

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

Name of foundation THE FRANCES W BURTON FOUNDATION		A Employer identification number 20-4214804	
% FIRST WESTERN ADVISORS			
Number and street (or P O box number if mail is not delivered to street address) 3165 EAST MILLROCK DRIVE Suite 340	Room/suite	B Telephone number (see instructions) (801) 269-1818	
City or town, state or province, country, and ZIP or foreign postal code HOLLADAY, UT 84121		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) \$ 4,116,318	J Accounting method ☐ Cash ☒ Accrual ☐ Other (specify) _____ (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)	41,553			
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	98,291	98,291		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	82,204			
	b Gross sales price for all assets on line 6a <u>1,281,621</u>				
	7 Capital gain net income (from Part IV, line 2)		82,205		
	8 Net short-term capital gain			5,822	
	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)				
	12 Total. Add lines 1 through 11	222,048	180,496	5,822	
	13 Compensation of officers, directors, trustees, etc	0			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	1,420	1,420	0	0
	b Accounting fees (attach schedule)	4,098	4,098	0	0
	c Other professional fees (attach schedule)	34,154	34,154		
	17 Interest	313	313		
	18 Taxes (attach schedule) (see instructions)	2,937	2,937		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	193	193		
	24 Total operating and administrative expenses. Add lines 13 through 23	43,115	43,115	0	0
	25 Contributions, gifts, grants paid	270,175			270,175
	26 Total expenses and disbursements. Add lines 24 and 25	313,290	43,115	0	270,175
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-91,242			
	b Net investment income (if negative, enter -0-)		137,381		
c Adjusted net income (if negative, enter -0-)				5,822	

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						
	2 Savings and temporary cash investments	81,899	107,591	107,591			
	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)	3,972,300	3,809,329	4,008,727			
	c Investments—corporate bonds (attach schedule)						
	11 Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____						
	12 Investments—mortgage loans						
	13 Investments—other (attach schedule)						
	14 Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____						
15 Other assets (describe ▶ _____)							
16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	4,054,199	3,916,920	4,116,318				
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	4,054,199	3,916,920				
	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)	4,054,199	3,916,920				
31 Total liabilities and net assets/fund balances (see instructions) .	4,054,199	3,916,920					

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	4,054,199
2 Enter amount from Part I, line 27a	2	-91,242
3 Other increases not included in line 2 (itemize) ▶ _____	3	
4 Add lines 1, 2, and 3	4	3,962,957
5 Decreases not included in line 2 (itemize) ▶ _____	5	46,037
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	3,916,920

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)
1 a PUBLICLY TRADED SECURITIES		P		2018-12-31
b PUBLICLY TRADED SECURITIES		P		2018-12-31
c PUBLICLY TRADED SECURITIES-OPTIONS		P		2018-12-31
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 466,659		465,533	1,126
b 814,963		738,581	76,382
c 4,697			4,697
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(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	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			1,126
b			76,382
c			4,697
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	82,205
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	5,822

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	308,780	4,259,039	0 0725
2016	272,417	4,116,633	0 066175
2015	268,798	7,759,305	0 034642
2014	272,220	6,855,116	0 03971
2013	251,903	6,275,046	0 040144

2 Total of line 1, column (d)	2	0 253171
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 050634
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	4,457,513
5 Multiply line 4 by line 3	5	225,702
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,374
7 Add lines 5 and 6	7	227,076
8 Enter qualifying distributions from Part XII, line 4	8	270,175

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b	1	1,374
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	
3	Add lines 1 and 2.	3	1,374
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	1,374
6	Credits/Payments		
a	2018 estimated tax payments and 2017 overpayment credited to 2018	6a	
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d.	7	0
8	Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached	8	14
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	1,388
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	
11	Enter the amount of line 10 to be Credited to 2019 estimated tax Refunded	11	

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	
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ _____ (2) On foundation managers \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities	2	No
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3	No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	No
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T	5	No
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	
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) UT _____		
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	No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions.	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ N/A	13	Yes	
14	The books are in care of ▶ FIRST WESTERN ADVISORS Telephone no ▶ (801) 930-6500			

Located at **▶** 3165 E MILLROCK DR SUITE 340 HOLLADAY UT ZIP+4 **▶** 84121

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?	16	Yes	No
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the 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.

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. ☐	1b		
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		No
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 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	No
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
Total number of other employees paid over \$50,000.				

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
Total number of others receiving over \$50,000 for professional services.	▶	

Part IX-A Summary of Direct Charitable Activities

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

Part IX-B	Summary of Program-Related Investments (see instructions)
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Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3	

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities.	1a	4,484,125
b	Average of monthly cash balances.	1b	41,269
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	4,525,394
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	4,525,394
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	67,881
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	4,457,513
6	Minimum investment return. Enter 5% of line 5.	6	222,876

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	222,876
2a	Tax on investment income for 2018 from Part VI, line 5.	2a	1,374
b	Income tax for 2018 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	1,374
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	221,502
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	221,502
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	221,502

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	270,175
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	4	270,175
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions.	5	1,374
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	268,801

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				221,502
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only.			0	
b Total for prior years 2016, 2015, 2014		0		
3 Excess distributions carryover, if any, to 2018				
a From 2013. 57,647				
b From 2014.				
c From 2015. 14,362				
d From 2016. 69,501				
e From 2017. 96,540				
f Total of lines 3a through e.	238,050			
4 Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ 270,175				
a Applied to 2017, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2018 distributable amount.				221,502
e Remaining amount distributed out of corpus	48,673			
5 Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	286,723			
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.				
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				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).				
8 Excess distributions carryover from 2013 not applied on line 5 or line 7 (see instructions).	57,647			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	229,076			
10 Analysis of line 9				
a Excess from 2014.				
b Excess from 2015. 14,362				
c Excess from 2016. 69,501				
d Excess from 2017. 96,540				
e Excess from 2018. 48,673				

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)

2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

	Tax year	Prior 3 years			(e) Total
	(a) 2018	(b) 2017	(c) 2016	(d) 2015	
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

GARY TERAN
3165 EAST MILLROCK DRIVE
HOLLADAY, UT 84121
(801) 269-1818

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

AVAILABLE UPON REQUEST

c Any submission deadlines

DECEMBER 31ST OF EACH CALENDAR YEAR

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

NONE

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i> See Additional Data Table				
Total ▶ 3a				
b <i>Approved for future payment</i> WEBER STATE UNIVERSITY 4018 UNIVERSITY CIRCLE OGDEN, UT 84408	NONE	PC	ASSIST IN THE MISSION OF WEBER STATE UNIVERSITY	2,500
Total ▶ 3b				

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2018)

Part XVII

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

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

**Sign
Here**

**Paid
Preparer
Use Only**

May the IRS discuss this return with the preparer shown below

(see instr)? ☒ Yes ☐ No

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
KIM PLAUTZ 7941 S MAJESTIC RIDGE DRIVE SALT LAKE CITY, UT 84121	TRUSTEE 1 0	0	0	0
BRET GUNDERSON 146 EAST 1020 NORTH OREM, UT 84121				
GARY TERAN 6440 S MILLROCK DR HOLLADAY, UT 84121	MEMBER 1 0	0	0	0
ANDREA W BAUER 6720 NORTH SCOTTSDALE ROAD 170 SCOTTSDALE, AZ 85253				
JOHN S BRADLEY 111 EAST BROADWAY 11TH FLOOR SALT LAKE CITY, UT 84111	MEMBER 1 0	0	0	0
SCOTT BURTON 1192 E DRAPER PARKWAY STE 472 DRAPER, UT 84020				

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>				
CATHOLIC RELIEF SERVICES 228 W LEXINGTON STREET BALTIMORE, MD 21201	NONE	PC	ASSIST THE POOR AND VULNERABLE OVERSEAS & CHERISH PRESERVE & UPHOLD THE SACREDNESS AND DIGNITY OF ALL HUMAN LIFE	500
CATHOLIC SOCIAL SERVICES 1600 BAY STREET PO BOX M/SO STATION FALL RIVER, MA 02724	NONE	PC	PROVIDES ASSISTANCE TO INDIVIDUALS WHO FACE VARIOUS FORMS OF OPPRESSION AND INJUSTICE WITHIN SOUTHEASTERN MASSACHUSETTS	2,000
FOOD FOR THE POOR6401 LYONS ROAD COCONUT CREEK, FL 33073	NONE	PC	FEEDING HUNGRY INDIVIDUALS THROUGHOUT USA	500
Total ► 3a				270,175

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>				
HOLY SPIRIT CENTER ANCHORAGE 10980 HILLSIDE DRIVE ANCHORAGE, AK 99507	NONE	PC	PROVIDE SPIRITUAL GUIDANCE TO THOSE IN NEED	100
ST PATRICKS PARISH1058 W 400 S SALT LAKE CITY, UT 84104	NONE	PC	PROVIDE RELIGIOUS SERVICES AND OTHER AID TO PEOPLE IN NEED	2,000
ALASKA CHAMBER SINGERS P O Box 102055 Anchorage, AK 99510	NONE	PC	Enhancing cultural life in Anchorage	100
Total ► 3a				270,175

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>				
ALASKA SUDAN MEDICAL PROJECT PO BOX 230183 Anchorage, AK 99523	NONE	PC	Saving lives through health, clean water, & agriculture in South Sudan	250
OCEANS CONSERVANCY 1300 19th Street NW 8th Floor Washington DC, DC 20036	NONE	PC	Ocean protection, investing in research, leadership and advocacy that advances science-based solutions that work	250
ASSISTANCE LEAGUEPO BOX 9353 SALT LAKE CITY, UT 84109	NONE	PC	Improve the lives of children and adults in our community	5,000
Total ▶ 3a				270,175

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>				
BENNION COMMUNITY SERVICE CENTER 332 S 1400 E 150 Salt Lake City, UT 84112	NONE	PC	Inspire and Mobilize people to Strengthen communities through Learning, Scholarship, and Advocacy	5,000
CALDWELL FAMILY FOUNDATION PO BOX 1577 DRAPER, UT 84020	NONE	PF	Identifying and growing innovative educational programs Supporting programs to provide basic nutrition to school kids and needy families Helping fund family centered patient care and support and support	5,000
CATHOLIC COMMUNITY SERVICES 745 E 300 S Salt Lake City, UT 84102	NONE	PC	Empowering people in need along the Wasatch Front to reach self-sufficiency	5,000
Total ► 3a				270,175

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>				
OMAHA CHILDREN'S FOUNDATION 8401 W DODGE ROAD 120 OMAHA, NE 68114	NONE	PC	Provide needed medical care and support for children and their families	17,500
IHC Festival of Trees 36 South State Street Salt Lake City, UT 84111	NONE	PC	To help children at Primary Childrens Hospital Primary Children's Hospital ensures that every child receives the best medical care possible, regardless of race, religion, or ability to pay	9,650
PARTNERING FOR PROGRESS PO BOX 28191 SPOKANE, WA 99228	NONE	PC	Build relationships with villages in Kenyas Kopanga region to help them create flourishing communities by improving their quality of life in the areas most important to them	5,000
Total ▶ 3a				270,175

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>				
RISING STAR OUTREACH 3521 N UNIVERSITY AVENUE STE 250 PROVO, UT 84604	NONE	PC	Empower individuals and families to rise above the stigma associated with leprosy and to live healthy, productive lives through quality education, medical care, and community development	10,000
UTAH FOOD BANK3150 S 900 W SALT LAKE CITY, UT 84119	NONE	PC	FIGHTING HUNGER IN THE STATE OF UTAH	10,000
ANGEL HANDS11152 SUNUP WAY SOUTH JORDAN, UT 84009	NONE	PC	Improve the quality of life for individuals living with rare diseases	2,500
Total ▶ 3a				270,175

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>				
UTAH DINE BIKEYAH 352 S DENVER ST 315 SALT LAKE CITY, UT 84111	NONE	PC	PRESERVE AND PROTECT THE CULTURAL AND NATURAL RESOURCES OF ANCESTRAL NATIVE AMERICAN LANDS TO BENEFIT AND BRING HEALING TO PEOPLE AND THE EARTH	7,500
SAVE OUR CANYONS 824 SOUTH 400 WEST B115 SALT LAKE CITY, UT 84101	NONE	PC	TO PROTECT AND SAVE THE WILDNESS & BEAUTY OF THE WASATCH MOUNTAINS, CANYONS, AND FOOTHILLS	7,500
ANCHORAGE GOSPEL RESCUE MISSION 2823 E TUDOR ROAD ANCHORAGE, AK 99507	NONE	PC	PROVIDES BED'S FOR SIGNLE MEN & WOMEN AS WELL AS HOT MEALS, CLOTHES, ETC	100
Total ► 3a				270,175

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>				
ADOPT A NATIVE ELDERPO BOX 3401 PARK CITY, UT 84060	NONE	PC	HELP BRIDGE THE GAP BETWEEN NATIVE AMERICANS AND OTHER CULTURES	5,000
ALASKA AUDUBON SOCIETY 431 WEST 7TH AVE SUITE 101 ANCHORAGE, AK 99501	NONE	PC	HELP PROTECT BIRDS AND OTHER WILDLIFE	125
ALASKA PUBLIC MEDIA 3877 UNIVERSITY DRIVE ANCHORAGE, AK 99508	NONE	PC	PROMOTE BROADCASTING IN ALASKA	100
Total ► 3a				270,175

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				
AMERICAN RED CROSS 555 E 200 S STE 200 SALT LAKE CITY, UT 84102	NONE	PC	HELP THOSE AFFECTED BY DISASTERS	5,000
BROTHER FRANCIS SHELTER KODIAK 410 THORSHEIM STREET KODIAK, AK 99615	NONE	PC	PROVIDE A SPACE FOR INDIVIDUALS WITHOUT HOMES	250
CHOICE HUMANITARIAN 7879 S 1530 W 200 WEST JORDAN, UT 84088	NONE	PC	HELP REDUCE EXTREME POVERTY	10,000
Total ▶ 3a				270,175

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>				
COMMUNITY NURSING SERVICES 2830 S REDWOOD WOAD SUITE A WEST VALLEY CITY, UT 84119	NONE	PC	PROVIDES CARE WHEN INDIVIDUALS SUFFER SERIOUS INJURY OR ILLNESS	10,000
COVENANT HOUSE461 EIGHTH AVENUE NEW YORK, NY 10001	NONE	PC	HELPING HOMELESS AND CHILDREN	250
DOCTORS WITHOUT BORDERS 333 7TH AVE 2ND FLOOR NEW YORK, NY 10001	NONE	PC	PROVIDE MEDICAL TREATMENT TO INDIVIDUALS ACROSS THE GLOBE	500
Total ▶ 3a				270,175

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i>				
HABITAT FOR HUMANITY PO BOX 682704 PARK CITY, UT 84096	NONE	PC	ENGAGE IN NEIGHBORHOOD REVITALIZATION, SHELTER INNOVATION, DISASTER RESPONSE, ETC	10,500
GIFT OF LIFE INTERNATIONAL PO BOX 650436 FRESH MEADOWS, NY 11365	NONE	PC	Provide HOPE to children with heart disease and their families, EMPOWER doctors and nurses to treat children in their country of birth, and build SUSTAINABLE pediatric cardiac programs in emerging countries through PARTNERSHIPS with like-minded organizations, maximizing our impact	19,000
THE HAPPY FACTORY896 N 1275 W CEDAR CITY, UT 84721	NONE	PC	GIVE AWAY TOYS TO CHILDREN IN NEED	5,000
Total ▶ 3a				270,175

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>				
BEAN'S CAFE1020 E 4TH AVE ANCHORAGE, AK 99501	NONE	PC	FEEDING THE HUNGRY AND HOMELESS	500
UNITED WAY (ANCHORAGE) 701 W 8TH AVE 230 ANCHORAGE, AK 99501	NONE	PC	FOCUSED ON CREATING COMMUNITY-BASED AND COMMUNITY-LED SOLUTIONS THAT STRENGTHEN THE CORNERSTONES FOR A GOOD QUALITY OF LIFE EDUCATION, FINANCIAL STABILITY, AND HEALTH	5,000
EQUAL JUSTICE INITIATIVE 122 COMMERCE STREET MONTGOMERY, AL 36104	NONE	PC	THE EQUAL JUSTICE INITIATIVE IS COMMITTED TO ENDING MASS INCARCERATION AND EXCESSIVE PUNISHMENT IN THE UNITED STATES, TO CHALLENGING RACIAL AND ECONOMIC INJUSTICE, AND TO PROTECTING BASIC HUMAN RIGHTS FOR THE MOST VULNERABLE PEOPLE IN AMERICAN SOCIETY	250
Total ► 3a				270,175

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>				
SHELTER BOX USA 7359 MERCHANT COURT SARASOTA, FL 34240	NONE	PC	PROVIDES DISASTER RELIEF	500
NATURE CONSERVANCY OF ALASKA 715 L ST 100 ANCHORAGE, AK 99501	NONE	PC	PROTECTING NATURE, CONSERVING LIFE	750
DAYS FOR GIRLSPO BOX 2622 MT VERNON, WA 98273	NONE	PC	Increase access to menstrual care and education by developing global partnerships, cultivating social enterprises, mobilizing volunteers, and innovating sustainable solutions that shatter stigmas and limitations for women and girls and girls	2,500
Total ▶ 3a				270,175

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>				
HIDDEN VALLEY GIVES BACK 11820 S HIGHLAND DRIVE SANDY, UT 84092	NONE	PC	GENERAL CHARITABLE PURPOSES	3,000
NATIONAL ABILITY CENTER PO BOX 682799 PARK CITY, UT 84068	NONE	PC	EMPOWERS INDIVIDUALS TO BUILD SELF ESTEEM, CONFIDENCE, AND LIFETIME SKILLS THROUGH SPORTS, RECREATION, AND EDUCATION	7,000
WOMEN OF THE WORLD 3347 MAIN STREET SOUTH SALT LAKE, UT 84115	NONE	PC	Empowering women from all nations to achieve independence, economic success, and a voice in the community	5,000
Total ▶ 3a				270,175

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>				
TREKKING FOR KIDSPO BOX 25493 WASHINGTON, DC 20027		PC	Provide kids with a truly unique opportunity to combine their thirst for adventure and the outdoors with their desire to help those less fortunate TFK focuses on the orphans who live in the shadows of the worlds most coveted adventure destinations	3,000
THE BRADLEY CENTERPO BOX 1115 WEST JORDAN, UT 84088	NONE	PC	Provide support for children, teens, young adults and their families following a death through peer support groups, training and education education	5,000
OPERATION UNDERGROUND RAILROAD 755 SOUTH MAIN STREET SUITE 194 CEDAR CITY, UT 84720	NONE	PC	BRING AN END TO CHILD SLAVERY	10,000
Total ► 3a				270,175

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>				
NATIONAL MULTIPLE SCLEROSIS 101A 1ST AVE WALTHAM, MA 02451	NONE	PC	PROVIDES FUNDING FOR MS RESEARCH AND TREATMENTS	10,000
SONS OF BASEBALL 3165 MILLROCK DRIVE SALT LAKE CITY, UT 84121	NONE	PC	BRING CHILDREN LIVING WITH DISABILITIES OR BATTLING LIFE THREATENING MEDICAL CONDITIONS TOGETHER WITH THE BASEBALL COMMUNITY TO CREATE POSITIVE AND LASTING BASEBALL EXPERIENCES	5,000
TRUCKING FOR KIDSP0 BOX 1498 PRIEST RIVER, ID 838561498	NONE	PC	PROVIDE CHILDREN'S CHARITIES WITH FUNDS TO HELP KIDS IN NEED	1,000
Total ▶ 3a				270,175

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>				
NORTHERN UTAH AUTISM PROGRAM 1100 ORCHARD AVE OGDEN, UT 84404	NONE	PC	Provide early intervention program for children diagnosed with Autism or Pervasive Developmental Disorder (PDD)	2,500
NEIGHBORHOOD HOUSE1050 W 500 S SALT LAKE CITY, UT 84104	NONE	PC	NEIGHBORHOOD HOUSE HELPS LOW-INCOME FAMILIES SUCCEED BY PROVIDING QUALITY, AFFORDABLE DAY CARE AND SUPPORT SERVICES TO CHILDREN AND ADULTS	33,000
MILLIE'S FOUNDATIONS 2873 E ETINNE WAY SANDY, UT 84093	NONE	PC	RAISES MONEY FOR CANCER RESEARCH	15,000
Total ► 3a				270,175

TY 2018 Accounting Fees Schedule**Name:** THE FRANCES W BURTON FOUNDATION**EIN:** 20-4214804

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	4,098	4,098		

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 FRANCES W BURTON FOUNDATION

EIN: 20-4214804

TY 2018 Investments Corporate Stock Schedule**Name:** THE FRANCES W BURTON FOUNDATION**EIN:** 20-4214804**Investments Corporation Stock Schedule**

Name of Stock	End of Year Book Value	End of Year Fair Market Value
EQUITIES	3,809,329	4,008,727

TY 2018 Legal Fees Schedule**Name:** THE FRANCES W BURTON FOUNDATION**EIN:** 20-4214804

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL	1,420	1,420		

TY 2018 Other Decreases Schedule

Name: THE FRANCES W BURTON FOUNDATION

EIN: 20-4214804

Description	Amount
PRIOR PERIOD ADJUSTMENTS	46,037

TY 2018 Other Expenses Schedule**Name:** THE FRANCES W BURTON FOUNDATION**EIN:** 20-4214804**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEES	193	193		

TY 2018 Other Professional Fees Schedule**Name:** THE FRANCES W BURTON FOUNDATION**EIN:** 20-4214804

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MANAGEMENT FEES	34,154	34,154		

TY 2018 Taxes Schedule**Name:** THE FRANCES W BURTON FOUNDATION**EIN:** 20-4214804

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	2,454	2,454		
FOUNDATION TAXES	483	483		

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 <u>www.irs.gov/Form990</u> for the latest information	OMB No 1545-0047 2018
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Name of the organization THE FRANCES W BURTON FOUNDATION	Employer identification number 20-4214804
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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 FRANCES W BURTON FOUNDATION	Employer identification number 20-4214804
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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	ROBERT BRYNER	\$ 20,000	Person ☒
	144 E 300 N		Payroll ☐
	LOGAN, UT 84321		Noncash ☐ (Complete Part II for noncash contributions)
2	R DIRK NOYES	\$ 10,000	Person ☒
	376 N CRESTLINE CIR		Payroll ☐
	SALT LAKE CITY, UT 84103		Noncash ☐ (Complete Part II for noncash contributions)
3	KONRAD C KALTENBORN TRUST	\$ 11,553	Person ☐
	3165 E MILLROCK DR 340		Payroll ☐
	HOLLADAY, UT 84121		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

20-4214804

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

Name of organization THE FRANCES W BURTON FOUNDATION	Employer identification number 20-4214804
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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