

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

Name of foundation GOOD HEART WORK SMART FOUNDATION		A Employer identification number 20-5836042	
Number and street (or P.O. box number if mail is not delivered to street address) 1010 LAKE STREET SUITE 200		Room/suite	
City or town, state or province, country, and ZIP or foreign postal code OAK PARK, IL 60301		B Telephone number (see instructions) (708) 725-3129	
G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ 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) ▶ \$ 2,143,836		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here	
J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) (Part I, column (d) must be on cash basis)			

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)	2,926,571			
	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				
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)		0		
	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)				
	12 Total. Add lines 1 through 11	2,926,571	0	0	
	13 Compensation of officers, directors, trustees, etc	0	0	0	0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	6,080	0	0	0
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)				
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	1,311,024	1,291,004	0	0
	24 Total operating and administrative expenses. Add lines 13 through 23	1,317,104	1,291,004	0	0
	25 Contributions, gifts, grants paid	1,002,179			1,002,179
	26 Total expenses and disbursements. Add lines 24 and 25	2,319,283	1,291,004	0	1,002,179
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	607,288			
	b Net investment income (if negative, enter -0-)		0		
				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	124,892	25,418	25,418		
	2	Savings and temporary cash investments					
	3	Accounts receivable ▶ <u>18,418</u>					
		Less allowance for doubtful accounts ▶ _____	13,473	18,418	18,418		
	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 ▶ _____	10,000	0	0		
	8	Inventories for sale or use					
	9	Prepaid expenses and deferred charges					
	10a	Investments—U S and state government obligations (attach schedule)					
	b	Investments—corporate stock (attach schedule)					
	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)	1,177,945	0	0			
14	Land, buildings, and equipment basis ▶ _____						
	Less accumulated depreciation (attach schedule) ▶ _____						
15	Other assets (describe ▶ _____)	228,802	2,100,000	2,100,000			
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	1,555,112	2,143,836	2,143,836			
Liabilities	17	Accounts payable and accrued expenses	1,250	41,153			
	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)	1,250	41,153			
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					
	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	0	0			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0			
	29	Retained earnings, accumulated income, endowment, or other funds	1,553,862	2,102,683			
	30	Total net assets or fund balances (see instructions)	1,553,862	2,102,683			
31	Total liabilities and net assets/fund balances (see instructions) .	1,555,112	2,143,836				

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	1,553,862
2	Enter amount from Part I, line 27a	2	607,288
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	2,161,150
5	Decreases not included in line 2 (itemize) ▶ _____	5	58,467
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	2,102,683

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			

(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			
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			
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	
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	1,117,455	7,525	148 499003
2016	1,113,797	10,260	108 557212
2015	556,025	0	0 000000
2014	372,134	0	0 000000
2013	328,807	0	0 000000

2 Total of line 1, column (d)	2	257 056215
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	51 411243
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	38,158
5 Multiply line 4 by line 3	5	1,961,750
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	0
7 Add lines 5 and 6	7	1,961,750
8 Enter qualifying distributions from Part XII, line 4 ,	8	1,002,179

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	0
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	0
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	0
6	Credits/Payments		
a	2018 estimated tax payments and 2017 overpayment credited to 2018	6a	0
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	0
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	0
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed ▶	9	0
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). <i>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</i>	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 ▶ \$ _____ (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? <i>If "Yes," attach a detailed description of the activities</i>	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? <i>If "Yes," attach a conformed copy of the changes</i>	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? <i>If "Yes," attach the statement required by General Instruction T</i>	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? <i>If "Yes," complete Part II, col (c), and Part XV</i>	7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ <u>IL</u>		
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? <i>If "No," attach explanation</i> .	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. <i>If "Yes," complete Part XIV</i>	9	No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	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 ► MARY JO SCHULER Telephone no ► (708) 725-3129			

Located at **►** 1010 LAKE STREET SUITE 200 OAK PARK IL ZIP+4 **►** 60301

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		
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)

		Yes	No
5a	During the year did the foundation pay or incur any amount to		
(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
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870	6b	
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes	☒ No
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	7b	
8	Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment during the year?	☐ 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
NONE		
Total number of others receiving over \$50,000 for professional services.		0

Part IX-A **Summary of Direct Charitable Activities**

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

	Expenses
1	
2	
3	
4	

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

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities.	1a	0
b	Average of monthly cash balances.	1b	38,739
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	38,739
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	38,739
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	581
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	38,158
6	Minimum investment return. Enter 5% of line 5.	6	1,908

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	1,908
2a	Tax on investment income for 2018 from Part VI, line 5.	2a	
b	Income tax for 2018 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	0
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	1,908
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	1,908
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	1,908

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	1,002,179
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	1,002,179
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	1,002,179

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				1,908
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2018				
a From 2013.	328,807			
b From 2014.	372,134			
c From 2015.	556,025			
d From 2016.	1,113,797			
e From 2017.	1,117,455			
f Total of lines 3a through e.	3,488,218			
4 Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ <u>1,002,179</u>				
a Applied to 2017, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2018 distributable amount.				1,908
e Remaining amount distributed out of corpus	1,000,271			
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	4,488,489			
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				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).	0			
8 Excess distributions carryover from 2013 not applied on line 5 or line 7 (see instructions).	328,807			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	4,159,682			
10 Analysis of line 9				
a Excess from 2014.	372,134			
b Excess from 2015.	556,025			
c Excess from 2016.	1,113,797			
d Excess from 2017.	1,117,455			
e Excess from 2018.	1,000,271			

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)) See Additional Data Table	
b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest	
2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:	
Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions.	
a The name, address, and telephone number or email address of the person to whom applications should be addressed	
b The form in which applications should be submitted and information and materials they should include	
c Any submission deadlines	
d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors	

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

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

Enter gross amounts unless otherwise indicated

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions.)

[illegible]

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

- | | | | | |
|--|--|--------------|------------|-----------|
| 1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? | | | Yes | No |
| a Transfers from the reporting foundation to a noncharitable exempt organization of | | | | |
| (1) Cash. | | 1a(1) | | No |
| (2) Other assets. | | 1a(2) | | No |
| b Other transactions | | | | |
| (1) Sales of assets to a noncharitable exempt organization. | | 1b(1) | | No |
| (2) Purchases of assets from a noncharitable exempt organization. | | 1b(2) | | No |
| (3) Rental of facilities, equipment, or other assets. | | 1b(3) | | No |
| (4) Reimbursement arrangements. | | 1b(4) | | No |
| (5) Loans or loan guarantees. | | 1b(5) | | No |
| (6) Performance of services or membership or fundraising solicitations. | | 1b(6) | | No |
| c Sharing of facilities, equipment, mailing lists, other assets, or paid employees. | | 1c | | No |
| d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received | | | | |

[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.

*****	2019-08-20	*****
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 STANLEY KOT	Preparer's Signature	Date	Check if self-employed ☐	PTIN P00948843
	Firm's name ▶ RSM US LLP				Firm's EIN ▶ 42-0714325
	Firm's address ▶ ONE SOUTH WACKER DRIVE SUITE 800 CHICAGO, IL 606063392				Phone no (312) 634-3400

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
MARY JO SCHULER	OFFICER 10 00	0	0	0
315 N EUCLID AVENUE OAK PARK, IL 60302				
STEPHEN G SCHULER	OFFICER 1 00	0	0	0
315 N EUCLID AVENUE OAK PARK, IL 60302				
SUSAN MIKA	OFFICER 10 00	0	0	0
330 S LOMBARD AVENUE LOMBARD, IL 60148				
STACY WETTSTEIN	OFFICER 1 00	0	0	0
1235 ASHLAND AVENUE RIVER FOREST, IL 60305				
MELVIN F PHILLIPS JR	OFFICER 1 00	0	0	0
1211 W CERMAK ROAD BROADVIEW, IL 60155				

Form 990PF Part XV Line 1a - List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000).

MARY JO SCHULER
STEPHEN G SCHULER

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>				
19TH CENTURY CLUB178 FOREST AVE OAK PARK, IL 60301	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	7,500
ACTIVE TRANSPORTATION ALLIANCE 35 E WACKER 1782 CHICAGO, IL 60601	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	40,000
ALL IN FOR ETHAN155 AKENSIDE RD RIVERSIDE, IL 60546	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	500
Total ▶ 3a				1,002,179

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>				
ALLIANCE FOR GREAT LAKES 150 N MICHIGAN AVE CHICAGO, IL 60601	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	1,000
AMERICAN CANCER SOCIETY 225 MICHIGAN AVENUE 1200 CHICAGO, IL 60601	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	500
AMITY123 PARK AVE RIVER FOREST, IL 60305	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	3,000
Total ▶ 3a				1,002,179

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				
ANIMAL CARE LEAGUE 1013 GARFIELD ST OAK PARK, IL 60304	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	1,000
ASCEND TOGETHERORG 2920 N SPARKMAN BLVD TUSCON, AZ 85716	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	500
ASCENSION CATHOLIC CHURCH 808 S EAST AVE OAK PARK, IL 60304	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	8,300
Total ▶ 3a				1,002,179

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>				
ASPIRE OF ILLINOIS1815 S WOLF RD HILLSIDE, IL 60162	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	2,000
AUTISM SPEAKS 3500 W PETERSON AVE SUITE 204 CHICAGO, IL 60659	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	2,000
BEST BUDDIES ILLINOIS 101 W GRAND AVE 400 CHICAGO, IL 60654	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	1,000
Total ▶ 3a				1,002,179

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>				
BIG SHOULDERS FUND 212 W VAN BUREN ST 900 CHICAGO, IL 60607	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	500
BRAVO325 S KENILWORTH AVE OAK PARK, IL 60302	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	1,000
BUILD CHICAGO5100 W HARRISON ST CHICAGO, IL 60644	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	3,500
Total ▶ 3a				1,002,179

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>				
CALIFORNIA COMMUNITY FOUNDATION 221 S FIGUEROA ST SUITE 400 LOS ANGELES, CA 90012	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	500
CAST416 S RIDGELAND AVE OAK PARK, IL 60302	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	1,000
CHICAGO FOUNDATION FOR WOMEN 140 S DEARBORN ST 400 CHICAGO, IL 60603	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	7,000
Total ▶ 3a				1,002,179

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>				
CHICAGO PUBLIC MEDIA 848 EAST GRAND AVENUE CHICAGO, IL 60611	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	512
CHICAGO SURVIVORS 1010 WEST 35TH SUITE 510 CHICAGO, IL 60609	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	800
CHICAGO TENNIS PATRONS 2200 E DEVON AVE STE 319 DES PLAINS, IL 60018	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	3,000
Total ▶ 3a				1,002,179

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>				
COLLABORATION FOR EARLY CHILDHOOD CARE OAK PARK VILLAGE HALL 123 MADISON S OAK PARK, IL 60302	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	40,000
CONCORDIA UNIVERSITY 7400 AUGUSTA ST RIVER FOREST, IL 60305	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	2,000
CONVERGENCE1133 19TH ST NW 410 WASHINGTON, DC 20036	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	10,000
Total ▶ 3a				1,002,179

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>				
CROP WALK3460 LAKE STREET OAK PARK, IL 60302	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	500
DOMESTIC VIOLENCE OUTREACH 3525 SOUTH LAKE PARK AVENUE CHICAGO, IL 60653	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	1,500
DOMINICAN UNIVERSITY 7900 DIVISION ST RIVER FOREST, IL 60305	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	47,000
Total ▶ 3a				1,002,179

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>				
DWELL WITH DIGNITY3112 HOOD ST DALLAS, TX 75219	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	5,000
EQUITY TEAM INC 1103 WESTGATE ST STE 202 OAK PARK, IL 60301	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	100,000
ERNEST HEMINGWAY FOUNDATION PO BOX 2222 OAK PARK, IL 60303	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	2,500
Total ▶ 3a				1,002,179

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>				
EVANS SCHOLARS FOUNDATION ONE BRIAR ROAD GOLF, IL 60029	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	500
FRANK LLOYD WRIGHT PRESERVATION TRUST 209 S LASALLE ST CHICAGO, IL 60604	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	3,500
FREEDOM HOUSE701 BELLEFOTE AVE OAK PARK, IL 60302	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	5,000
Total ▶ 3a				1,002,179

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>				
FRIENDLY SCHOOL OF FOLK MUSIC 6731 ROOSEVELT RD BERWYN, IL 60402	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	2,000
FRIENDS OF THE CHILDREN 1612 SOUTH BLVD EVANSTON, IL 60202	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	34,000
FRIENDS OF THE OAK PARK CONSERVATORY 615 GARFIELD ST OAK PARK, IL 60304	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	2,000
Total ▶ 3a				1,002,179

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>				
GLENBARD EAST ATHLETIC BOOSTERS C/O ATHLETIC DEPT 1014 S MAIN ST LOMBARD, IL 60148	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	2,000
GO GREEN OAK PARK 222 N MARION ST APT 2H OAK PARK, IL 60302	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	500
GRANDE PARK PTA 26933 GRANDE PARK BLVD PLAINFIELD, IL 60585	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	100
Total ▶ 3a				1,002,179

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>				
HEPHZIBAH946 NORTH BLVD OAK PARK, IL 60301	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	9,500
HORIZONS FOR YOUTH 703 WEST MONROE STREET CHICAGO, IL 60661	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	1,500
HOUSING FORWARD 6634 ROOSEVELT RD OAK PARK, IL 60304	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	1,000
Total ▶ 3a				1,002,179

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>				
IRVING SCHOOL PTO 1125 S CUYLER AVE OAK PARK, IL 60304	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	1,000
JACK & JILL OF AMERICA INC 1930 17TH ST NW WASHINGTON, DC 20009	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	1,000
KAPPA ALPHA THETA 3018 UNIVERSITY BLVD DALLAS, TX 75205	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	250
Total ▶ 3a				1,002,179

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				
LAURA KIEFER MEMORIAL FOUNDATION 1250 S ARDMORE AVE VILLA PARK, IL 60181	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	2,000
LEAGUE OF WOMEN VOTERS OF OP PO BOX 3301 OAK PARK, IL 60303	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	1,000
LEGACY FLIGHT ACADEMY 159 N MARION ST OAK PARK, IL 60301	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	1,000
Total ▶ 3a				1,002,179

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>				
MAYWOOD FINE ARTS25 N 5TH AVE MAYWOOD, IL 60153	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	11,000
MERCY HOME FOR BOYS & GIRLS 1140 W JACKSON BLVD CHICAGO, IL 60607	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	1,000
MISERICORDIA 6300 NORTH RIDGE AVENUE CHICAGO, IL 60660	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	5,700
Total ▶ 3a				1,002,179

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>				
NAMI814 HARRISON ST OAK PARK, IL 60304	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	2,000
NATIONAL REDISTRICTING FUND 700 13TH ST NW STE 600 WASHINGTON, DC 20005	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	10,000
NETWORK FOR GOOD 1140 CONNECTICUT AVE NW STE 700 WASHINGTON, DC 20036	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	1,000
Total ▶ 3a				1,002,179

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>				
NEW FOUNDATION OF HOPE 8146 KEDZIE AVE CHICAGO, IL 60652	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	500
NEW MOMS 5317 WEST CHICAGO AVENUE CHICAGO, IL 60651	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	14,000
OAK PARK EDUCATION FOUNDATION 260 MADISON ST OAK PARK, IL 60302	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	25,000
Total ► 3a				1,002,179

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>				
OAK PARK REGIONAL HOUSING CENTER 1041 SOUTH BLVD OAK PARK, IL 60302	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	5,000
OAK PARK TENNIS CENTER PO BOX 5376 RIVER FOREST, IL 60305	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	2,000
OPEN DOOR REPRETORY 902 S RIDGELAND AVE OAK PARK, IL 60304	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	10,000
Total ▶ 3a				1,002,179

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>				
OPENLANDS 25 E WASHINGTON ST STE 1650 CHICAGO, IL 60602	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	2,000
OPPORTUNITY KNOCKS 8020 MADISON ST RIVER FOREST, IL 60305	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	11,500
OPRF COMMUNITY FOUNDATION 1049 LAKE ST 204 OAK PARK, IL 60301	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	258,887
Total ▶ 3a				1,002,179

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>				
OPRF FOOD PANTRY848 LAKE ST OAK PARK, IL 60301	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	1,500
OPRF HIGH SCHOOL201 SCOVILLE AVE OAK PARK, IL 60302	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	20,000
OPRF INFANT WELFARE SOCIETY 320 LAKE STREET OAK PARK, IL 60302	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	6,000
Total ▶ 3a				1,002,179

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>				
OUNCE OF PRESERVATION FUND 33 WEST MONROE STREET SUITE 1200 CHICAGO, IL 60603	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	5,000
PACTT LEARNING CENTER 1040 NORTH BLVD 250 OAK PARK, IL 60301	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	1,500
PARENTHESIS405 S EUCLID AVE OAK PARK, IL 60302	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	2,000
Total ▶ 3a				1,002,179

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>				
PARKS FOUNDATION OF OAK PARK 218 MADISON ST OAK PARK, IL 60302	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	4,500
PEACE ACTION EDUCATION FUND 501 SHATTO PI 260 LOS ANGELES, CA 90020	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	300
PINGPO BOX 1963 OAK PARK, IL 60304	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	2,000
Total ▶ 3a				1,002,179

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>				
PLEASANT HOME FOUNDATION 217 HOME AVE OAK PARK, IL 60302	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	1,500
PRO BONO NETWORKPO BOX 469 OAK PARK, IL 60303	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	3,030
PRO MUSICA YOUTH CHORUS PO BOX 2082 OAK PARK, IL 60303	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	3,000
Total ▶ 3a				1,002,179

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>				
PROVIDENCE ST MEL 119 S CENTRAL PARK BLVD CHICAGO, IL 60604	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	500
RAPE VICTIM ADVOCATES 180 N MICHIGAN AVE STE 600 CHICAGO, IL 60601	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	1,000
RISE FIELD HOCKEY218 MADISON OAK PARK, IL 60302	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	5,000
Total ▶ 3a				1,002,179

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>				
RONALD MCDONALD HOUSE ONE KROC DRIVE OAK BROOK, IL 60523	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	1,000
SALK INSTITUTE FOR BIOLOGICAL STUDIES 10010 N TORREY PINES RD LA JOLLA, CA 92037	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	10,000
SARAH'S INN309 HARRISON ST OAK PARK, IL 60304	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	115,000
Total ▶ 3a				1,002,179

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>				
SOUTHERN METHODIST UNIVERSITY 6425 BOAZ LANE DALLAS, TX 75205	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	3,000
SPECIAL OLYMPICS605 E WILLOW ST NORMAL, IL 61761	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	2,500
STECKMAN STUDIO OF MUSIC 829 S OAK PARK AVE OAK PARK, IL 60304	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	1,000
Total ▶ 3a				1,002,179

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 CATALYST SCHOOL 6727 S CALIFORNIA AVE CHICAGO, IL 60629	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	1,000
THE CHICAGO COUNCIL ON GLOBAL AFFAIRS 180 NORTH STETSON AVENUE SUITE 1400 CHICAGO, IL 60601	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	1,000
THE DAY NURSERY1139 RANDOLPH ST OAK PARK, IL 60302	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	2,000
Total ▶ 3a				1,002,179

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 FIELD SCHOOL OF OAK PARK 931 LAKE ST OAK PARK, IL 60301	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	1,000
THE FRANCIS XAVIER WARDE SCHOOL 751 N STATE ST CHICAGO, IL 60654	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	20,000
THE HISTORICAL SOCIETY OF OPRF 129 LAKE ST OAK PARK, IL 60302	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	1,000
Total ▶ 3a				1,002,179

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 MUSIC SCHOOL 150 N OAK PARK AVE OAK PARK, IL 60301	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	500
THRIVE120 S MADISON ST OAK PARK, IL 60302	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	17,500
TRITON COLLEGE FOUNDATION 2000 5TH AVE RIVER GROVE, IL 60171	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	2,500
Total ▶ 3a				1,002,179

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>				
TWIN LAKE RESCUE SQUAD 236 E MAIN ST TWIN LAKES, WI 53181	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	300
UNITY CHURCH OF OAK PARK 405 N EUCLID AVE OAK PARK, IL 60302	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	500
UNITY HOSPICE2366 OAK RIDGE CIR DE PERE, WI 54115	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	1,000
Total ▶ 3a				1,002,179

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>				
UNITY TEMPLE875 LAKE ST OAK PARK, IL 60301	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	1,000
VOCEL5317 W CHICAGO AVE CHICAGO, IL 60651	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	2,500
WE GROW DREAMS 1055 W WASHINGTON ST WEST CHICAGO, IL 60185	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	5,000
Total ▶ 3a				1,002,179

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>				
WEST COOK YMCA255 S MARION ST OAK PARK, IL 60302	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	7,500
WOMEN'S GLOBAL EDUCATION PROJECT 136 N MARION ST SUITE 201 OAK PARK, IL 60301	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	2,500
WONDER WORKS6445 W NORTH AVE OAK PARK, IL 60302	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	4,000
Total ▶ 3a				1,002,179

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>				
WSRRA2915 MAPLE ST FRANKLIN PARK, IL 60131	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	2,000
WSSRF2915 MAPLE ST FRANKLIN PARK, IL 60131	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	2,000
WTTW CHANNEL II 5400 N ST LOUIS AVE CHICAGO, IL 60625	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	1,000
Total ▶ 3a				1,002,179

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>				
YEAR UP223 W JACKSON BLVD CHICAGO, IL 60606	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	1,500
YEMBA INC1207 S SAWYER AVE CHICAGO, IL 60623	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	1,500
YOUNG CHICAGO AUTHORS 1180 N MILWAUKEE AVE CHICAGO, IL 60642	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	10,000
Total ▶ 3a				1,002,179

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>				
YOUNG LIFE634 S LOMBARD AVE OAK PARK, IL 60304	NONE	501(C)(3)	CHARITABLE CONTRIBUTION	3,000
Total ▶ 3a				1,002,179

TY 2018 Legal Fees Schedule**Name:** GOOD HEART WORK SMART FOUNDATION**EIN:** 20-5836042

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	6,080	0	0	0

TY 2018 Other Assets Schedule**Name:** GOOD HEART WORK SMART FOUNDATION**EIN:** 20-5836042**Other Assets Schedule**

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
COMMERCIAL SPACE FROM GREENLINE WHEELS	228,802	0	0
MAD HARVEY, LLC	0	2,100,000	2,100,000

TY 2018 Other Decreases Schedule

Name: GOOD HEART WORK SMART FOUNDATION
EIN: 20-5836042

Description	Amount
PRIOR PERIOD ADJUSTMENT	58,467

TY 2018 Other Expenses Schedule**Name:** GOOD HEART WORK SMART FOUNDATION**EIN:** 20-5836042**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
DUES AND SUBSCRIPTIONS	15	0	0	0
OTHER MISCELLANEOUS EXPENSES	1,618	0	0	0
PROPERTY TAXES	11,994	0	0	0
INSURANCE EXPENSE	4,001	0	0	0
UTILITIES	2,392	0	0	0
PROPERTY SALE	374,857	374,857	0	0
LOSS ON GREENLINE WHEELS, L3C	916,147	916,147	0	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 <u>www.irs.gov/Form990</u> for the latest information	OMB No 1545-0047 2018
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Name of the organization GOOD HEART WORK SMART FOUNDATION	Employer identification number 20-5836042
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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 GOOD HEART WORK SMART FOUNDATION	Employer identification number 20-5836042
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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	STEPHEN & MARY JO SCHULER 315 N EUCLID AVENUE OAK PARK, IL 60302	\$ 813,650	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
2	SERENITY INVESTMENTS LLC 1010 LAKE STREET SUITE 200 OAK PARK, IL 60301	\$ 2,112,921	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)

Name of organization GOOD HEART WORK SMART FOUNDATION	Employer identification number 20-5836042
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Part II	Noncash Property
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(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
2	HARVEY MADISON DEVELOPMENT, LLC	\$ 2,112,921	2018-12-27
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
_____	_____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
_____	_____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
_____	_____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
_____	_____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
_____	_____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
_____	_____	\$ _____	_____

Name of organization GOOD HEART WORK SMART FOUNDATION	Employer identification number 20-5836042
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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