

Form **990-PF**
 Department of the Treasury
 Internal Revenue Service

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

▶ **Do not enter social security numbers on this form as it may be made public.**
 ▶ **Go to www.irs.gov/Form990PF for instructions and the latest information.**

OMB No 1545-0052
2018
Open to Public Inspection

For calendar year 2018, or tax year beginning 01-01-2018 , and ending 12-31-2018

Name of foundation THE SOOCH FOUNDATION		A Employer identification number 20-0399480	
Number and street (or P O box number if mail is not delivered to street address) 600 WEST 7TH STREET	Room/suite	B Telephone number (see instructions) (512) 472-5755	
City or town, state or province, country, and ZIP or foreign postal code AUSTIN, TX 78701		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ <u>13,828,754</u>		J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ <i>(Part I, column (d) must be on cash basis)</i>	
		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	

	Part I Analysis of Revenue and Expenses <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</i>	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	270,746	270,746		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	208,040			
	b Gross sales price for all assets on line 6a	1,646,521			
	7 Capital gain net income (from Part IV, line 2)		208,040		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule)	133,387	133,387			
12 Total. Add lines 1 through 11	612,173	612,173			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages	57,725	0		57,725
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	5,336	2,668		2,668
	c Other professional fees (attach schedule)	66,545	30,545		36,000
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	48,083	6,493		4,590
	19 Depreciation (attach schedule) and depletion	246	0		
	20 Occupancy				
	21 Travel, conferences, and meetings	5,000	0		5,000
	22 Printing and publications				
	23 Other expenses (attach schedule)	52,975	22,218		30,757
	24 Total operating and administrative expenses. Add lines 13 through 23	235,910	61,924		136,740
	25 Contributions, gifts, grants paid	415,000			415,000
26 Total expenses and disbursements. Add lines 24 and 25	650,910	61,924		551,740	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	-38,737				
b Net investment income (if negative, enter -0-)		550,249			
c Adjusted net income (if negative, enter -0-)					

Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing	690,719	502,122	502,122
	2 Savings and temporary cash investments			
	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 (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments—U S and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)	9,298,939	5,775,946	5,775,946
	c Investments—corporate bonds (attach schedule)	4,008,063	5,837,336	5,837,336
	11 Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	1,696,493	1,713,135	1,713,135
	14 Land, buildings, and equipment basis ▶ _____ 15,670 Less accumulated depreciation (attach schedule) ▶ _____ 15,455	461	215	215
15 Other assets (describe ▶ _____)				
16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	15,694,675	13,828,754	13,828,754	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶ _____)			
	23 Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	0	0	
	28 Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
29 Retained earnings, accumulated income, endowment, or other funds	15,694,675	13,828,754		
30 Total net assets or fund balances (see instructions)	15,694,675	13,828,754		
31 Total liabilities and net assets/fund balances (see instructions) .	15,694,675	13,828,754		

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	15,694,675
2 Enter amount from Part I, line 27a		2	-38,737
3 Other increases not included in line 2 (itemize) ▶ _____		3	7,853
4 Add lines 1, 2, and 3		4	15,663,791
5 Decreases not included in line 2 (itemize) ▶ _____		5	1,835,037
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .		6	13,828,754

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs. MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a See Additional Data Table			
b			
c			
d			
e			

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a See Additional Data Table			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	2	208,040
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? Yes No
 If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year, see instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2017	463,017	14,394,185	0.032167
2016	444,818	13,438,697	0.033100
2015	802,266	14,314,012	0.056048
2014	735,840	14,805,115	0.049702
2013	714,541	14,242,139	0.050171

2 Total of line 1, column (d)	2	0.221188
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years	3	0.044238
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	14,763,692
5 Multiply line 4 by line 3	5	653,116
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	5,502
7 Add lines 5 and 6	7	658,618
8 Enter qualifying distributions from Part XII, line 4	8	551,740

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

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

Table with 11 rows for excise tax calculations. Includes categories like 'Exempt operating foundations', 'Domestic foundations', and 'Tax based on investment income'. Total amount owed is 11,473.

Part VII-A Statements Regarding Activities

Table with 10 rows for activity statements. Questions include 'Did the foundation attempt to influence any national, state, or local legislation?', 'Did it spend more than \$100 for political purposes?', and 'Did the foundation have at least \$5,000 in assets?'. Includes a section for states reported to.

Part VII-A Statements Regarding Activities (continued)

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

Located at 600 WEST 7TH STREET AUSTIN TX ZIP+4 78701

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here and enter the amount of tax-exempt interest received or accrued during the year.

Table with 3 columns: Question, Yes, No. Row 16 regarding interest in or authority over a bank, securities, or other financial account in a foreign country.

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

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

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

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

5a During the year did the foundation pay or incur any amount to				Yes	No
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No			
(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No			
(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No			
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions.	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No			
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No			
b If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions.			5b		
Organizations relying on a current notice regarding disaster assistance check here.	<input type="checkbox"/>				
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? <i>If "Yes," attach the statement required by Regulations section 53.4945–5(d)</i>	<input type="checkbox"/> Yes	<input type="checkbox"/> No			
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No			
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <i>If "Yes" to 6b, file Form 8870</i>			6b		No
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No			
b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?			7b		
8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment 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, 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
NAVDEEP S SOOCH 600 W 7TH STREET AUSTIN, TX 78701	PRESIDENT & TREASURER 5 00	0	0	0
DAVID R WELLAND 600 W 7TH STREET AUSTIN, TX 78701	VICE PRESIDENT 1 00	0	0	0
ISABEL WELLAND 600 W 7TH STREET AUSTIN, TX 78701	SECRETARY & TRUSTEE 1 00	0	0	0
JOHN MCGOVERN 600 W 7TH STREET AUSTIN, TX 78701	TRUSTEE 1 00	0	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
MARY ELLEN PIETRUSZYNSKI 600 WEST 7TH STREET AUSTIN, TX 78701	EXECUTIVE DIRECTOR 30 00	57,725	2,275	0

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. ▶		0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3 ▶	0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities.	1a	14,734,216
b	Average of monthly cash balances.	1b	254,304
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	14,988,520
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	14,988,520
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	224,828
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	14,763,692
6	Minimum investment return. Enter 5% of line 5.	6	738,185

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

1	Minimum investment return from Part X, line 6.	1	738,185
2a	Tax on investment income for 2018 from Part VI, line 5.	2a	11,005
b	Income tax for 2018 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	11,005
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	727,180
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	727,180
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	727,180

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26.	1a	551,740
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	4	551,740
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions.	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	551,740

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
1 Distributable amount for 2018 from Part XI, line 7				727,180
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only.			0	
b Total for prior years 20___, 20___, 20___		0		
3 Excess distributions carryover, if any, to 2018				
a From 2013.				
b From 2014.				
c From 2015.				18,043
d From 2016.				
e From 2017.				
f Total of lines 3a through e.	18,043			
4 Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ 551,740				
a Applied to 2017, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2018 distributable amount.				551,740
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a))	18,043			18,043
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
b Prior years' undistributed income Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2017 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2018 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2019				157,397
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2013 not applied on line 5 or line 7 (see instructions).	0			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	0			
10 Analysis of line 9				
a Excess from 2014.				
b Excess from 2015.				
c Excess from 2016.				
d Excess from 2017.				
e 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 organization 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	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c "Support" alternative test—enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the 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))
See Additional Data Table

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds If the foundation makes gifts, grants, etc 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

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

c Any submission deadlines

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

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

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

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

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)
1 STCG FROM K-1 VIDA LONGEVITY FUND LP	P		
1 10,000 UNITS AMERICAN INTL GROUP INC	P	2008-04-30	2018-01-16
25,000 UNITS AT&T INC 5 50%	P	2008-01-31	2018-02-01
985 22 UNITS BBH LIMITED DURATION I	P	2018-01-17	2018-07-02
2,460 63 UNITS BBH LIMITED DURATION I	P	2018-01-17	2018-06-01
10,000 UNITS BURLINGTON NORTHERN SANTA FE CORP NT 5 75%	P	2008-04-10	2018-03-15
2,060 16 UNITS DFA EMERGING MARKETS CORE EQUITY	P	2016-07-25	2018-02-02
3,926 70 UNITS DFA INTL CORE EQUITY	P	2016-07-25	2018-01-17
3,333 33 UNITS DFA INTL CORE EQUITY	P	2016-07-25	2018-02-02
2,933 78 UNITS DFA US CORE EQUITY 1	P	2016-07-25	2018-01-17

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
			280
10,000		10,000	0
25,000		25,000	0
9,985		10,040	-55
24,985		25,077	-92
10,000		10,000	0
49,985		36,713	13,272
59,985		44,255	15,730
49,985		37,567	12,418
69,985		53,600	16,385

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			280
			0
			0
			-55
			-92
			0
			13,272
			15,730
			12,418
			16,385

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

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)
4,096 59 UNITS DFA US CORE EQUITY 1	P	2016-07-25	2018-01-04
1 2,560 82 UNITS DFA US CORE EQUITY 1	P	2016-07-25	2018-02-02
5,048 67 UNITS DFA US CORE EQUITY 1	P	2017-02-03	2018-06-01
3,115 91 UNITS DFA US CORE EQUITY 1	P	2017-02-03	2018-07-17
1,923 08 UNITS DFA US CORE EQUITY 1	P	2017-02-03	2018-07-02
261 44 UNITS DFA US CORE EQUITY 1	P	2017-02-21	2018-06-01
10,000 UNITS GLAXOSMITHKLINE CAP INC NT 5 65%	P	2008-05-19	2018-05-15
10,000 UNITS MIDAMERICAN ENERGY HOLDINGS NEW SR GLOBAL NT 5 75%	P	2008-08-28	2018-04-01
200,000 UNITS US TREASURY NOTE 0 75% 2/28/18	P	2016-07-26	2018-02-28
200,000 UNITS US TREASURY NOTE 1 375%	P	2018-03-05	2018-09-30

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
94,985		74,845	20,140
59,985		46,786	13,199
118,831		99,920	18,911
74,985		61,669	13,316
44,985		38,061	6,924
6,154		5,326	828
10,000		10,000	0
10,000		10,000	0
200,000		200,000	0
200,000		200,000	0

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			20,140
			13,199
			18,911
			13,316
			6,924
			828
			0
			0
			0
			0

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

List and describe the kind(s) of property sold (e.g., real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
200,000 UNITS US TREASURY NOTE 1 50%	P	2017-11-17	2018-12-31
1 200,000 UNITS US TREASURY NOTE 144A 0 875%	P	2017-01-25	2018-07-15
174 25 UNITS VANGUARD REIT INDEX ADMIRAL	P	2018-01-04	2018-07-02
1,919 39 UNITS VANGUARD TOTAL BOND MARKET INDEX ADMIRAL	P	2017-11-20	2018-07-02
CAPITAL GAINS DIVIDENDS	P		

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
200,000		199,710	290
200,000		199,544	456
19,985		20,009	-24
19,985		20,639	-654
76,716			76,716

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
			290
			456
			-24
			-654
			76,716

Form 990PF Part XV Line 1a - 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).

NAVDEEP S SOOCH

DAVID R WELLAND

ISABEL WELLAND

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ASSISTANCE LEAGUE OF AUSTIN TEXAS INC 4901 BURNET RD AUSTIN, TX 78756	N/A	PC	TO SUPPORT ORGANIZATION'S PURPOSE	50,000
AUSTIN COMMUNITY COLLEGE 5930 MIDDLE FISKVILLE ROAD AUSTIN, TX 78752	N/A	PC	TO SUPPORT ORGANIZATION'S PURPOSE	25,000
AUSTIN COMMUNITY FOUNDATION 4315 GUADALUPE SUITE 300 AUSTIN, TX 78751	N/A	PC	TO SUPPORT ORGANIZATION'S PURPOSE	5,000
Total				415,000

▶ **3a**

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CARITAS OF AUSTIN PO BOX 1947 AUSTIN, TX 78767	N/A	PC	TO SUPPORT ORGANIZATION'S PURPOSE	25,000
E4 YOUTH 4302 AIRPORT BLVD AUSTIN, TX 78722	N/A	PC	TO SUPPORT ORGANIZATION'S PURPOSE	10,000
ECONOMIC GROWTH BUSINESS INCUBATOR 1144 AIRPORT BLVD SUITE 260 AUSTIN, TX 78702	N/A	PC	TO SUPPORT ORGANIZATION'S PURPOSE	10,000
Total				415,000

▶ 3a

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
FOUNDATION COMMUNITIES INC 3036 S 1ST ST AUSTIN, TX 78704	N/A	PC	TO SUPPORT ORGANIZATION'S PURPOSE	25,000
JEREMIAH PROGRAM 1200 PAUL TERESA SALDANA ST AUSTIN, TX 78702	N/A	PC	TO SUPPORT ORGANIZATION'S PURPOSE	25,000
KIPP AUSTIN PUBLIC SCHOOLS INC 135 MAIN STREET SUITE 1700 SAN FRANCISCO, CA 94105	N/A	PC	TO SUPPORT ORGANIZATION'S PURPOSE	35,000
Total ▶ 3a				415,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
PELOTONU 500 E ST JOHNS AVE STE 1460 AUSTIN, TX 78752	N/A	PC	TO SUPPORT ORGANIZATION'S PURPOSE	25,000
SAN JUAN DIEGO CATHOLIC HIGH SCHOOL 800 HERNDON LANE AUSTIN, TX 78704	N/A	PC	TO SUPPORT ORGANIZATION'S PURPOSE	20,000
SKILLPOINT ALLIANCE 201 E 2ND ST STE B AUSTIN, TX 78701	N/A	PC	TO SUPPORT ORGANIZATION'S PURPOSE	100,000
Total ▶ 3a				415,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ST EDWARDS UNIVERSITY 3001 SOUTH CONGRESS AVENUE AUSTIN, TX 78704	N/A	PC	TO SUPPORT ORGANIZATION'S PURPOSE	5,000
TEXAS EMPOWERMENT ACADEMY 3613 BLUESTEIN DRIVE AUSTIN, TX 78721	N/A	PC	TO SUPPORT ORGANIZATION'S PURPOSE	5,000
TODOS JUNTOS4229 200 BRUSHY ST AUSTIN, TX 78702	N/A	PC	TO SUPPORT ORGANIZATION'S PURPOSE	25,000
Total				415,000

▶ 3a

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
YOUTH AND FAMILY ALLIANCE (AKA LIFEWORCS) 3700 SOUTH 1ST ST AUSTIN, TX 78704	N/A	PC	TO SUPPORT ORGANIZATION'S PURPOSE	25,000
Total ▶ 3a				415,000

TY 2018 Accounting Fees Schedule**Name:** THE SOOCH FOUNDATION**EIN:** 20-0399480

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	5,336	2,668		2,668

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2018 Depreciation Schedule

Name: THE SOOCH FOUNDATION

EIN: 20-0399480

Depreciation Schedule

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
APPLE LAPTOPS	2014-11-13	2,698	888	200DB	5 000000000000	246	0		

TY 2018 Investments Corporate Bonds Schedule**Name:** THE SOOCH FOUNDATION**EIN:** 20-0399480**Investments Corporate Bonds Schedule**

Name of Bond	End of Year Book Value	End of Year Fair Market Value
FIXED INCOME FUNDS	5,837,336	5,837,336

TY 2018 Investments Corporate Stock Schedule**Name:** THE SOOCH FOUNDATION**EIN:** 20-0399480

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
EQUITY FUNDS	5,775,946	5,775,946

TY 2018 Investments - Other Schedule**Name:** THE SOOCH FOUNDATION**EIN:** 20-0399480**Investments Other Schedule 2**

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
CAIS MILLENNIUM INT'L LTD	FMV	753,663	753,663
VIDA LONGEVITY FUND LP	FMV	959,472	959,472

**TY 2018 Land, Etc.
Schedule****Name:** THE SOOCH FOUNDATION**EIN:** 20-0399480

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
ORGANIZATION COSTS	12,972	12,972	0	
APPLE LAPTOPS	2,698	2,483	215	

TY 2018 Other Decreases Schedule**Name:** THE SOOCH FOUNDATION**EIN:** 20-0399480

Description	Amount
UNREALIZED LOSS	1,799,426
BOOK/TAX DIFFERENCE FROM VIDA K-1	35,611

TY 2018 Other Expenses Schedule**Name:** THE SOOCH FOUNDATION**EIN:** 20-0399480**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TELEPHONE	1,200	0		1,200
PAYROLL SERVICE FEES	703	0		703
INVESTMENT EXPENSES - FROM K-1 VIDA LONGEVITY FUND, LP	22,218	22,218		0
HEALTH INSURANCE	24,583	0		24,583
MISCELLANEOUS EXPENSE	4,271	0		4,271

TY 2018 Other Income Schedule**Name:** THE SOOCH FOUNDATION**EIN:** 20-0399480**Other Income Schedule**

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
OTHER INCOME - FROM K-1 VIDA LONGEVITY FUND, LP	106,913	106,913	106,913
SETTLEMENT INCOME FROM MADOFF VICTIM FUND	25,762	25,762	25,762
SETTLEMENT INCOME FROM INSIGNIA LEGACY OFFSHORE OPERATING MERITAGE CAPITAL	474	474	474
SETTLEMENT INCOME FROM FEF SETTLEMENT FUND	238	238	238

TY 2018 Other Increases Schedule**Name:** THE SOOCH FOUNDATION**EIN:** 20-0399480

Description	Amount
NON-DIVIDEND DISTRIBUTIONS	7,853

TY 2018 Other Professional Fees Schedule**Name:** THE SOOCH FOUNDATION**EIN:** 20-0399480

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT	30,545	30,545		0
CONSULTING	36,000	0		36,000

TY 2018 Taxes Schedule**Name:** THE SOOCH FOUNDATION**EIN:** 20-0399480

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAX	6,493	6,493		0
PAYROLL TAXES	4,590	0		4,590
EXCISE TAX	37,000	0		0