ 0
FOREIGN INCOME TAX WITHHELD	79	\$ 0	\$ 0	\$ 0
Total	\$ 1,372	\$ 0	\$ 0	\$ 0

**Federal Statements**

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FYE: 12/31/2018

**Statement 5 - Form 990-PF, Part I, Line 23 - Other Expenses**

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Expenses				
BANK SERVICE CHARGES	48			
OFFICE SUPPLIES - CHECKS				
<b>Total</b>	<b>48</b>	<b>0</b>	<b>0</b>	<b>0</b>

**Statement 6 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments**

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
WADDELL & REED WR ADVISOR FUNDS:				
SCIENCE AND TECHNOLOGY BOND	8,294		Cost	
GOVERNMENT SECURITIES	137	137	Cost	
SMALL CAP	100	100	Cost	
WILSHIRE GLOBAL ALLOCATION A	10,988	13,772	Cost	12,802
IVY INTERNATIONAL CORE EQUITY	8,908	7,751	Cost	6,512
IVY CORE EQUITY A	4,931	5,446	Cost	5,606
IVY SCIENCE AND TECHNOLOGY A	48,095	52,867	Cost	43,677
IVY BALANCED A		10,314	Cost	11,918
ADVISORS HIGH INCOME A	49,582	11,969	Cost	10,394
ADVISORS CONTINENTAL INCOME A	10,839	50,614	Cost	43,874
MID PENN BANK TRUST DEPT.			Cost	
FEDERATED FLOATING RATE STRAT INC	15,000		Cost	
FEDERATED STRATEGIC VALUE FD		5,000	Cost	4,454
FEDERATED TOTAL RETURN BOND FD IS	15,000	15,000	Cost	14,332
ISHARES CORE MSCI EMERGING MKTS		6,022	Cost	4,715
PRINCIPAL PREFERRED SEC INST		3,500	Cost	3,360
SPDR FINANCIAL SELECT SECTOR		5,438	Cost	4,764
T. ROWE PRICE DIVIDEND GROWTH		6,500	Cost	5,833
T. ROWE PRICE MID CAP GROWTH	5,000	5,000	Cost	4,369
VANGUARD EMERGING MKTS STOCK INDEX	16,000	8,523	Cost	7,257
VANGUARD HIGH DIVIDEND YIELD INDEX	5,000	10,000	Cost	8,967
VANGUARD MID-CAP VALUE IND ADM		3,000	Cost	2,494

**Federal Statements**

\*\*-\*\*\*5617

FYE: 12/31/2018

**Statement 6 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments (continued)**

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
VANGUARD SHORT-TERM CORP BD IDX AD	\$ 15,000	\$ 15,000	Cost	\$ 14,621
VANGUARD SMALL-CAP VALUE INDEX FD	5,000	5,000	Cost	4,265
VANGUARD STAR FUND	8,000	8,000	Cost	6,896
VANGUARD TOTAL INTL STOCK INDEX FD	11,000	11,000	Cost	9,239
VANGUARD TOTAL STOCK MKT IND FD		5,000	Cost	4,448
<b>Total</b>	<b>\$ 236,874</b>	<b>\$ 264,953</b>		<b>\$ 234,797</b>

**Federal Statements**

**Statement 7 - Form 990-PF, Part XV, Line 2b - Application Format and Required Contents**

Description

LETTER FORM, TO INCLUDE THE PURPOSE FOR WHICH THE FUNDS  
WILL BE USED

**Form 990-PF, Part XV, Line 2c - Submission Deadlines**

Description

NONE

**Form 990-PF, Part XV, Line 2d - Award Restrictions or Limitations**

Description

NONE

**Underdistribution and Excess Distributions for Part XIII**

Form **990-PF**

**2018**

For calendar year 2018, or tax year beginning \_\_\_\_\_, ending \_\_\_\_\_

Name <b>BEN D. SPAGOLIO CHARITABLE TRUST</b> <b>C/O JAMES C. BOHORAD, TRUSTEE</b>	Employer Identification Number <b>**-***5617</b>
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**Undistributed Income Carryovers**

Form 990-PF, Part XIII

Tax Year	Prior Undistributed Income			Current Year Decreases	Next Year Carryover	
	Nontaxable or Previously Taxed	Taxable in 2018	Total per Year		Nontaxable or Previously Taxed	Taxable in 2019
Years prior						
20 <b>14</b>						
20 <b>15</b>						
20 <b>16</b>						
2017		12,112	12,112	12,112		
2018			13,995	243		13,752
<b>Total Carryover to Next Year</b>						<b>13,752</b>

\* Carryover amount includes 4942(a) amounts

**Excess Distribution Carryovers**

Form 990-PF, Part XIII

Preceding Tax Year Excess Distributions	Current Year	Next Year
	Decreases	Carryover
2013		
2014		
2015		
2016		
2017		
<b>Current Year Excess Distribution Generated (2018)</b>		<b>0</b>
<b>Total Carryover to Next Year</b>		<b>0</b>