

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

Name of foundation THE OXFORD AREA FOUNDATION		A Employer identification number 20-1060782	
Number and street (or P O box number if mail is not delivered to street address) PO BOX 341		Room/suite	B Telephone number (see instructions) (610) 932-4627
City or town, state or province, country, and ZIP or foreign postal code OXFORD, PA 19363		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 13,790,319	J Accounting method ☐ Cash ☐ Accrual ☒ Other (specify) <u>Modified Cash</u> (Part I, column (d) must be on cash basis)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	28,140			
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	20,741	16,273		
	4 Dividends and interest from securities . . .	277,284	276,039		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	366,900			
	b Gross sales price for all assets on line 6a 1,991,323				
	7 Capital gain net income (from Part IV, line 2) . . .		366,809		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	 10,386	14,718		
	12 Total. Add lines 1 through 11	703,451	673,839		
	13 Compensation of officers, directors, trustees, etc	17,500	3,500		14,000
	14 Other employee salaries and wages	43,184	2,159		41,025
	15 Pension plans, employee benefits	10,908	1,017		9,891
	16a Legal fees (attach schedule)	 20,648	15,486		5,162
	b Accounting fees (attach schedule)	 12,150	9,113		3,038
	c Other professional fees (attach schedule)	 149,447	147,269		2,178
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	 51,320	941		0
	19 Depreciation (attach schedule) and depletion . . .	719	144		
	20 Occupancy	12,063	3,619		8,444
	21 Travel, conferences, and meetings	803	161		642
	22 Printing and publications				
	23 Other expenses (attach schedule)	 9,336	1,867		7,469
	24 Total operating and administrative expenses. Add lines 13 through 23	328,078	185,276		91,849
	25 Contributions, gifts, grants paid	389,519			389,519
	26 Total expenses and disbursements. Add lines 24 and 25	717,597	185,276		481,368
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-14,146			
	b Net investment income (if negative, enter -0-)		488,563		
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	200	200	200
	2 Savings and temporary cash investments	655,599	310,002	310,002
	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)	7,709,678	7,900,966	7,889,706
	c Investments—corporate bonds (attach schedule)	2,689,684	2,690,617	2,498,882
	11 Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	2,495,000	2,648,000	3,088,665
	14 Land, buildings, and equipment basis ▶ _____ 27,392 Less accumulated depreciation (attach schedule) ▶ 24,528	3,583	2,864	2,864
15 Other assets (describe ▶ _____)				
16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	13,553,744	13,552,649	13,790,319	
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 ☒ and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted	13,553,744	13,552,649	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ☐ and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg , and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 Total net assets or fund balances (see instructions)	13,553,744	13,552,649	
31 Total liabilities and net assets/fund balances (see instructions) .	13,553,744	13,552,649		

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	13,553,744
2 Enter amount from Part I, line 27a	2	-14,146
3 Other increases not included in line 2 (itemize) ▶ _____	3	26,501
4 Add lines 1, 2, and 3	4	13,566,099
5 Decreases not included in line 2 (itemize) ▶ _____	5	13,450
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	13,552,649

Part IV Capital Gains and Losses for Tax on Investment Income

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

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

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

2 Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	366,809
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	563,305	20,186,905	0 027904
2016	726,828	19,957,196	0 036419
2015	1,047,402	20,680,217	0 050648
2014	921,273	21,280,721	0 043291
2013	938,301	20,596,954	0 045555

2 Total of line 1, column (d)	2	0 203817
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 040763
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	14,828,612
5 Multiply line 4 by line 3	5	604,459
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	4,886
7 Add lines 5 and 6	7	609,345
8 Enter qualifying distributions from Part XII, line 4	8	481,368

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b	1	9,771
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	9,771
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	9,771
6	Credits/Payments		
a	2018 estimated tax payments and 2017 overpayment credited to 2018	6a	20,000
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	0
d	Backup withholding erroneously withheld	6d	0
7	Total credits and payments. Add lines 6a through 6d.	7	20,000
8	Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached	8	2
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	10,227
11	Enter the amount of line 10 to be Credited to 2019 estimated tax ☐ 10,227 Refunded ☐	11	0

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition). If the answer is "Yes" to 1a or 1b , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities	1b	No
c Did the foundation file Form 1120-POL for this year?	1c	No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ☐ \$ 0 (2) On foundation managers ☐ \$ 0		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$ 0		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities	2	No
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3	No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	No
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T	5	No
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ PA, DE		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .	8b	Yes
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2018 or the taxable year beginning in 2018? See the instructions for Part XIV. If "Yes," complete Part XIV	9	No
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10	Yes

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions.	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address WWW. OXFORDAREAF FOUNDATION. ORG	13	Yes	
14	The books are in care of PHILIP SAPPBRIGHAM FARIA CO-TREAS Telephone no (610) 932-4627			

Located at **59 SOUTH 3RD STREET SUITE 4 OXFORD PA** ZIP+4 **19363**

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here ☐ and enter the amount of tax-exempt interest received or accrued during the year 15			
16	At any time during calendar year 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 ▶	16	Yes	No

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

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

1a	During the year did the foundation (either directly or indirectly)		Yes	No
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☒ Yes ☐ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions. Organizations relying on a current notice regarding disaster assistance check here. ☐	1b		No
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2018?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2018? ☐ Yes ☒ No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 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).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2018?	4b		No

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

5a	During the year did the foundation pay or incur any amount to		Yes	No
(1)	Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes ☒ No		
(2)	Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	☐ Yes ☒ No		
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes ☒ No		
(4)	Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions.	☐ Yes ☒ No		
(5)	Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes ☒ No		
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions.		5b	
	Organizations relying on a current notice regarding disaster assistance check here.	☐		
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? If "Yes," attach the statement required by Regulations section 53.4945–5(d)	☐ Yes ☐ No		
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes ☒ No	6b	No
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes ☒ No	7b	
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?			
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?	☐ Yes ☒ 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
See Additional Data Table				
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(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
GLENMEDE	INVESTMENT FEES	63,135
1650 MARKET STREET SUITE 1200 PHILADELPHIA, PA 19103		
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	14,431,201
b	Average of monthly cash balances.	1b	620,003
c	Fair market value of all other assets (see instructions).	1c	3,224
d	Total (add lines 1a, b, and c).	1d	15,054,428
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	15,054,428
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	225,816
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	14,828,612
6	Minimum investment return. Enter 5% of line 5.	6	741,431

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	741,431
2a	Tax on investment income for 2018 from Part VI, line 5.	2a	9,771
b	Income tax for 2018 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	9,771
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	731,660
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	731,660
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	731,660

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	481,368
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	481,368
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	481,368

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				731,660
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only.			373,213	
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.				
d From 2016.				
e From 2017.				
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ 481,368				
a Applied to 2017, but not more than line 2a			373,213	
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.				108,155
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))	0			0
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				623,505
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))

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 e-mail address of the person to whom applications should be addressed

THE OXFORD AREA FOUNDATION - NANCY
PO BOX 341
OXFORD, PA 19363
(610) 932-4627

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

GRANT APPLICATION OUTLINE IS POST ON THE FOUNDATION'S WEBSITE. PROPOSALS SHOULD INCLUDE THE FOLLOWING: (1) GRANT APPLICATION COVER SHEET WHICH PROVIDES A BRIEF SUMMARY OF YOUR GRANT REQUEST, ANTICIPATED RESULTS AND FUNDING AMOUNT REQUESTED; (2) GRANT PROPOSAL NARRATIVE SHOULD INCLUDE (A) BACKGROUND INFORMATION - BRIEF DESCRIPTION OF AGENCY, ITS HISTORY AND MISSION STATEMENT, CURRENT PROGRAMS AND SERVICES OFFERED, AGENCY'S TARGET POPULATION, GEOGRAPHIC COMMUNITIES SERVED, AGENCY'S STRENGTHS AND ACCOMPLISHMENTS, LIST OF STAFF AND THEIR QUALIFICATIONS; (B) PURPOSE OF GRANT - TYPE OF GRANT AND AMOUNT REQUEST, EXPLAIN NEED FOR FUNDING, HIGHLIGHTED GOALS AND OBJECTIVES, ANTICIPATED OUTCOMES AND MEASUREMENTS; (C) FINANCIAL INFORMATION - DOLLAR AMOUNT REQUESTED AND TOTAL COST OF PROJECT, CURRENT AGENCY ANNUAL OPERATING BUDGET, DESCRIPTION OF HOW FUNDS WILL BE ADMINISTERED, AND (4) SUPPORT MATERIALS OF ORGANIZATION.

c Any submission deadlines

TWO GRANTS CYCLES, SUBMIT BY 3/1 FOR 5/1 GRANT PAYMENTS OR SUBMIT BY 9/1 FOR 11/1 GRANT PAYMENTS

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

ONLY ONE GRANT REQUEST PER YEAR SHOULD BE SUBMITTED FOR ANY GIVEN PROJECT. WHEN APPROPRIATE, THE FOUNDATION WILL REQUEST A MEETING OR SITE VISIT TO COMPLETE THE DECISION-MAKING PROCESS FOR FUNDING. GRANT RECIPIENTS MUST ACCEPT THE TERMS OF OUR DONATION AS SPECIFIED IN OUR GRANT CONTRACT AND THEN FOLLOW THE FOUNDATION GUIDELINES FOR GRANT REPORTING.

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	

Enter gross amounts unless otherwise indicated

[illegible]

Part XVII

	Yes	No
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1a(1)	No
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1a(2)	No
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1b(1)	No
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1b(2)	No
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1b(3)	No
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1b(4)	No
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1b(5)	No
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1b(6)		No
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1c		No
-----------	--	-----------

value
ue

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations

described in section 501(c) (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Sign Here

2019-11-13

May the IRS discuss this return with the preparer shown

Signature of officer or trustee _____ Date _____ Title _____

May the IRS discuss this return with the preparer shown below

(see instr)? ☒ Yes ☐ No

Paid Preparer Use Only	Print/Type preparer's name DOUGLAS L BERMAN CPA	Preparer's Signature	Date 2019-11-13	Check if self-employed ☐	PTIN P01269555
	Firm's name ▶ RKL LLP				Firm's EIN ▶ 23-2108173
	Firm's address ▶ 3501 CONCORD ROAD PO BOX 21439 YORK, PA 17402				Phone no (717) 843-3804

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)
1 GLENMEDE PRIVATE INVESTMENT IX, LLC(PASS-THROUGH)	P		
1 GLENMEDE PRIVATE INVESTMENT IX, LLC(PASS-THROUGH)	P		
GLENMEDE PRIVATE INVESTMENT VIII (PASS-THROUGH)	P		
GLENMEDE PRIVATE INVESTMENT VIII (PASS-THROUGH)	P		
PUBLICLY TRADED SECURITIES			
GLENMEDE PRIVATE INVESTMENT IX, LLC(PASS-THROUGH)	P		
GLENMEDE PRIVATE INVESTMENT IX, LLC(PASS-THROUGH)	P		
GLENMEDE PRIVATE INVESTMENT VIII (PASS-THROUGH)	P		
GLENMEDE PRIVATE INVESTMENT VIII (PASS-THROUGH)	P		
INDEPENDENCE GLOBAL FUND, LLC (PASS-THROUGH)	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)
1,352		1,352	0
1,067			1,067
			0
347			347
1,799,632		1,623,162	176,470
			0
199			199
			0
18,137			18,137
			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			(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			0
			1,067
			0
			347
			176,470
			0
			199
			0
			18,137
			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)
INDEPENDENCE GLOBAL FUND, LLC (PASS-THROUGH)	P		
1 LIBERTY SPECIAL STRATEGIES (PASS-THROUGH)	P		
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)
623			623
9,285			9,285
160,681			160,681

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	
			623
			9,285
			160,681

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
NANCY WARE SAPP PO BOX 341 OXFORD, PA 19363	PRESIDENT 10 00	0	0	0
DEBRA WARE KLINE PO BOX 341 OXFORD, PA 19363	VICE-PRESIDENT 7 00	0	0	0
BRIGHAM FARIA PO BOX 341 OXFORD, PA 19363	CO-TREASURER 3 00	4,550	0	0
PHILIP SAPP PO BOX 341 OXFORD, PA 19363	CO-TREASURER 3 00	4,450	0	0
KIMBERLY ZULEBA PO BOX 341 OXFORD, PA 19363	SECRETARY 5 00	3,700	0	0
ADAM SAPP PO BOX 341 OXFORD, PA 19363	BOARD MEMBER 3 00	2,500	0	0
CONNOR SAPP PO BOX 341 OXFORD, PA 19363	BOARD MEMBER 3 00	2,300	0	0

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>				
1 IN 6PO BOX 222033 SANTA CLARITA, CA 91322		PC	UNRESTRICTED	20,000
ARC OF CHESTER COUNTY 900 LAWRENCE DRIVE WEST CHESTER, PA 19380		PC	EDUCATION ADVOCACY PROGRAM	10,000
B FOUNDATION101 ROCKLAND CIRCLE WILMINGTON, DE 19803		PC	UNRESTRICTED	7,500
Total ▶ 3a				389,519

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>				
BOYS & GIRLS CLUBS OF DELAWARE 669 S UNION STREET WILMINGTON, DE 19805		PC	TENNIS AND ZUMBA PROGRAMS	10,731
BRANDYWINE CONSERVANCY I HOFFMANS MILL ROAD CHADDS FORD, PA 19317		PC	WATER IMPROVEMENT PROJECT - OXFORD	10,000
CAMP DREAMCATCHER 148 WEST STATE STREET SUITE 104 KENNETT SQUARE, PA 19348		PC	THERAPEUTIC AND EDUCATIONAL PROGRAMS	10,000
Total ▶ 3a				389,519

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>				
CAMP DREAMCATCHER 148 WEST STATE STREET SUITE 104 KENNETT SQUARE, PA 19348		PC	SUPPLIES REPLACEMENT FROM FLOOD	2,000
CHESTER COUNTY FUTURES 704 HAYWOOD DRIVE EXTON, PA 19341		PC	THREE CHESTER COUNTY PROGRAMS	15,000
DOMESTIC VIOLENCE CENTER OF CHESTER COUNTY PO BOX 832 WEST CHESTER, PA 19381		PC	OXFORD OFFICE	10,000
Total ▶ 3a				389,519

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>				
FAMILY PROMISE 1156 W BALTIMORE PIKE KENNETT SQUARE, PA 19348		PC	GENERAL OPERATING EXPENSES	12,000
FAMILY PROMISE 1156 W BALTIMORE PIKE KENNETT SQUARE, PA 19348		PC	AN EVENING OF PROMISE	383
GOOD NEIGHBORS 224 E STREET ROAD 2 KENNETT SQUARE, PA 19348		PC	LOW INCOME FAMILY HOME REPAIRS	15,000
Total ► 3a				389,519

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>				
HANDI-CRAFTERS 215 BARLEY SHEAF ROAD THORNDALE, PA 19372		PC	VOCATIONAL DEVELOPMENT OPERATIONS	15,000
LA COMUNIDAD HISPANA 731 WEST CYPRESS STREET KENNETT SQUARE, PA 19348		PC	MENTAL HEALTH SERVICES - OXFORD	25,000
LAND CONSERVANCY FOR SCC 541 CHANDLER MILL ROAD AVONDALE, PA 19311		PC	HAWK WATCH PROGRAM	5,000
Total ► 3a				389,519

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>				
LIGHTHOUSE YOUTH CENTER 245 COMMERCE STREET OXFORD, PA 17363		PC	OPERATING BUDGET	20,000
LIGHTHOUSE YOUTH CENTER 245 COMMERCE STREET OXFORD, PA 17363		PC	SPRING BANQUET	4,000
LIGHTHOUSE YOUTH CENTER 245 COMMERCE STREET OXFORD, PA 19363		PC	GOLF TOURNAMENT HOLE SPONDER	590
Total ▶ 3a				389,519

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
MAKE-A-WISH 5 VALLEY SQUARE SUITE 210 BLUE BELL, PA 19422		PC	GENERAL OPERATING EXPENSES	15,000
MEALS ON WHEELS 404 WILLOWBROOK LANE WEST CHESTER, PA 19382		PC	BACK TO SCHOOL FAIR	10,000
NOTTINGHAM PRESBYTERIAN CHURCH 497 WEST CHRISTINE ROAD NOTTINGHAM, PA 19362		PC	SPRING BANQUET	5,500
Total ▶ 3a				389,519

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>				
OXFORD AREA CHAMBER OF COMMERCE PO BOX 4 OXFORD, PA 19363		PC	DINNER DANCE	750
OXFORD AREA CHAMBER OF COMMERCE PO BOX 4 OXFORD, PA 19363		PC	GOLF TOURNAMENT HOLE SPONSOR	625
OXFORD AREA CIVIC ASSOCIATION PO BOX 34 OXFORD, PA 19363		PC	JHW,IV HUNGER HELP WALK	3,000
Total ▶ 3a				389,519

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>				
OXFORD EDUCATIONAL FOUNDATION PO BOX 142 OXFORD, PA 19363		PC	MENTORING & TUTORING PROGRAM	10,000
OXFORD MAINSTREET INCPO BOX 315 OXFORD, PA 19363		PC	STAFF	15,000
OXFORD MAINSTREET INCPO BOX 315 OXFORD, PA 19363		PC	UNDERWRITING	10,000
Total ▶ 3a				389,519

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>				
OXFORD MAINSTREET INCPO BOX 315 OXFORD, PA 19363		PC	MATCHING GIFT	2,500
OXFORD MAINSTREET INCPO BOX 315 OXFORD, PA 19363		PC	GALA	25,000
OXFORD PUBLIC LIBRARY 48 SOUTH SECOND STREET OXFORD, PA 19363		PC	MEMORY OF NANCY KODISH	3,000
Total ▶ 3a				389,519

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>				
OXFORD PUBLIC LIBRARY 48 SOUTH SECOND STREET OXFORD, PA 19363		PC	OPERATING BUDGET / CAMP	7,000
OXFORD ROTARYPO BOX 27 OXFORD, PA 19363		PC	CRAB FEAST TABLE SPONSORSHIP	440
SAFE HARBOR 20 NORTH MATLACK STREET WEST CHESTER, PA 19380		PC	GENERAL OPERATING EXPENSES	10,000
Total ▶ 3a				389,519

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>				
SILOPO BOX 22 OXFORD, PA 19363		PC	SNOWBALL	3,000
STROUD970 SPENCER ROAD AVONDALE, PA 19311		PC	FUTURE OF FRESH WATER INITIATIVE	20,000
THE CONNECTIVE FESTIVALPO BOX 315 OXFORD, PA 19363		PC	UNRESTRICTED	5,000
Total ▶ 3a				389,519

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>				
THE CONNECTIVE FESTIVALPO BOX 315 OXFORD, PA 19363		PC	LOCAL STAGE SPONSOR	5,000
WHITE CLAY SOCCER CLUBPO BOX 324 WEST GROVE, PA 19390		PC	REC PROGRAM & LIGHTHOUSE PROGRAM	11,500
WINGS FOR SUCCESSPO BOX 1184 FRAZER, PA 19355		PC	EDUCATIONAL WORKSHOP/CLOTHING	5,000
Total ▶ 3a				389,519

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>				
WOMEN'S MEDICAL FUNDPO BOX 40748 PHILADELPHIA, PA 19107		PC	CASE WORKER	10,000
YMCA880 W BALTIMORE PIKE WEST GROVE, PA 19390		PC	POWER SCHOLARS ACADEMY	10,000
YOUNG MOMS110 W STATE STREET KENNETT SQUARE, PA 19348		PC	GENERAL OPERATING EXPENSES	10,000
Total ▶ 3a				389,519

Form 990PF Part XVI-A Line 11 - Other revenue:

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See the instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
11 Other revenue					
a GLENMEDE PRIVATE INVESTMENT FUND IX (PASS-THROUGH)	900099	-1,022			
b GLENMEDE PRIVATE INVESTMENT FUND IX (PASS-THROUGH)			01	14,193	
c GLENMEDE PRIVATE INVESTMENT FUND VIII (PASS-THROUGH)	900099	-2,761			
d GLENMEDE PRIVATE INVESTMENT FUND VIII (PASS-THROUGH)			01	9,153	
e INDEPENDENCE GLOBAL FUND, LLC (PASS-THROUGH)	900099	-549			
f INDEPENDENCE GLOBAL FUND, LLC (PASS-THROUGH)			01	1,729	
g MISCELLANEOUS INCOME			01	497	
h LIBERTY SPECIAL STRATEGIES (PASS-THROUGH)			01	-10,854	

TY 2018 Accounting Fees Schedule**Name:** THE OXFORD AREA FOUNDATION**EIN:** 20-1060782

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	12,150	9,113		3,038

TY 2018 Investments Corporate Bonds Schedule

Name: THE OXFORD AREA FOUNDATION

EIN: 20-1060782

Investments Corporate Bonds Schedule

Name of Bond	End of Year Book Value	End of Year Fair Market Value
MUTUAL FUNDS - FIXED INCOME	2,690,617	2,498,882

TY 2018 Investments Corporate Stock Schedule**Name:** THE OXFORD AREA FOUNDATION**EIN:** 20-1060782**Investments Corporation Stock Schedule**

Name of Stock	End of Year Book Value	End of Year Fair Market Value
MUTUAL FUNDS - DOMESTIC EQUITY	3,165,284	3,262,259
MUTUAL FUNDS - INTERNATIONAL EQUITY	2,319,810	2,301,266
INVESTMENTS - STOCKS	2,415,872	2,326,181

TY 2018 Investments - Other Schedule

Name: THE OXFORD AREA FOUNDATION

EIN: 20-1060782

Investments Other Schedule 2

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
INVESTMENTS - ALTERNATIVE	AT COST	2,648,000	3,088,665

TY 2018 Land, Etc. Schedule

Name: THE OXFORD AREA FOUNDATION

EIN: 20-1060782

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
EQUIPMENT	19,646	16,782	2,864	2,864
FURNITURE	7,746	7,746	0	

TY 2018 Legal Fees Schedule**Name:** THE OXFORD AREA FOUNDATION**EIN:** 20-1060782

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	20,648	15,486		5,162

TY 2018 Other Decreases Schedule**Name:** THE OXFORD AREA FOUNDATION**EIN:** 20-1060782

Description	Amount
GLENMEDE PRIVATE INVESTMENT FUND VIII, LLC	13,017
GLENMEDE PRIVATE INVESTMENT FUND IX, LLC	433

TY 2018 Other Expenses Schedule**Name:** THE OXFORD AREA FOUNDATION**EIN:** 20-1060782**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OFFICE EXPENSES	7,726	1,545		6,181
DUES AND SUBSCRIPTIONS	750	150		600
WEBSITE	860	172		688

TY 2018 Other Income Schedule**Name:** THE OXFORD AREA FOUNDATION**EIN:** 20-1060782**Other Income Schedule**

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
GLENMEDE PRIVATE INVESTMENT FUND IX (PASS-THROUGH)	-1,022		-1,022
GLENMEDE PRIVATE INVESTMENT FUND IX (PASS-THROUGH)	14,193	14,193	14,193
GLENMEDE PRIVATE INVESTMENT FUND VIII (PASS-THROUGH)	-2,761		-2,761
GLENMEDE PRIVATE INVESTMENT FUND VIII (PASS-THROUGH)	9,153	9,153	9,153
INDEPENDENCE GLOBAL FUND, LLC (PASS-THROUGH)	-549		-549
INDEPENDENCE GLOBAL FUND, LLC (PASS-THROUGH)	1,729	1,729	1,729
MISCELLANEOUS INCOME	497	497	497
LIBERTY SPECIAL STRATEGIES (PASS-THROUGH)	-10,854	-10,854	-10,854

TY 2018 Other Increases Schedule**Name:** THE OXFORD AREA FOUNDATION**EIN:** 20-1060782

Description	Amount
INDEPENDENCE GLOBAL FUND, LLC	1,252
LIBERTY SPECIAL STRAGETIES, LLC	25,249

TY 2018 Other Professional Fees Schedule**Name:** THE OXFORD AREA FOUNDATION**EIN:** 20-1060782

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT ADVISOR FEES	147,045	147,045		0
OTHER	2,402	224		2,178

**TY 2018 Substantial Contributors
Schedule****Name:** THE OXFORD AREA FOUNDATION**EIN:** 20-1060782

Name	Address
JOHN H WARE III CLAT	C/O JP MORGAN ONE LIBERTY PLACE PHILADELPHIA, PA 19103
JOHN H WARE IV CLAT	C/O JP MORGAN ONE LIBERTY PLACE PHILADELPHIA, PA 19103
MARIAN S WARE CLAT	C/O JP MORGAN ONE LIBERTY PLACE PHILADELPHIA, PA 19103

TY 2018 Taxes Schedule**Name:** THE OXFORD AREA FOUNDATION**EIN:** 20-1060782

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAXES	50,379	0		0
FOREIGN TAXES	941	941		0

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF ▶ Go to www.irs.gov/Form990 for the latest information	OMB No 1545-0047
		2018
Name of the organization THE OXFORD AREA FOUNDATION		Employer identification number 20-1060782

Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	☐ 501(c)() (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. . . . ▶ \$ _____

Caution. An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization THE OXFORD AREA FOUNDATION	Employer identification number 20-1060782
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Part I **Contributors** (See instructions) Use duplicate copies of Part I if additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	MARIAN S WARE CHARITABLE LEAD ANNUITY TRUST C/O J P MORGAN ONE LIBERTY PLACE PHILADELPHIA, PA 19103	\$ 28,140	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Employer identification number

20-1060782

Part II	Noncash Property
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Schedule B (Form 990, 990-EZ, or 990-PF) (2018)

Name of organization THE OXFORD AREA FOUNDATION	Employer identification number 20-1060782
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Part III	Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ► \$ _____ Use duplicate copies of Part III if additional space is needed
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(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	