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Form **990**

Department of the Treasury
Internal Revenue Service

Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

▶ Do not enter social security numbers on this form as it may be made public

▶ **Go to *www.irs.gov/Form990* for instructions and the latest information.**

OMB No 1545-0047

2018

Open to Public Inspection

A For the 2019 calendar year, or tax year beginning 01-01-2018 , and ending 12-31-2018

B Check if applicable
- ☐ Address change
- ☐ Name change
- ☐ Initial return
- ☐ Final return/terminated
- ☐ Amended return
- ☐ Application pending

C Name of organization
PHI dba Presbyterian Senior Living

Doing business as
Presbyterian Senior Living

Number and street (or P O box if mail is not delivered to street address) | Room/suite
One Trinity Drive East Suite 201

City or town, state or province, country, and ZIP or foreign postal code
Dillsburg, PA 170198522

D Employer identification number
23-1381404

E Telephone number
(717) 502-8840

G Gross receipts $ 21,683,468

F Name and address of principal officer
Stephen Proctor
One Trinity Drive East
Suite 201
Dillsburg, PA 17019

H(a) Is this a group return for subordinates? ☐ Yes ☑ No

H(b) Are all subordinates included? ☐ Yes ☐ No
If "No," attach a list (see instructions)

H(c) Group exemption number ▶ 3292

I Tax-exempt status ☑ 501(c)(3) ☐ 501(c) ( ) ◀ (insert no) ☐ 4947(a)(1) or ☐ 527

J Website: ▶ www presbyteriansenioriving org

K Form of organization ☑ Corporation ☐ Trust ☐ Association ☐ Other ▶

L Year of formation 1997

M State of legal domicile PA

Part I Summary

1 Briefly describe the organization's mission or most significant activities
Guided by the life and teachings of Jesus, the mission of Presbyterian Senior Living is to provide compassionate, vibrant and supportive communities and services to promote wholeness of body, mind and spirit

2 Check this box ▶ ☐ if the organization discontinued its operations or disposed of more than 25% of its net assets

3	Number of voting members of the governing body (Part VI, line 1a)	**3**	14
4	Number of independent voting members of the governing body (Part VI, line 1b)	**4**	14
5	Total number of individuals employed in calendar year 2018 (Part V, line 2a)	**5**	146
6	Total number of volunteers (estimate if necessary)	**6**	0
7a	Total unrelated business revenue from Part VIII, column (C), line 12	**7a**	287,240
b	Net unrelated business taxable income from Form 990-T, line 34	**7b**	0

		Prior Year	Current Year
8	Contributions and grants (Part VIII, line 1h)	288,909	473,150
9	Program service revenue (Part VIII, line 2g)	20,869,232	20,172,318
10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	925,020	1,037,480
11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	0	0
12	Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	22,083,161	21,682,948
13	Grants and similar amounts paid (Part IX, column (A), lines 1–3)	25,000	0
14	Benefits paid to or for members (Part IX, column (A), line 4)	0	0
15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)	14,317,710	13,743,902
16a	Professional fundraising fees (Part IX, column (A), line 11e)	0	0
b	Total fundraising expenses (Part IX, column (D), line 25) ▶721,822		
17	Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e)	8,295,674	8,401,628
18	Total expenses Add lines 13–17 (must equal Part IX, column (A), line 25)	22,638,384	22,145,530
19	Revenue less expenses Subtract line 18 from line 12	-555,223	-462,582

		Beginning of Current Year	End of Year
20	Total assets (Part X, line 16)	46,169,389	51,190,177
21	Total liabilities (Part X, line 26)	65,075,331	70,605,575
22	Net assets or fund balances Subtract line 21 from line 20	-18,905,942	-19,415,398

Part II Signature Block

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 officer) is based on all information of which preparer has any knowledge

Sign Here

Signature of officer — Date: 2019-11-15

Jeffrey Davis Senior Vice-President/CFO
Type or print name and title

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
Firm's name ▶			Firm's EIN ▶	
Firm's address ▶			Phone no	

May the IRS discuss this return with the preparer shown above? (see instructions) ☐ Yes ☐ No

Part III Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III . . . . . ☐

1 Briefly describe the organization's mission

Provide management support services for affiliates, which include nursing homes, assisted living facilities, continuing care retirement communities and low income housing facilities, allowing them to focus on quality of care for the residents These management services include intercompany loans and fundraising expenses for its subsidiaries (65 subsidiaries)

2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? . . . . . ☐ Yes ☑ No

If "Yes," describe these new services on Schedule O

3 Did the organization cease conducting, or make significant changes in how it conducts, any program services? . . . . . ☐ Yes ☑ No

If "Yes," describe these changes on Schedule O

4 Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported

4a (Code) (Expenses $ 21,012,939 including grants of $) (Revenue $ 20,892,558)

See Additional Data

4b (Code) (Expenses $ including grants of $) (Revenue $)

4c (Code) (Expenses $ including grants of $) (Revenue $)

4d Other program services (Describe in Schedule O)

(Expenses $ 0 including grants of $ 0) (Revenue $ 0)

4e **Total program service expenses** ▶ 21,012,939

Part IV Checklist of Required Schedules

			Yes	No
1	Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? *If "Yes," complete Schedule A*	1	Yes	
2	Is the organization required to complete *Schedule B, Schedule of Contributors* (see instructions)?	2	Yes	
3	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? *If "Yes," complete Schedule C, Part I*	3		No
4	**Section 501(c)(3) organizations.** Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? *If "Yes," complete Schedule C, Part II*	4		No
5	Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? *If "Yes," complete Schedule C, Part III*	5		No
6	Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? *If "Yes," complete Schedule D, Part I*	6		No
7	Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? *If "Yes," complete Schedule D, Part II*	7		No
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? *If "Yes," complete Schedule D, Part III*	8		No
9	Did the organization report an amount in Part X, line 21 for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X, or provide credit counseling, debt management, credit repair, or debt negotiation services? *If "Yes," complete Schedule D, Part IV*	9		No
10	Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? *If "Yes," complete Schedule D, Part V*	10		No
11	If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable			
a	Did the organization report an amount for land, buildings, and equipment in Part X, line 10? *If "Yes," complete Schedule D, Part VI*	11a	Yes	
b	Did the organization report an amount for investments—other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? *If "Yes," complete Schedule D, Part VII*	11b		No
c	Did the organization report an amount for investments—program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? *If "Yes," complete Schedule D, Part VIII*	11c		No
d	Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? *If "Yes," complete Schedule D, Part IX*	11d		No
e	Did the organization report an amount for other liabilities in Part X, line 25? *If "Yes," complete Schedule D, Part X*	11e	Yes	
f	Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? *If "Yes," complete Schedule D, Part X*	11f	Yes	
12a	Did the organization obtain separate, independent audited financial statements for the tax year? *If "Yes," complete Schedule D, Parts XI and XII*	12a		No
b	Was the organization included in consolidated, independent audited financial statements for the tax year? *If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional*	12b	Yes	
13	Is the organization a school described in section 170(b)(1)(A)(ii)? *If "Yes," complete Schedule E*	13		No
14a	Did the organization maintain an office, employees, or agents outside of the United States?	14a		No
b	Did the organization have aggregate revenues or expenses of more than $10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at $100,000 or more? *If "Yes," complete Schedule F, Parts I and IV*	14b		No
15	Did the organization report on Part IX, column (A), line 3, more than $5,000 of grants or other assistance to or for any foreign organization? *If "Yes," complete Schedule F, Parts II and IV*	15		No
16	Did the organization report on Part IX, column (A), line 3, more than $5,000 of aggregate grants or other assistance to or for foreign individuals? *If "Yes," complete Schedule F, Parts III and IV*	16		No
17	Did the organization report a total of more than $15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? *If "Yes," complete Schedule G, Part I* (see instructions)	17		No
18	Did the organization report more than $15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? *If "Yes," complete Schedule G, Part II*	18		No
19	Did the organization report more than $15,000 of gross income from gaming activities on Part VIII, line 9a? *If "Yes," complete Schedule G, Part III*	19		No
20a	Did the organization operate one or more hospital facilities? *If "Yes," complete Schedule H*	20a		No
b	If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?	20b		
21	Did the organization report more than $5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? *If "Yes," complete Schedule I, Parts I and II*	21		No
22	Did the organization report more than $5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? *If "Yes," complete Schedule I, Parts I and III*	22		No

Part IV Checklist of Required Schedules *(continued)*

			Yes	No
23	Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? *If "Yes," complete Schedule J*	**23**	Yes	
24a	Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than $100,000 as of the last day of the year, that was issued after December 31, 2002? *If "Yes," answer lines 24b through 24d and complete Schedule K If "No," go to line 25a*	**24a**		No
b	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	**24b**		
c	Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?	**24c**		
d	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	**24d**		
25a	**Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.** Did the organization engage in an excess benefit transaction with a disqualified person during the year? *If "Yes," complete Schedule L, Part I*	**25a**		No
b	Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? *If "Yes," complete Schedule L, Part I*	**25b**		No
26	Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? *If "Yes," complete Schedule L, Part II*	**26**		No
27	Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? *If "Yes," complete Schedule L, Part III*	**27**		No
28	Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions)			
a	A current or former officer, director, trustee, or key employee? *If "Yes," complete Schedule L, Part IV*	**28a**		No
b	A family member of a current or former officer, director, trustee, or key employee? *If "Yes," complete Schedule L, Part IV*	**28b**		No
c	An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? *If "Yes," complete Schedule L, Part IV*	**28c**	Yes	
29	Did the organization receive more than $25,000 in non-cash contributions? *If "Yes," complete Schedule M*	**29**		No
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? *If "Yes," complete Schedule M*	**30**		No
31	Did the organization liquidate, terminate, or dissolve and cease operations? *If "Yes," complete Schedule N, Part I*	**31**		No
32	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? *If "Yes," complete Schedule N, Part II*	**32**		No
33	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301 7701-2 and 301 7701-3? *If "Yes," complete Schedule R, Part I*	**33**	Yes	
34	Was the organization related to any tax-exempt or taxable entity? *If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1*	**34**	Yes	
35a	Did the organization have a controlled entity within the meaning of section 512(b)(13)?	**35a**	Yes	
b	If 'Yes' to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? *If "Yes," complete Schedule R, Part V, line 2*	**35b**	Yes	
36	**Section 501(c)(3) organizations.** Did the organization make any transfers to an exempt non-charitable related organization? *If "Yes," complete Schedule R, Part V, line 2*	**36**		No
37	Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? *If "Yes," complete Schedule R, Part VI*	**37**		No
38	Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? **Note.** All Form 990 filers are required to complete Schedule O	**38**	Yes	

Part V Statements Regarding Other IRS Filings and Tax Compliance

Check if Schedule O contains a response or note to any line in this Part V ☐

				Yes	No
1a	Enter the number reported in Box 3 of Form 1096 Enter -0- if not applicable	**1a**	0		
b	Enter the number of Forms W-2G included in line 1a *Enter -0-* if not applicable	**1b**	0		
c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?		**1c**	Yes	

2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return	**2a** 146			
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? **Note.** If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions)		**2b**	Yes	
3a	Did the organization have unrelated business gross income of $1,000 or more during the year? . . .		**3a**	Yes	
b	If "Yes," has it filed a Form 990-T for this year? *If "No" to line 3b, provide an explanation in Schedule O* . . .		**3b**	Yes	
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)? . .		**4a**		No
b	If "Yes," enter the name of the foreign country ▶ _____ See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR)				
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year? . .		**5a**		No
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		**5b**		No
c	If "Yes," to line 5a or 5b, did the organization file Form 8886-T?		**5c**		
6a	Does the organization have annual gross receipts that are normally greater than $100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions? . . .		**6a**		No
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		**6b**		
7	**Organizations that may receive deductible contributions under section 170(c).**				
a	Did the organization receive a payment in excess of $75 made partly as a contribution and partly for goods and services provided to the payor?		**7a**		
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?		**7b**		
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		**7c**		
d	If "Yes," indicate the number of Forms 8282 filed during the year	**7d**			
e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		**7e**		
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? . .		**7f**		
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?		**7g**		
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?		**7h**		
8	**Sponsoring organizations maintaining donor advised funds.** Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?		**8**		
9a	Did the sponsoring organization make any taxable distributions under section 4966? . . .		**9a**		
b	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person? . . .		**9b**		
10	**Section 501(c)(7) organizations.** Enter				
a	Initiation fees and capital contributions included on Part VIII, line 12 . . .	**10a**			
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	**10b**			
11	**Section 501(c)(12) organizations.** Enter				
a	Gross income from members or shareholders	**11a**			
b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them)	**11b**			
12a	**Section 4947(a)(1) non-exempt charitable trusts.** Is the organization filing Form 990 in lieu of Form 1041?		**12a**		
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year	**12b**			
13	**Section 501(c)(29) qualified nonprofit health insurance issuers.**				
a	Is the organization licensed to issue qualified health plans in more than one state? **Note.** See the instructions for additional information the organization must report on Schedule O		**13a**		
b	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans	**13b**			
c	Enter the amount of reserves on hand	**13c**			
14a	Did the organization receive any payments for indoor tanning services during the tax year?		**14a**		No
b	If "Yes," has it filed a Form 720 to report these payments? *If "No," provide an explanation in Schedule O* . .		**14b**		
15	Is the organization subject to the section 4960 tax on payment(s) of more than $1,000,000 in remuneration or excess parachute payment(s) during the year? If "Yes," see instructions and file Form 4720, Schedule N		**15**		No
16	Is the organization an educational institution subject to the section 4968 excise tax on net investment income? If "Yes," complete Form 4720, Schedule O		**16**		No

Part VI **Governance, Management, and Disclosure** *For each "Yes" response to lines 2 through 7b below, and for a "No" response to lines 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O See instructions*

Check if Schedule O contains a response or note to any line in this Part VI . . . . . ☑

Section A. Governing Body and Management

				Yes	No
1a	Enter the number of voting members of the governing body at the end of the tax year	**1a**	14		
	If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O				
b	Enter the number of voting members included in line 1a, above, who are independent	**1b**	14		
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?		**2**		No
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person?		**3**		No
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?		**4**		No
5	Did the organization become aware during the year of a significant diversion of the organization's assets?		**5**		No
6	Did the organization have members or stockholders?		**6**		No
7a	Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?		**7a**		No
b	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?		**7b**		No
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following				
a	The governing body?		**8a**	Yes	
b	Each committee with authority to act on behalf of the governing body?		**8b**	Yes	
9	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? *If "Yes," provide the names and addresses in Schedule O*		**9**		No

Section B. Policies (*This Section B requests information about policies not required by the Internal Revenue Code.*)

			Yes	No
10a	Did the organization have local chapters, branches, or affiliates?	**10a**	Yes	
b	If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?	**10b**	Yes	
11a	Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	**11a**	Yes	
b	Describe in Schedule O the process, if any, used by the organization to review this Form 990			
12a	Did the organization have a written conflict of interest policy? *If "No," go to line 13*	**12a**	Yes	
b	Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	**12b**	Yes	
c	Did the organization regularly and consistently monitor and enforce compliance with the policy? *If "Yes," describe in Schedule O how this was done*	**12c**	Yes	
13	Did the organization have a written whistleblower policy?	**13**	Yes	
14	Did the organization have a written document retention and destruction policy?	**14**	Yes	
15	Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?			
a	The organization's CEO, Executive Director, or top management official	**15a**	Yes	
b	Other officers or key employees of the organization	**15b**	Yes	
	If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions)			
16a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?	**16a**	Yes	
b	If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?	**16b**	Yes	

Section C. Disclosure

17 List the States with which a copy of this Form 990 is required to be filed▶ PA

18 Section 6104 requires an organization to make its Form 1023 (or 1024-A if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection Indicate how you made these available Check all that apply

☐ Own website ☐ Another's website ☑ Upon request ☐ Other (explain in Schedule O)

19 Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and financial statements available to the public during the tax year

20 State the name, address, and telephone number of the person who possesses the organization's books and records ▶Jeffrey J Davis One Trinity Drive East Suite 201 Dillsburg, PA 17019 (717) 502-8840

Part VII **Compensation of Officers, Directors,Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**

Check if Schedule O contains a response or note to any line in this Part VII . . . . . ☐

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

1a Complete this table for all persons required to be listed Report compensation for the calendar year ending with or within the organization's tax year

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation Enter -0- in columns (D), (E), and (F) if no compensation was paid
- List all of the organization's **current** key employees, if any See instructions for definition of "key employee "
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than $100,000 from the organization and any related organizations
- List all of the organization's **former** officers, key employees, or highest compensated employees who received more than $100,000 of reportable compensation from the organization and any related organizations
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than $10,000 of reportable compensation from the organization and any related organizations

List persons in the following order individual trustees or directors, institutional trustees, officers, key employees, highest compensated employees, and former such persons

☐ Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
See Additional Data Table										

Part VII **Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees** *(continued)*

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
See Additional Data Table										

1b Sub-Total ▶			
c Total from continuation sheets to Part VII, **Section A** ▶			
d Total (add lines 1b and 1c) ▶	3,592,501	0	256,538

2 Total number of individuals (including but not limited to those listed above) who received more than $100,000 of reportable compensation from the organization ▶ 41

			Yes	No
3	Did the organization list any **former** officer, director or trustee, key employee, or highest compensated employee on line 1a? *If "Yes," complete Schedule J for such individual*	**3**		No
4	For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than $150,000? *If "Yes," complete Schedule J for such individual*	**4**	Yes	
5	Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? *If "Yes," complete Schedule J for such person*	**5**		No

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than $100,000 of compensation from the organization Report compensation for the calendar year ending with or within the organization's tax year

(A) Name and business address	(B) Description of services	(C) Compensation

2 Total number of independent contractors (including but not limited to those listed above) who received more than $100,000 of compensation from the organization ▶ 0

Part VIII Statement of Revenue

Check if Schedule O contains a response or note to any line in this Part VIII . . . . . ☐

		(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512 - 514
Contributions, Gifts, Grants and Other Similar Amounts					
1a Federated campaigns	1a 0				
b Membership dues	1b 0				
c Fundraising events	1c 0				
d Related organizations	1d 0				
e Government grants (contributions)	1e 0				
f All other contributions, gifts, grants, and similar amounts not included above	1f 473,150				
g Noncash contributions included in lines 1a - 1f $ 100,000					
h **Total.** Add lines 1a-1f . . . . . ▶		473,150			
Program Service Revenue	Business Code				
2a Management Fee Income	561000	19,885,078	19,885,078	0	0
b Developer's Fee Income	531390	0	0	0	0
c Service Agreement Income	541200	287,240	0	287,240	0
d					
e					
f All other program service revenue		0	0	0	0
g **Total.** Add lines 2a–2f . . . . ▶		20,172,318			
3 Investment income (including dividends, interest, and other similar amounts) . . . . . ▶		1,038,000	1,038,000	0	0
4 Income from investment of tax-exempt bond proceeds ▶		0	0	0	0
5 Royalties . . . . . ▶		0	0	0	0
	(i) Real / (ii) Personal				
6a Gross rents	0 / 0				
b Less rental expenses	0 / 0				
c Rental income or (loss)	0 / 0				
d Net rental income or (loss) . . . . . ▶		0	0	0	0
	(i) Securities / (ii) Other				
7a Gross amount from sales of assets other than inventory	0 / 0				
b Less cost or other basis and sales expenses	0 / 520				
c Gain or (loss)	0 / -520				
d Net gain or (loss) . . . . . ▶		-520	-520	0	0
8a Gross income from fundraising events (not including $ 0 of contributions reported on line 1c) See Part IV, line 18 . . . . a	0				
b Less direct expenses . . . b	0				
c Net income or (loss) from fundraising events . . ▶		0	0	0	0
9a Gross income from gaming activities See Part IV, line 19 . . . a	0				
b Less direct expenses . . . b	0				
c Net income or (loss) from gaming activities . . ▶		0	0	0	0
10a Gross sales of inventory, less returns and allowances . . a	0				
b Less cost of goods sold . . b	0				
c Net income or (loss) from sales of inventory . . ▶		0	0	0	0
Other Revenue Miscellaneous Revenue	Business Code				
11a					
b					
c					
d All other revenue					
e **Total.** Add lines 11a–11d . . . . . ▶		0			
12 **Total revenue.** See Instructions . . . . . ▶		21,682,948	20,922,558	287,240	0

Part IX Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns All other organizations must complete column (A)

Check if Schedule O contains a response or note to any line in this Part IX . . . . . ☐

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraisingexpenses
1 Grants and other assistance to domestic organizations and domestic governments See Part IV, line 21	0	0		
2 Grants and other assistance to domestic individuals See Part IV, line 22	0	0		
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals See Part IV, line 15 and 16	0	0		
4 Benefits paid to or for members	0	0		
5 Compensation of current officers, directors, trustees, and key employees	3,531,945	3,358,663	65,856	107,426
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)	0	0	0	0
7 Other salaries and wages	8,097,879	7,537,285	147,790	412,804
8 Pension plan accruals and contributions (include section 401 (k) and 403(b) employer contributions)	0	0	0	0
9 Other employee benefits	1,336,480	1,304,229	25,573	6,678
10 Payroll taxes	777,598	736,843	14,448	26,307
11 Fees for services (non-employees)				
a Management	0	0	0	0
b Legal	683,687	670,539	13,148	0
c Accounting	198,879	195,055	3,824	0
d Lobbying	0	0	0	0
e Professional fundraising services See Part IV, line 17	0			0
f Investment management fees	0	0	0	0
g Other (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O)	1,686,616	1,648,425	32,322	5,869
12 Advertising and promotion	56,908	14,774	0	42,134
13 Office expenses	1,334,684	1,252,880	24,566	57,238
14 Information technology	2,065,698	2,025,973	39,725	0
15 Royalties	0	0	0	0
16 Occupancy	922,485	895,809	17,565	9,111
17 Travel	425,447	368,651	7,228	49,568
18 Payments of travel or entertainment expenses for any federal, state, or local public officials	0	0	0	0
19 Conferences, conventions, and meetings	64,261	59,055	1,158	4,048
20 Interest	387,191	379,479	7,441	271
21 Payments to affiliates	0	0	0	0
22 Depreciation, depletion, and amortization	426,757	418,258	8,201	298
23 Insurance	100,119	98,125	1,924	70
24 Other expenses Itemize expenses not covered above (List miscellaneous expenses in line 24e If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O)				
a Contribution Expense	48,896	48,896	0	0
b				
c				
d				
e All other expenses				
25 **Total functional expenses.** Add lines 1 through 24e	22,145,530	21,012,939	410,769	721,822
26 **Joint costs.** Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation Check here ▶ ☐ if following SOP 98-2 (ASC 958-720)				

Part X Balance Sheet

Check if Schedule O contains a response or note to any line in this Part IX . . . . . ☐

				(A) Beginning of year		(B) End of year
Assets	1	Cash–non-interest-bearing		400	1	400
	2	Savings and temporary cash investments		12,860	2	1,245
	3	Pledges and grants receivable, net		0	3	49,200
	4	Accounts receivable, net		1,858	4	0
	5	Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees Complete Part II of Schedule L		0	5	0
	6	Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions) Complete Part II of Schedule L		0	6	0
	7	Notes and loans receivable, net		42,002,507	7	46,436,161
	8	Inventories for sale or use		0	8	0
	9	Prepaid expenses and deferred charges		338,537	9	413,150
	10a	Land, buildings, and equipment cost or other basis Complete Part VI of Schedule D	10a 7,977,687			
	b	Less accumulated depreciation	10b 4,979,515	2,764,639	10c	2,998,172
	11	Investments—publicly traded securities		756,790	11	1,111,849
	12	Investments—other securities See Part IV, line 11			12	
	13	Investments—program-related See Part IV, line 11			13	
	14	Intangible assets			14	
	15	Other assets See Part IV, line 11		291,798	15	180,000
	16	**Total assets.** Add lines 1 through 15 (must equal line 34)		46,169,389	16	51,190,177
Liabilities	17	Accounts payable and accrued expenses		2,124,328	17	2,512,177
	18	Grants payable		0	18	0
	19	Deferred revenue		90,000	19	0
	20	Tax-exempt bond liabilities		0	20	0
	21	Escrow or custodial account liability Complete Part IV of Schedule D		0	21	0
	22	Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons Complete Part II of Schedule L		0	22	0
	23	Secured mortgages and notes payable to unrelated third parties		5,000,000	23	5,000,000
	24	Unsecured notes and loans payable to unrelated third parties		2,543,833	24	4,772,612
	25	Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17 - 24) Complete Part X of Schedule D		55,317,170	25	58,320,786
	26	**Total liabilities.** Add lines 17 through 25		65,075,331	26	70,605,575
Net Assets or Fund Balances		**Organizations that follow SFAS 117 (ASC 958), check here ▶ ☑ and complete lines 27 through 29, and lines 33 and 34.**				
	27	Unrestricted net assets		-19,245,403	27	-19,899,419
	28	Temporarily restricted net assets		47,663	28	129,436
	29	Permanently restricted net assets		291,798	29	354,585
		Organizations that do not follow SFAS 117 (ASC 958), check here ▶ ☐ and complete lines 30 through 34.				
	30	Capital stock or trust principal, or current funds			30	
	31	Paid-in or capital surplus, or land, building or equipment fund			31	
	32	Retained earnings, endowment, accumulated income, or other funds			32	
	33	Total net assets or fund balances		-18,905,942	33	-19,415,398
	34	Total liabilities and net assets/fund balances		46,169,389	34	51,190,177

Part XI Reconcilliation of Net Assets

Check if Schedule O contains a response or note to any line in this Part XI . . . . . ☑

1	Total revenue (must equal Part VIII, column (A), line 12)	1	21,682,948
2	Total expenses (must equal Part IX, column (A), line 25)	2	22,145,530
3	Revenue less expenses Subtract line 2 from line 1	3	-462,582
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	-18,905,942
5	Net unrealized gains (losses) on investments	5	314,476
6	Donated services and use of facilities	6	0
7	Investment expenses	7	0
8	Prior period adjustments	8	0
9	Other changes in net assets or fund balances (explain in Schedule O)	9	-361,350
10	Net assets or fund balances at end of year Combine lines 3 through 9 (must equal Part X, line 33, column (B))	10	-19,415,398

Part XII Financial Statements and Reporting

Check if Schedule O contains a response or note to any line in this Part XII . . . . . ☐

			Yes	No
1	Accounting method used to prepare the Form 990 ☐ Cash ☑ Accrual ☐ Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O			
2a	Were the organization's financial statements compiled or reviewed by an independent accountant?	2a		No
	If 'Yes,' check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both ☐ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis			
b	Were the organization's financial statements audited by an independent accountant?	2b	Yes	
	If 'Yes,' check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both ☐ Separate basis ☑ Consolidated basis ☐ Both consolidated and separate basis			
c	If "Yes," to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?	2c	Yes	
	If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O			
3a	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?	3a		No
b	If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits	3b		

Additional Data

Software ID: 18007995
Software Version: v1.00
EIN: 23-1381404
Name: PHI dba Presbyterian Senior Living

Form 990 (2018)

Form 990, Part III, Line 4a:

The organization considers its primary program to be general and administrative in nature PHI d b a Presbyterian Senior Living provides management support services for nursing homes, assisted living facilities, continuing care retirement communities, and low income housing facilities These management services include fundraising for the subsidiaries

Form 990, Part VII - Compensation of Officers, Directors,Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W- 2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
Thomas Beaver III PSL & Long Board Member	1 4	X						0	0	0
Thomas Paisley PSL Chair	1 4	X		X				0	0	0
Charles Alexander PSL Board Member	1 4	X						0	0	0
Anne Drennan PSL Board Member & PIMS Vice Chair	1 4	X		X				0	0	0
John Fargnoli PSL, Hsg Mgmt, PSL Svc, PIMS Mbr	1 4	X						0	0	0
Ann Fedorchak PSL & PSL Hsg Mgmt Board Member, PSL Svcs Vice Chair	1 4	X		X				0	0	0
George Glen PSL, Hsg Mgmt, PSL Svc, Quincy Vlg Board Mbr	1 4	X						0	0	0
Alf Halvorson PSL Board Member	1 4	X						0	0	0
Sharon Kelly PSL Hsg Mgmt & PSL Svc Board Member, PSL Vice Chair	1 4	X		X				0	0	0
Philip Miller PHPH, PSL Svcs, PSL Hsg Mgmt Board Mbr	1 4	X						0	0	0

Form 990, Part VII - Compensation of Officers, Directors,Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W- 2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
Carol Parham PSL Board Member	1 4	X						0	0	0
Susan Reimann PSL Board Member	1 4	X						0	0	0
William Scott Cathedral Village Secretary	0 1	X		X				0	0	0
Robyn Stone PSL Board Member	1 4	X						0	0	0
Robert Hormell PSL Svc Chair, PSL Hsg Mgmt, Pres Homes in the Pres Huntingdon, Cathedral Village & PIMS Board Mbr	0 1	X		X				0	0	0
David Wolff PIMS Board Member	0 1	X						0	0	0
Paul Post Pres Homes in the Pres of Huntingdon Chair	0 1	X		X				0	0	0
Betty Anne Cherry Pres Homes in the Pres of Huntingdon Board Mbr	0 1	X						0	0	0
John D Killian Pres Homes in the Pres of Huntingdon Board Mbr	0 1	X						0	0	0
Joann Kimmel Pres Homes in the Pres of Huntingdon Board Mbr	0 1	X						0	0	0

Form 990, Part VII - Compensation of Officers, Directors,Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W- 2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
James Vreeland Pres Homes in the Pres of Huntingdon Board Mbr	0 1	X						0	0	0
William Moyer PHI Investment Mgmt Services Inc Board Mbr	0 1	X						0	0	0
William Parham Jr PIMS, PSL Hsg Mgmt & PSL Svc Board Mbr	0 1	X						0	0	0
Allison Kohler Quincy Village Board of Directors Chair	0 1	X		X				0	0	0
Kimberly Shockey Quincy Village Board of Directors Vice Chair	0 1	X		X				0	0	0
Timothy Baer Quincy Village Board of Directors Board Member	0 1	X						0	0	0
Greg Myers Quincy Village Board of Directors Board Member	0 1	X						0	0	0
Richard Pelletier Quincy Village Board of Directors Board Member	0 1	X						0	0	0
Clifton Rau Quincy Village Board of Directors Board Member	0 1	X						0	0	0
Kathryn Sandifer Quincy Village Board of Directors Board Member	0 1	X						0	0	0

Form 990, Part VII - Compensation of Officers, Directors,Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W- 2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
Rodger Savage Quincy Village Board of Directors Board Member	0 1	X						0	0	0
Jeffrey Goss Long Community Chair	0 1	X		X				0	0	0
Gary Martin Long Community Vice Chair	0 1	X		X				0	0	0
N Anthony Mastropietro Long Community Board Member	0 1	X						0	0	0
J Michael Melbert Long Community Board Member	0 1	X						0	0	0
William Cobb Jr Cathedral Village Board Member	0 1	X						0	0	0
Richard Hartmann Cathedral Village Board Member	0 1	X						0	0	0
Edwin Sheffield Cathedral Village Board Assistant Secretary	0 1	X		X				0	0	0
Karl Fritton Cathedral Village Board Chair	0 1	X		X				0	0	0
Judith Borie Cathedral Village Board Member	0 1	X						0	0	0

Form 990, Part VII - Compensation of Officers, Directors,Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W- 2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
John A Bower Jr Cathedral Village Board Member	0 1	X						0	0	0
Elizabeth Gemmill Cathedral Village Board Member	0 1	X						0	0	0
Richard Schaphorst Cathedral Village Board Member	0 1	X						0	0	0
Nancy Pegues Presbyterian Senior Living Svc Inc Board Mbr	0 1	X						0	0	0
George Alt Shepherds in Monroe County Board Chair	0 1	X		X				0	0	0
Patricia Barber Shepherds in Monroe County Board Member	0 1	X						0	0	0
Janet Goldberg Shepherds in Monroe County Board Member	0 1	X						0	0	0
Carol Mortimer Shepherds in Monroe County Board Member	0 1	X						0	0	0
Mike Reisenwitz Shepherds in Monroe County Board Member	0 1	X						0	0	0
Jennifer Shropshire PSL Board of Trustee Board Member & Cathedral Village Board Vice Chair	0 1	X		X				0	0	0

Form 990, Part VII - Compensation of Officers, Directors,Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W- 2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
Lawrence Chottiner Long Community Board Member	0 1	X						0	0	0
Paul Gordon Long Community Board Member	0 1	X						0	0	0
Stephen Huston Pres Homes in the Pres Huntingdon Board Mbr	0 1	X						0	0	0
Daniel Nelson Pres Homes in thr Pres of Huntingdon Board Vice Chair	0 1	X		X				0	0	0
Philip Miller PIMS Chair	0 1	X		X				0	0	0
Cherie Carl Quincy Village Board Member	0 1	X						0	0	0
Cheryl Rhodes Quincy Village Board Member	0 1	X						0	0	0
Beverly Shockey Quincy Village Board Member	0 1	X						0	0	0
Stephen Proctor Board President & Chief Executive Officer	0 40	X		X	X			451,618	0	69,031
Terry Goldstein PSL Board Member	1 4	X						0	0	0

Form 990, Part VII - Compensation of Officers, Directors,Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W- 2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
Chad Kramer Long Community Board Member	0 1	X						0	0	0
James Huff Pres Homes in the Pres of Huntingdon Board Member	0 1	X						0	0	0
Susan McCarter Pres Homes in the Pres of Huntingdon & Cathedral Village Board Member	0 1	X						0	0	0
Jeffrey J Davis Board Treasurer & Senior VP and Chief Financial Officer	0 40			X	X			299,138	0	14,901
MaryAnne Adamczyk Board Assistant Secretary & Sr VP Corp Relations	0 40			X	X			199,753	0	14,461
Nancy Deibler Board Secretary & Executive Administrative Assistant	0 40			X				60,558	0	6,382
James Bernardo Board Vice Chair & Executive Vice President	0 40			X	X			312,085	0	14,901
Dyan McAlister Board Assistant Treasurer & VP of Finance	0 40			X	X			156,485	0	16,902
Dan Davis Jr Senior VP of Operations-Continuing Care Comm	0 40				X			228,657	0	17,130
Victoria Hess VP Of Sales and Marketing	0 40				X			190,747	0	1,653

Form 990, Part VII - Compensation of Officers, Directors,Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(D) Reportable compensation from the organization (W- 2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
Diane Burfiendt VP of Ops-Aff Housing and Pop Hlth	0 40				X			182,917	0	17,158
Teresa Buchman VP Extended Care Operations	0 40				X			168,186	0	1,764
Cynthia Fox VP Human Resources	0 40				X			149,058	0	14,338
Steven Fuller VP Medical Director	0 40				X			224,571	0	7,570
Robert Jones VP of Plant Operations & Assets	0 40				X			142,881	0	16,306
Mary Ann Poling Executive Director	0 40					X		159,210	0	6,911
Deborah Barefoot Regional Director of Operations	0 40					X		180,678	0	7,078
Catherine Chan Ng Executive Director	0 40					X		162,623	0	16,001
Samantha Roos Meiser Executive Director	0 40					X		169,094	0	12,631
Debra Larkin Corp Director of Comp & Privacy	0 40					X		154,242	0	1,420

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SCHEDULE A (Form 990 or 990EZ)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

▶ **Attach to Form 990 or Form 990-EZ.**

▶ **Go to *www.irs.gov/Form990* for the latest information.**

OMB No 1545-0047

2018

Open to Public Inspection

Name of the organization
PHI dba Presbyterian Senior Living

Employer identification number
23-1381404

Part I Reason for Public Charity Status (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is (For lines 1 through 12, check only one box)

1 ☐ A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**

2 ☐ A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E (Form 990 or 990-EZ))

3 ☐ A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**

4 ☐ A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state _____

5 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170 (b)(1)(A)(iv).** (Complete Part II)

6 ☐ A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**

7 ☐ An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi).** (Complete Part II)

8 ☐ A community trust described in **section 170(b)(1)(A)(vi)** (Complete Part II)

9 ☐ An agricultural research organization described in **170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land grant college of agriculture See instructions Enter the name, city, and state of the college or university _____

10 ☑ An organization that normally receives (1) more than 331/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions—subject to certain exceptions, and (2) no more than 331/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975 See **section 509(a)(2).** (Complete Part III)

11 ☐ An organization organized and operated exclusively to test for public safety See **section 509(a)(4).**

12 ☐ An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in **section 509(a)(1)** or **section 509(a)(2).** See **section 509(a)(3).** Check the box in lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g

a ☐ **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization **You must complete Part IV, Sections A and B.**

b ☐ **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s) **You must complete Part IV, Sections A and C.**

c ☐ **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions) **You must complete Part IV, Sections A, D, and E.**

d ☐ **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions) **You must complete Part IV, Sections A and D, and Part V.**

e ☐ Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization

f Enter the number of supported organizations _____

g Provide the following information about the supported organization(s)

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1- 10 above (see instructions))	(iv) Is the organization listed in your governing document? Yes	(iv) No	(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
Total						

Part II **Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv), 170(b)(1)(A)(vi), and 170 (b)(1)(A)(ix)**

(Complete only if you checked the box on line 5, 7, 8, or 9 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2014	(b) 2015	(c) 2016	(d) 2017	(e) 2018	(f) Total
1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grant ")						
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 **Total.** Add lines 1 through 3						
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						
6 **Public support.** Subtract line 5 from line 4						

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a)2014	(b)2015	(c)2016	(d)2017	(e)2018	(f)Total
7 Amounts from line 4						
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income Do not include gain or loss from the sale of capital assets (Explain in Part VI)						
11 **Total support.** Add lines 7 through 10						

12 Gross receipts from related activities, etc (see instructions) **12**

13 **First five years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** . . . . . ▶ ☐

Section C. Computation of Public Support Percentage

14 Public support percentage for 2018 (line 6, column (f) divided by line 11, column (f)) **14**

15 Public support percentage for 2017 Schedule A, Part II, line 14 **15**

16a **33 1/3% support test—2018.** If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization ▶ ☐

b **33 1/3% support test—2017.** If the organization did not check a box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and **stop here.** The organization qualifies as a publicly supported organization ▶ ☐

17a **10%-facts-and-circumstances test—2018.** If the organization did not check a box on line 13, 16a, or 16b, and line 14 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and **stop here.** Explain in Part VI how the organization meets the "facts-and-circumstances" test The organization qualifies as a publicly supported organization ▶ ☐

b **10%-facts-and-circumstances test—2017.** If the organization did not check a box on line 13, 16a, 16b, or 17a, and line 15 is 10% or more, and if the organization meets the "facts-and-circumstances" test, check this box and **stop here.** Explain in Part VI how the organization meets the "facts-and-circumstances" test The organization qualifies as a publicly supported organization ▶ ☐

18 **Private foundation.** If the organization did not check a box on line 13, 16a, 16b, 17a, or 17b, check this box and see instructions ▶ ☐

Part III **Support Schedule for Organizations Described in Section 509(a)(2)**
(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support

Calendar year (or fiscal year beginning in) ▶	(a) 2014	(b) 2015	(c) 2016	(d) 2017	(e) 2018	(f) Total
1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants ")	444,655	332,079	178,234	288,909	473,150	1,717,027
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose	17,904,799	19,078,618	20,030,416	20,869,232	19,855,078	97,738,143
3 Gross receipts from activities that are not an unrelated trade or business under section 513	0	0	0	0	0	0
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf	0	0	0	0	0	0
5 The value of services or facilities furnished by a governmental unit to the organization without charge	0	0	0	0	0	0
6 **Total.** Add lines 1 through 5	18,349,454	19,410,697	20,208,650	21,158,141	20,328,228	99,455,170
7a Amounts included on lines 1, 2, and 3 received from disqualified persons	0	0	26,228	34,963	0	61,191
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of $5,000 or 1% of the amount on line 13 for the year	0	0	0	0	0	0
c Add lines 7a and 7b	0	0	26,228	34,963	0	61,191
8 **Public support.** (Subtract line 7c from line 6)						99,393,979

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a) 2014	(b) 2015	(c) 2016	(d) 2017	(e) 2018	(f) Total
9 Amounts from line 6	18,349,454	19,410,697	20,208,650	21,158,141	20,328,228	99,455,170
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	529,784	677,145	729,611	925,020	1,038,000	3,899,560
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975	0	0	0	0	0	0
c Add lines 10a and 10b	529,784	677,145	729,611	925,020	1,038,000	3,899,560
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on	0	0	0	0	0	0
12 Other income Do not include gain or loss from the sale of capital assets (Explain in Part VI)	0	0	0	0	0	0
13 **Total support.** (Add lines 9, 10c, 11, and 12)	18,879,238	20,087,842	20,938,261	22,083,161	21,366,228	103,354,730

14 **First five years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** ▶ ☐

Section C. Computation of Public Support Percentage

15	Public support percentage for 2018 (line 8, column (f) divided by line 13, column (f))	15	96 168 %
16	Public support percentage from 2017 Schedule A, Part III, line 15	16	96 357 %

Section D. Computation of Investment Income Percentage

17	Investment income percentage for **2018** (line 10c, column (f) divided by line 13, column (f))	17	3 773 %
18	Investment income percentage from **2017** Schedule A, Part III, line 17	18	3 583 %

19a **33 1/3% support tests—2018.** If the organization did not check the box on line 14, and line 15 is more than 33 1/3%, and line 17 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization ▶ ☑

b **33 1/3% support tests—2017.** If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3% and line 18 is not more than 33 1/3%, check this box and **stop here.** The organization qualifies as a publicly supported organization ▶ ☐

20 **Private foundation.** If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions ▶ ☐

Part IV Supporting Organizations

(Complete only if you checked a box on line 12 of Part I If you checked 12a of Part I, complete Sections A and B If you checked 12b of Part I, complete Sections A and C If you checked 12c of Part I, complete Sections A, D, and E If you checked 12d of Part I, complete Sections A and D, and complete Part V)

Section A. All Supporting Organizations

			Yes	No
1	Are all of the organization's supported organizations listed by name in the organization's governing documents? *If "No," describe in* ***Part VI*** *how the supported organizations are designated If designated by class or purpose, describe the designation If historic and continuing relationship, explain*	1		
2	Did the organization have any supported organization that does not have an IRS determination of status under section 509 (a)(1) or (2)? *If "Yes," explain in* ***Part VI*** *how the organization determined that the supported organization was described in section 509(a)(1) or (2)*	2		
3a	Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? *If "Yes," answer (b) and (c) below*	3a		
b	Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? *If "Yes," describe in* ***Part VI*** *when and how the organization made the determination*	3b		
c	Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? *If "Yes," explain in* ***Part VI*** *what controls the organization put in place to ensure such use*	3c		
4a	Was any supported organization not organized in the United States ("foreign supported organization")? *If "Yes" and if you checked 12a or 12b in Part I, answer (b) and (c) below*	4a		
b	Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? *If "Yes," describe in* ***Part VI*** *how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations*	4b		
c	Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? *If "Yes," explain in* ***Part VI*** *what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes*	4c		
5a	Did the organization add, substitute, or remove any supported organizations during the tax year? *If "Yes," answer (b) and (c) below (if applicable) Also, provide detail in* ***Part VI,*** *including (i) the names and EIN numbers of the supported organizations added, substituted, or removed, (ii) the reasons for each such action, (iii) the authority under the organization's organizing document authorizing such action, and (iv) how the action was accomplished (such as by amendment to the organizing document)*	5a		
b	**Type I or Type II only.** Was any added or substituted supported organization part of a class already designated in the organization's organizing document?	5b		
c	**Substitutions only.** Was the substitution the result of an event beyond the organization's control?	5c		
6	Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? *If "Yes," provide detail in* ***Part VI.***	6		
7	Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? *If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ)*	7		
8	Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? *If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ)*	8		
9a	Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? *If "Yes," provide detail in* ***Part VI.***	9a		
b	Did one or more disqualified persons (as defined in line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? *If "Yes," provide detail in* ***Part VI.***	9b		
c	Did a disqualified person (as defined in line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? *If "Yes," provide detail in* ***Part VI.***	9c		
10a	Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? *If "Yes," answer line 10b below*	10a		
b	Did the organization have any excess business holdings in the tax year? *(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings)*	10b		

Part IV Supporting Organizations (continued)

			Yes	No
11	Has the organization accepted a gift or contribution from any of the following persons?			
a	A person who directly or indirectly controls, either alone or together with persons described in (b) and (c) below, the governing body of a supported organization?	11a		
b	A family member of a person described in (a) above?	11b		
c	A 35% controlled entity of a person described in (a) or (b) above? *If "Yes" to a, b, or c, provide detail in Part VI*	11c		

Section B. Type I Supporting Organizations

			Yes	No
1	Did the directors, trustees, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the tax year? *If "No," describe in* ***Part VI*** *how the supported organization(s) effectively operated, supervised, or controlled the organization's activities If the organization had more than one supported organization, describe how the powers to appoint and/or remove directors or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year*	1		
2	Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? *If "Yes," explain in* ***Part VI*** *how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised or controlled the supporting organization*	2		

Section C. Type II Supporting Organizations

			Yes	No
1	Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? *If "No," describe in* ***Part VI*** *how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s)*	1		

Section D. All Type III Supporting Organizations

			Yes	No
1	Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?	1		
2	Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization (s) or (ii) serving on the governing body of a supported organization? *If "No," explain in* ***Part VI*** *how the organization maintained a close and continuous working relationship with the supported organization(s)*	2		
3	By reason of the relationship described in (2), did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? *If "Yes," describe in* ***Part VI*** *the role the organization's supported organizations played in this regard*	3		

Section E. Type III Functionally-Integrated Supporting Organizations

1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year **(see instructions)**

- **a** ☐ The organization satisfied the Activities Test Complete **line 2** below
- **b** ☐ The organization is the parent of each of its supported organizations Complete **line 3** below
- **c** ☐ The organization supported a governmental entity Describe in **Part VI** how you supported a government entity (see instructions)

			Yes	No
2	Activities Test **Answer (a) and (b) below.**			
a	Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? *If "Yes," then in* ***Part VI identify those supported organizations and explain*** *how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities*	2a		
b	Did the activities described in (a) constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? *If "Yes," explain in* ***Part VI*** *the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement*	2b		
3	Parent of Supported Organizations **Answer (a) and (b) below.**			
a	Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? *Provide details in* ***Part VI.***	3a		
b	Did the organization exercise a substantial degree of direction over the policies, programs and activities of each of its supported organizations? *If "Yes," describe in* ***Part VI.*** *the role played by the organization in this regard*	3b		

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations

1 ☐ Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov 20, 1970 (explain in Part VI) **See instructions.** All other Type III non-functionally integrated supporting organizations must complete Sections A through E

	Section A - Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain	1		
2	Recoveries of prior-year distributions	2		
3	Other gross income (see instructions)	3		
4	Add lines 1 through 3	4		
5	Depreciation and depletion	5		
6	Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6		
7	Other expenses (see instructions)	7		
8	**Adjusted Net Income** (subtract lines 5, 6 and 7 from line 4)	8		

	Section B - Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year)	1		
a	Average monthly value of securities	1a		
b	Average monthly cash balances	1b		
c	Fair market value of other non-exempt-use assets	1c		
d	**Total** (add lines 1a, 1b, and 1c)	1d		
e	**Discount** claimed for blockage or other factors (explain in detail in Part VI)			
2	Acquisition indebtedness applicable to non-exempt use assets	2		
3	Subtract line 2 from line 1d	3		
4	Cash deemed held for exempt use Enter 1-1/2% of line 3 (for greater amount, see instructions)	4		
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	5		
6	Multiply line 5 by 035	6		
7	Recoveries of prior-year distributions	7		
8	**Minimum Asset Amount** (add line 7 to line 6)	8		

	Section C - Distributable Amount			Current Year
1	Adjusted net income for prior year (from Section A, line 8, Column A)	1		
2	Enter 85% of line 1	2		
3	Minimum asset amount for prior year (from Section B, line 8, Column A)	3		
4	Enter greater of line 2 or line 3	4		
5	Income tax imposed in prior year	5		
6	**Distributable Amount.** Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions)	6		

7 ☐ Check here if the current year is the organization's first as a non-functionally-integrated Type III supporting organization (see instructions)

Part V **Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued)**

Section D - Distributions	**Current Year**
1 Amounts paid to supported organizations to accomplish exempt purposes	
2 Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	
3 Administrative expenses paid to accomplish exempt purposes of supported organizations	
4 Amounts paid to acquire exempt-use assets	
5 Qualified set-aside amounts (prior IRS approval required)	
6 Other distributions (describe in **Part VI**) See instructions	
7 **Total annual distributions.** Add lines 1 through 6	
8 Distributions to attentive supported organizations to which the organization is responsive (provide details in **Part VI**) See instructions	
9 Distributable amount for 2018 from Section C, line 6	
10 Line 8 amount divided by Line 9 amount	

Section E - Distribution Allocations (see instructions)	**(i) Excess Distributions**	**(ii) Underdistributions Pre-2018**	**(iii) Distributable Amount for 2018**
1 Distributable amount for 2018 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2018 (reasonable cause required-- explain in Part VI) See instructions			
3 Excess distributions carryover, if any, to 2018			
a From 2013.			
b From 2014.			
c From 2015.			
d From 2016.			
e From 2017.			
f **Total** of lines 3a through e			
g Applied to underdistributions of prior years			
h Applied to 2018 distributable amount			
i Carryover from 2013 not applied (see instructions)			
j Remainder Subtract lines 3g, 3h, and 3i from 3f			
4 Distributions for 2018 from Section D, line 7 $			
a Applied to underdistributions of prior years			
b Applied to 2018 distributable amount			
c Remainder Subtract lines 4a and 4b from 4			
5 Remaining underdistributions for years prior to 2018, if any Subtract lines 3g and 4a from line 2 If the amount is greater than zero, explain in Part VI See instructions			
6 Remaining underdistributions for 2018 Subtract lines 3h and 4b from line 1 If the amount is greater than zero, explain in Part VI See instructions			
7 **Excess distributions carryover to 2019.** Add lines 3j and 4c			
8 Breakdown of line 7			
a Excess from 2014.			
b Excess from 2015.			
c Excess from 2016.			
d Excess from 2017.			
e Excess from 2018.			

Part VI **Supplemental Information.** Provide the explanations required by Part II, line 10, Part II, line 17a or 17b, Part III, line 12, Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c, Part IV, Section B, lines 1 and 2, Part IV, Section C, line 1, Part IV, Section D, lines 2 and 3, Part IV, Section E, lines 1c, 2a, 2b, 3a and 3b, Part V, line 1, Part V, Section B, line 1e, Part V Section D, lines 5, 6, and 8, and Part V, Section E, lines 2, 5, and 6 Also complete this part for any additional information (See instructions)

Facts And Circumstances Test

990 Schedule A, Supplemental Information

Return Reference	Explanation
Schedule A, Part III, Line 12	Loss on sale of vehicle

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SCHEDULE D (Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

▶ Complete if the organization answered "Yes," on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.
▶ Attach to Form 990.
▶ Go to *www.irs.gov/Form990* for the latest information.

OMB No 1545-0047

2018

Open to Public Inspection

Name of the organization
PHI dba Presbyterian Senior Living

Employer identification number
23-1381404

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.

Complete if the organization answered "Yes" on Form 990, Part IV, line 6.

		(a) Donor advised funds	(b) Funds and other accounts
1	Total number at end of year		
2	Aggregate value of contributions to (during year)		
3	Aggregate value of grants from (during year)		
4	Aggregate value at end of year		

5 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? ☐ Yes ☐ No

6 Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? ☐ Yes ☐ No

Part II Conservation Easements. Complete if the organization answered "Yes" on Form 990, Part IV, line 7.

1 Purpose(s) of conservation easements held by the organization (check all that apply)

☐ Preservation of land for public use (e g , recreation or education)
☐ Preservation of an historically important land area
☐ Protection of natural habitat
☐ Preservation of a certified historic structure
☐ Preservation of open space

2 Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year

		Held at the End of the Year
a	Total number of conservation easements	2a
b	Total acreage restricted by conservation easements	2b
c	Number of conservation easements on a certified historic structure included in (a)	2c
d	Number of conservation easements included in (c) acquired after 7/25/06, and not on a historic structure listed in the National Register	2d

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year ▶ _____

4 Number of states where property subject to conservation easement is located ▶ _____

5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds? ☐ Yes ☐ No

6 Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ _____

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year ▶ $ _____

8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and section 170(h)(4)(B)(ii)? ☐ Yes ☐ No

9 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets.

Complete if the organization answered "Yes" on Form 990, Part IV, line 8.

1a If the organization elected, as permitted under SFAS 116 (ASC 958), not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIII, the text of the footnote to its financial statements that describes these items

b If the organization elected, as permitted under SFAS 116 (ASC 958), to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items

(i) Revenue included on Form 990, Part VIII, line 1 ▶ $ _____

(ii) Assets included in Form 990, Part X ▶ $ _____

2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 (ASC 958) relating to these items

a Revenue included on Form 990, Part VIII, line 1 ▶ $ _____

b Assets included in Form 990, Part X ▶ $ _____

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets *(continued)*

3 Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply)

- a ☐ Public exhibition
- b ☐ Scholarly research
- c ☐ Preservation for future generations
- d ☐ Loan or exchange programs
- e ☐ Other

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIII

5 During the year, did the organization solicit or receive donations of art, historical treasures or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? ☐ Yes ☐ No

Part IV Escrow and Custodial Arrangements.

Complete if the organization answered "Yes" on Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X? ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII and complete the following table

		Amount
c	Beginning balance	1c
d	Additions during the year	1d
e	Distributions during the year	1e
f	Ending balance	1f

2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? . . . ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII Check here if the explanation has been provided in Part XIII . . . . ☐

Part V Endowment Funds. Complete if the organization answered "Yes" on Form 990, Part IV, line 10.

	(a) Current year	(b) Prior year	(c) Two years back	(d) Three years back	(e) Four years back
1a Beginning of year balance					
b Contributions . . .					
c Net investment earnings, gains, and losses					
d Grants or scholarships . . .					
e Other expenditures for facilities and programs . . .					
f Administrative expenses					
g End of year balance					

2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as

- a Board designated or quasi-endowment ▶
- b Permanent endowment ▶
- c Temporarily restricted endowment ▶

The percentages on lines 2a, 2b, and 2c should equal 100%

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by

	Yes	No
(i) unrelated organizations	3a(i)	
(ii) related organizations	3a(ii)	
b If "Yes" on 3a(ii), are the related organizations listed as required on Schedule R?	3b	

4 Describe in Part XIII the intended uses of the organization's endowment funds

Part VI Land, Buildings, and Equipment.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. See Form 990, Part X, line 10.

Description of property	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land	0	189,640		189,640
b Buildings	0	0	0	0
c Leasehold improvements	0	645,520	448,120	197,400
d Equipment	0	4,910,003	4,531,395	378,608
e Other	0	2,232,524	0	2,232,524
Total. Add lines 1a through 1e *(Column (d) must equal Form 990, Part X, column (B), line 10(c))* . . ▶				2,998,172

Part VII **Investments—Other Securities.** Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation Cost or end-of-year market value
(1) Financial derivatives		
(2) Closely-held equity interests		
(3) Other		
(A)		
(B)		
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
Total. *(Column (b) must equal Form 990, Part X, col (B) line 12)* ▶		

Part VIII **Investments—Program Related.** Complete if the organization answered 'Yes' on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
Total. *(Column (b) must equal Form 990, Part X, col (B) line 13)* ▶		

Part IX **Other Assets.** Complete if the organization answered 'Yes' on Form 990, Part IV, line 11d See Form 990, Part X, line 15

(a) Description	(b) Book value
(1)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. *(Column (b) must equal Form 990, Part X, col (B) line 15)* ▶	

Part X **Other Liabilities.** Complete if the organization answered 'Yes' on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
Annuities payable	429,140
Due to affiliates	57,891,646
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. *(Column (b) must equal Form 990, Part X, col (B) line 25)* ▶	58,320,786

2. Liability for uncertain tax positions In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48 (ASC 740) Check here if the text of the footnote has been provided in Part XIII ☑

Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return
Complete if the organization answered 'Yes' on Form 990, Part IV, line 12a.

1	Total revenue, gains, and other support per audited financial statements			1	
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12				
a	Net unrealized gains (losses) on investments	2a			
b	Donated services and use of facilities	2b			
c	Recoveries of prior year grants	2c			
d	Other (Describe in Part XIII)	2d			
e	Add lines **2a** through **2d**			2e	
3	Subtract line **2e** from line **1**			3	
4	Amounts included on Form 990, Part VIII, line 12, but not on line **1**				
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a			
b	Other (Describe in Part XIII)	4b			
c	Add lines **4a** and **4b**			4c	
5	Total revenue Add lines **3** and **4c.** (This must equal Form 990, Part I, line 12)			5	

Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.
Complete if the organization answered 'Yes' on Form 990, Part IV, line 12a.

1	Total expenses and losses per audited financial statements			1	
2	Amounts included on line 1 but not on Form 990, Part IX, line 25				
a	Donated services and use of facilities	2a			
b	Prior year adjustments	2b			
c	Other losses	2c			
d	Other (Describe in Part XIII)	2d			
e	Add lines **2a** through **2d**			2e	
3	Subtract line **2e** from line **1**			3	
4	Amounts included on Form 990, Part IX, line 25, but not on line **1:**				
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a			
b	Other (Describe in Part XIII)	4b			
c	Add lines **4a** and **4b**			4c	
5	Total expenses Add lines **3** and **4c.** (This must equal Form 990, Part I, line 18)			5	

Part XIII Supplemental Information

Provide the descriptions required for Part II, lines 3, 5, and 9, Part III, lines 1a and 4, Part IV, lines 1b and 2b, Part V, line 4, Part X, line 2, Part XI, lines 2d and 4b, and Part XII, lines 2d and 4b Also complete this part to provide any additional information

Return Reference	Explanation
See Additional Data Table	

Part XIII Supplemental Information *(continued)*

Return Reference	Explanation

Additional Data

Software ID: 18007995
Software Version: v1.00
EIN: 23-1381404
Name: PHI dba Presbyterian Senior Living

Supplemental Information

Return Reference	Explanation
Schedule D, Part X, Line 2	The Corporation follows the Financial Accounting Standards Board (FASB) accounting standar d for accounting for uncertainty in income taxes This standard clarifies the accounting f or uncertainty in income axes in a company's consolidated financial statements and prescri bes a recognition thresholds of more-likely-then-not to be sustained upon examination by t he appropriate taxing authority Measurement of the tax uncertainty occurs if the recognit ion threshold has been met The standard also provides guidance on derecognition, classifi cation, interest and penalties, and disclosure Management has determined that this standa rd does not have a material impact on the consolidated financial statements

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Schedule J (Form 990)

Department of the Treasury
Internal Revenue Service

Compensation Information

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

▶ **Complete if the organization answered "Yes" on Form 990, Part IV, line 23.**

▶ **Attach to Form 990.**

▶ **Go to *www.irs.gov/Form990* for instructions and the latest information.**

OMB No 1545-0047

2018

Open to Public Inspection

Name of the organization
PHI dba Presbyterian Senior Living

Employer identification number
23-1381404

Part I Questions Regarding Compensation

			Yes	No
1a	Check the appropiate box(es) if the organization provided any of the following to or for a person listed on Form 990, Part VII, Section A, line 1a Complete Part III to provide any relevant information regarding these items			
	☐ First-class or charter travel	☐ Housing allowance or residence for personal use		
	☐ Travel for companions	☐ Payments for business use of personal residence		
	☐ Tax idemnification and gross-up payments	☐ Health or social club dues or initiation fees		
	☐ Discretionary spending account	☐ Personal services (e g , maid, chauffeur, chef)		
b	If any of the boxes in line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain	**1b**		
2	Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, officers, including the CEO/Executive Director, regarding the items checked in line 1a?	**2**		
3	Indicate which, if any, of the following the filing organization used to establish the compensation of the organization's CEO/Executive Director Check all that apply Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III			
	☑ Compensation committee	☐ Written employment contract		
	☐ Independent compensation consultant	☑ Compensation survey or study		
	☐ Form 990 of other organizations	☑ Approval by the board or compensation committee		
4	During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing organization or a related organization			
a	Receive a severance payment or change-of-control payment?	**4a**	Yes	
b	Participate in, or receive payment from, a supplemental nonqualified retirement plan?	**4b**		No
c	Participate in, or receive payment from, an equity-based compensation arrangement?	**4c**		No
	If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III			
	Only 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.			
5	For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of			
a	The organization?	**5a**	Yes	
b	Any related organization?	**5b**	Yes	
	If "Yes," on line 5a or 5b, describe in Part III			
6	For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of			
a	The organization?	**6a**	Yes	
b	Any related organization?	**6b**	Yes	
	If "Yes," on line 6a or 6b, describe in Part III			
7	For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described in lines 5 and 6? If "Yes," describe in Part III	**7**		No
8	Were any amounts reported on Form 990, Part VII, paid or accured pursuant to a contract that was subject to the initial contract exception described in Regulations section 53 4958-4(a)(3)? If "Yes," describe in Part III	**8**		No
9	If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53 4958-6(c)?	**9**		

Part II **Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees.** Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported on Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii) Do not list any individuals that are not listed on Form 990, Part VII

Note. The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual

(A) Name and Title	**(B)** Breakdown of W-2 and/or 1099-MISC compensation			**(C)** Retirement and other deferred compensation	**(D)** Nontaxable benefits	**(E)** Total of columns (B)(i)-(D)	**(F)** Compensation in column (B) reported as deferred on prior Form 990
	(i) Base compensation	**(ii)** Bonus & incentive compensation	**(iii)** Other reportable compensation				
See Additional Data Table							

Part III Supplemental Information

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II Also complete this part for any additional information

Return Reference	Explanation
Schedule J, Part I, Line 3	Each year, salaries for executives are determined based on comparative data for Leading Age's sponsored salary survey called CEMO Leadership Compensation Survey These salaries are then approved by the Board of Directors For highest paid employees, salaries are set during the yearly budget process by the executive directors of each facility in conjunction with the Controller and Chief Financial Officer These wages are also compared to market studies and are approved, in total, by the board

Return Reference	Explanation
Schedule J, Part I, Line 4	Catherine Chan Ng received $86,719 62 in severance pay during 2018

Return Reference	Explanation
Schedule J, Part I, Line 5	Executive staff is given an incentive plan based on financial goals, growth and development goals, as well as, quality and resident and employee satisfaction goals These goals need to be met not only at the corporate level, but also at a percentage of the related organizations Presbyterian Senior Living must meet operating margins targets which exceed plan in total at both the corporate and at a majority of the facilities

Return Reference	Explanation
Schedule J, Part I, Line 6	Executive staff is given an incentive plan based on financial goals, growth and development goals, as well as, quality and resident and employee satisfaction goals These goals need to be met not only at the corporate level, but also at a percentage of the related organizations Presbyterian Senior Living must meet operating margin targets which exceed plan in total at both the corporate and at a majority of the facilities

Additional Data

Software ID: 18007995
Software Version: v1.00
EIN: 23-1381404
Name: PHI dba Presbyterian Senior Living

Form 990, Schedule J, Part II - Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

(A) Name and Title		(B) Breakdown of W-2 and/or 1099-MISC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation in column (B) reported as deferred on prior Form 990
		(i) Base Compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
Stephen Proctor Board President & Chief Executive Officer	(I)	443,707	0	7,911	54,130	14,901	520,649	0
	(II)	0	0	0	0	0	0	0
James Bernardo Board Vice Chair & Executive Vice President	(I)	304,597	0	7,488	0	14,901	326,986	0
	(II)	0	0	0	0	0	0	0
Jeffrey J Davis Board Treasurer & Senior VP and Chief Financial Officer	(I)	292,949	0	6,189	0	14,901	314,039	0
	(II)	0	0	0	0	0	0	0
Dan Davis Jr Senior VP of Operations-Continuing Care Comm	(I)	227,410	0	1,247	0	17,130	245,787	0
	(II)	0	0	0	0	0	0	0
Steven Fuller VP Medical Director	(I)	218,120	0	6,451	0	7,570	232,141	0
	(II)	0	0	0	0	0	0	0
MaryAnne Adamczyk Board Assistant Secretary & Sr VP Corp Relations	(I)	196,903	0	2,851	0	14,461	214,215	0
	(II)	0	0	0	0	0	0	0
Victoria Hess VP Of Sales and Marketing	(I)	183,434	0	7,313	0	1,653	192,400	0
	(II)	0	0	0	0	0	0	0
Diane Burfiendt VP of Ops-Aff Housing and Pop Hlth	(I)	181,923	0	994	0	17,158	200,075	0
	(II)	0	0	0	0	0	0	0
Teresa Buchman VP Extended Care Operations	(I)	165,176	0	3,010	0	1,764	169,950	0
	(II)	0	0	0	0	0	0	0
Dyan McAlister Board Assistant Treasurer & VP of Finance	(I)	155,990	0	495	0	16,902	173,387	0
	(II)	0	0	0	0	0	0	0
Cynthia Fox VP Human Resources	(I)	148,346	0	712	0	14,338	163,396	0
	(II)	0	0	0	0	0	0	0
Robert Jones VP of Plant Operations & Assets	(I)	140,675	0	2,206	0	16,306	159,187	0
	(II)	0	0	0	0	0	0	0
Nancy Deibler Board Secretary & Executive Administrative Assistant	(I)	51,961	0	8,597	0	6,382	66,940	0
	(II)	0	0	0	0	0	0	0
Deborah Barefoot Regional Director of Operations	(I)	175,496	0	5,182	0	7,078	187,756	0
	(II)	0	0	0	0	0	0	0
Samantha Roos Meiser Executive Director	(I)	147,488	0	21,606	0	12,631	181,725	0
	(II)	0	0	0	0	0	0	0
Catherine Chan Ng Executive Director	(I)	74,727	0	87,896	0	16,001	178,624	0
	(II)	0	0	0	0	0	0	0
Mary Ann Poling Executive Director	(I)	157,807	0	1,403	0	6,911	166,121	0
	(II)	0	0	0	0	0	0	0
Debra Larkin Corp Director of Comp & Privacy	(I)	148,796	5,000	446	0	1,420	155,662	0
	(II)	0	0	0	0	0	0	0

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Schedule L (Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Transactions with Interested Persons

▶ **Complete if the organization answered "Yes" on Form 990, Part IV, lines 25a, 25b, 26, 27, 28a, 28b, or 28c, or Form 990-EZ, Part V, line 38a or 40b.**
▶ **Attach to Form 990 or Form 990-EZ.**
▶**Go to *www.irs.gov/Form990* for the latest information.**

OMB No 1545-0047

2018

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Name of the organization
PHI dba Presbyterian Senior Living

Employer identification number
23-1381404

Part I Excess Benefit Transactions (section 501(c)(3), section 501(c)(4), and 501(c)(29) organizations only)

Complete if the organization answered "Yes" on Form 990, Part IV, line 25a or 25b, or Form 990-EZ, Part V, line 40b

1	(a) Name of disqualified person	(b) Relationship between disqualified person and organization	(c) Description of transaction	(d) Corrected? Yes	(d) Corrected? No

2 Enter the amount of tax incurred by organization managers or disqualified persons during the year under section 4958 . . . . . ▶ $

3 Enter the amount of tax, if any, on line 2, above, reimbursed by the organization . . . . . ▶ $

Part II Loans to and/or From Interested Persons.

Complete if the organization answered "Yes" on Form 990-EZ, Part V, line 38a, or Form 990, Part IV, line 26, or if the organization reported an amount on Form 990, Part X, line 5, 6, or 22

(a) Name of interested person	(b) Relationship with organization	(c) Purpose of loan	(d) Loan to or from the organization? To	(d) Loan to or from the organization? From	(e) Original principal amount	(f) Balance due	(g) In default? Yes	(g) In default? No	(h) Approved by board or committee? Yes	(h) Approved by board or committee? No	(i) Written agreement? Yes	(i) Written agreement? No
Total				▶ $								

Part III Grants or Assistance Benefiting Interested Persons.

Complete if the organization answered "Yes" on Form 990, Part IV, line 27.

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount of assistance	(d) Type of assistance	(e) Purpose of assistance

Part IV **Business Transactions Involving Interested Persons.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 28a, 28b, or 28c.

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount of transaction	(d) Description of transaction	(e) Sharing of organization's revenues?	
				Yes	No
(1) Robert Hornell	PSL Svc Chair, PSL Hsg Mgmt, Pres Home in the Pres of Huntingdon and First National Bank Board Membe	4,578,765	Repayment of loan by group member to First National Bank		No
(2) Kimberly Shockey	Quincy Village Board of Directors Vice Chair and VP at BB&T	1,351,664	Repayment of loan by group member		No
(3) Ann Fedorchak	PSL and PSL Hsg Mgmt Board Member, PSL Svcs Vice Chair and Managing Director at National Cooperative	250,000	Affiliate invested in Advantage mission Deposit certificate held at National Cooperative Bank		No

Part V **Supplemental Information**

Provide additional information for responses to questions on Schedule L (see instructions)

Return Reference	Explanation

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SCHEDULE O (Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on Form 990 or 990-EZ or to provide any additional information.
▶ **Attach to Form 990 or 990-EZ.**
▶ **Go to *www.irs.gov/Form990* for the latest information.**

OMB No 1545-0047

2018

Open to Public Inspection

Name of the organization
PHI dba Presbyterian Senior Living

Employer identification number
23-1381404

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part VI, Section B, Line 11b	A copy of the 990 was provided to the organization's audit committee prior to the submissi on It was reviewed in detail prior to the audit committee meeting by the Chief Financial Officer and other top executives

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part VI, Section B, Line 12c	The compliance department annually reviews the conflict of interest disclosures remitted f rom the officers, directors, and key employees to update and monitor any changes that coul d cause a potential conflict of interest

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part VI, Section B, Line 15	Every year, salaries for executives are determines based on comparative data from Leading Age's sponsored salary survey called CEMO Leadership Compensation Survey These salaries a re then approved by the Board of Directors For highest paid employees, salaries are set d uring the yearly budgeting process by the executive directors for each facility in conjunc tion with the VP of Finance and Chief Financial Officer These wages are also compared to market studies and are approved, in total, by the board

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part VI, Section C, Line 19	Presbyterian Senior Living and all of its affiliates are working hard to promote transpare ncy Therefore, current month/quarterly financial statements are posted right on the PSL w ebsite, along with census and year end audit Its governing documents and conflict of inte rest policy are made available to the public upon request

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part XI, Line 9	Equity received from limited tax partner ($361,350)

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SCHEDULE R (Form 990)

Department of the Treasury
Internal Revenue Service

Related Organizations and Unrelated Partnerships

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.
▶ Attach to Form 990.
▶ Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No 1545-0047

2018

Open to Public Inspection

Name of the organization
PHI dba Presbyterian Senior Living

Employer identification number
23-1381404

Part I **Identification of Disregarded Entities** Complete if the organization answered "Yes" on Form 990, Part IV, line 33.

(a) Name, address, and EIN (if applicable) of disregarded entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Total income	(e) End-of-year assets	(f) Direct controlling entity
(1) Ross Presbyterian GP LLC One Trinity Drive East Suite 201 Dillsburg, PA 17019 35-2467867	Low income housing	PA	-42	-159	PHI
(2) PHI Wisteria Commons LLC One Trinity Drive East Suite 201 Dillsburg, PA 17019 46-4630922	Low income housing	PA	-11	-38,850	PHI
(3) The Shepherds at Wisteria LLC One Trinity Drive East Suite 201 Dillsburg, PA 17019 30-0386033	Low income housing	PA	-11	173,773	PHI
(4) Westminster Place at Windy Hill Village II GP LLC One Trinity Drive East Suite 201 Dillsburg, PA 17019 47-2992542	Low income housing	PA	-136	28,832	PHI
(5) Academy Place GP LLC One Trinity Drive East Suite 201 Dillsburg, PA 17019 46-1987895	Low income housing	PA	0	0	PHI

Part II **Identification of Related Tax-Exempt Organizations** Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related tax-exempt organizations during the tax year.

See Additional Data Table

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512(b)(13) controlled entity? Yes	(g) No

Part III **Identification of Related Organizations Taxable as a Partnership** Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related organizations treated as a partnership during the tax year.

See Additional Data Table

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Predominant income(related, unrelated, excluded from tax under sections 512-514)	(f) Share of total income	(g) Share of end-of-year assets	(h) Disproprtionate allocations?		(i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
							Yes	No		Yes	No	

Part IV **Identification of Related Organizations Taxable as a Corporation or Trust** Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related organizations treated as a corporation or trust during the tax year.

See Additional Data Table

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income	(g) Share of end-of-year assets	(h) Percentage ownership	(i) Section 512(b)(13) controlled entity?	
								Yes	No

Part V Transactions With Related Organizations Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36.

Note. Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule

		Yes	No
1 During the tax year, did the orgranization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?			
a Receipt of **(i)** interest, **(ii)**annuities, **(iii)** royalties, or**(iv)** rent from a controlled entity	1a	Yes	
b Gift, grant, or capital contribution to related organization(s)	1b		No
c Gift, grant, or capital contribution from related organization(s)	1c		No
d Loans or loan guarantees to or for related organization(s)	1d	Yes	
e Loans or loan guarantees by related organization(s)	1e		No
f Dividends from related organization(s)	1f		No
g Sale of assets to related organization(s)	1g		No
h Purchase of assets from related organization(s)	1h		No
i Exchange of assets with related organization(s)	1i		No
j Lease of facilities, equipment, or other assets to related organization(s)	1j		No
k Lease of facilities, equipment, or other assets from related organization(s)	1k		No
l Performance of services or membership or fundraising solicitations for related organization(s)	1l	Yes	
m Performance of services or membership or fundraising solicitations by related organization(s)	1m		No
n Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)	1n		No
o Sharing of paid employees with related organization(s)	1o	Yes	
p Reimbursement paid to related organization(s) for expenses	1p	Yes	
q Reimbursement paid by related organization(s) for expenses	1q	Yes	
r Other transfer of cash or property to related organization(s)	1r	Yes	
s Other transfer of cash or property from related organization(s)	1s	Yes	

2 If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds

See Additional Data Table

(a) Name of related organization	(b) Transaction type (a-s)	(c) Amount involved	(d) Method of determining amount involved

Part VI **Unrelated Organizations Taxable as a Partnership** Complete if the organization answered "Yes" on Form 990, Part IV, line 37.

Provide the following information for each entity taxed as a partnership through which the organization conducted more than five percent of its activities (measured by total assets or gross revenue) that was not a related organization See instructions regarding exclusion for certain investment partnerships

(a) Name, address, and EIN of entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Predominant income (related, unrelated, excluded from tax under sections 512-514)	(e) Are all partners section 501(c)(3) organizations?		(f) Share of total income	(g) Share of end-of-year assets	(h) Disproprtionate allocations?		(i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
				Yes	No			Yes	No		Yes	No	

Part VII Supplemental Information

Provide additional information for responses to questions on Schedule R (see instructions)

Return Reference	Explanation

Additional Data

Software ID: 18007995
Software Version: v1.00
EIN: 23-1381404
Name: PHI dba Presbyterian Senior Living

Form 990, Schedule R, Part II - Identification of Related Tax-Exempt Organizations

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512(b)(13) controlled entity?	
						Yes	No
11630 Glen Arm Road Glen Arm, MD 21057 52-1990463	Fundraising for Glen Meadows Retirement Community	PA	501(c)(3)	7	PHI dba Presbyerian Senior Living		No
One Trinity Drive East Suite 201 Dillsburg, PA 17019 23-1352360	Private Foundation of The Long Community	PA	501(c)(3)	PF	PHI dba Presbyterian Senior Living		No
Presbyterian Homes Inc One Trinity Drive East Suite 201 Dillsburg, PA 17019 23-2941518	Continuing Care	PA	501(c)(3)	9	PHI PHI dba Presbyterian Senior Living		No
Glen Meadows Retirement Community 11630 Glen Arm Road Glen Arm, MD 21057 52-2119125	Continuing Care	PA	501(c)(3)	9	PHI PHI dba Presbyterian Senior Living		No
everyday LIFE 2045 Westgate Drive Suite 100 Bethlehem, PA 180177487 36-4599810	LIFE program	PA	501(c)(3)	9	PHI PHI dba Presbyterian Senior Living		No
PHI Investment Management Services Inc One Trinity Drive East Suite 201 Dillsburg, PA 17019 74-3247363	Investment Services	PA	501(c)(3)	9	PHI PHI dba Presbyterian Senior Living		No
The Long Community 200 West End Avenue Lancaster, PA 17603 94-3446933	Assisted Living	PA	501(c)(3)	9	PHI PHI dba Presbyterian Senior Living		No
Presbyterian Homes in the Presbytery of Huntingdon 120 Holliday Hills Drive Hollidaysburg, PA 16648 23-1352512	Continuing Care	PA	501(c)(3)	9	PHI PHI dba Presbyterian Senior Living		No
Presb Hms in the Presb of Hntnd Fnd PO Box 595 Hollidaysburg, PA 166480595 20-1195007	Fundraising for Presb Hms in the Presb of Hntnd	PA	501(c)(3)	7	PHI PHI dba Presbyterian Senior Living		No
Quincy Retirement Community 6596 Orphanage Road Quincy, PA 17247 23-1173321	Continuing Care	PA	501(c)(3)	9	PHI PHI dba Presbyterian Senior Living		No
Presbyterian Apartments 322 North Second Street Harrisburg, PA 17101 23-1660433	Low income housing	PA	501(c)(3)	9	PHI PHI dba Presbyterian Senior Living		No
Geneva House 325 Adams Ave Scranton, PA 18503 23-1883381	Low income housing	PA	501(c)(3)	9	PHI PHI dba Presbyterian Senior Living		No
Presbyterian Senior Living Services Inc 11630 Glen Arm Road Glen Arm, MD 21057 52-2133513	Continuing Care	PA	501(c)(3)	9	PHI PHI dba Presbyterian Senior Living		No
Presbyterian Senior Living Housing Management Corporation One Trinity Drive East Suite 201 Dillsburg, PA 17019 80-0536225	Low income housing management services	PA	501(c)(3)	9	PHI PHI dba Presbyterian Senior Living		No
One Trinity Drive East Suite 201 Dillsburg, PA 17019 90-0921005	Continuing Care	PA	501(c)(3)	9	PHI PHI dba Presbyterian Senior Living		No
PO Box 302 Cresco, PA 18326 23-2932273	Senior Housing	PA	501(c)(3)	9	PHI PHI dba Presbyterian Senior Living		No
600 East Cathedral Road Philadelphia, PA 19128 23-2018005	Continuing Care	PA	501(c)(3)	7	PHI PHI dba Presbyterian Senior Living		No
One Trinity Drive East Suite 201 Dillsburg, PA 17019 81-3566337	Senior housing	PA	501(c)(3)	9	PHI PHI dba Presbyterian Senior Living		No

Form 990, Schedule R, Part III - Identification of Related Organizations Taxable as a Partnership

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal Domicile (State or Foreign Country)	(d) Direct Controlling Entity	(e) Predominant income(related, unrelated, excluded from tax under sections 512-514)	(f) Share of total income	(g) Share of end-of-year assets	(h) Disproprtionate allocations?		(i) Code V-UBI amount in Box 20 of Schedule K-1 (Form 1065)	(j) General or Managing Partner?		(k) Percentage ownership
							Yes	No		Yes	No	
(1) Schartner House Associates LP One Trinity Drive East Suite 201 Dillsburg, PA 17019 20-4747882	Low income housing	PA	Schartner House Inc	Related	-34	-505		No		Yes		0 01 %
(1) Westminster Place at Parkesburg LP One Trinity Drive East Suite 201 Dillsburg, PA 17019 20-8766428	Low Income Housing	PA	Westminster Place at Parkesburg Inc	Related	-43	59,056		No		Yes		0 01 %
(2) Westminster Place at Windy Hill Village LP I One Trinity Drive East Suite 201 Dillsburg, PA 17019 27-0683872	Low income housing	PA	Westminster Place at Windy Hill Village Inc	Related	-24	3,004,404		No		Yes		0 01 %
(3) Westminster Place at Carroll Village LP I One Trinity Drive East Suite 201 Dillsburg, PA 17019 27-0488126	Low income housing	PA	Westminster Place at Carroll Village Inc	Related	-28	1,007,684		No		Yes		0 01 %
(4) Westminster Place at Bloomsburg LP One Trinity Drive East Suite 201 Dillsburg, PA 17019 90-0536078	Low income housing	PA	Westminster Place at Bloomsburg GP Inc	Related	-33	189,791		No		Yes		0 01 %
(5) Westminster Place at the Long Community LP One Trinity Drive East Suite 201 Dillsburg, PA 17019 80-0536471	Low income housing	PA	Westimnster Place at the Long Community GP Inc	Related	-38	1,826,101		No		Yes		0 01 %
(6) Stewartstown Courtyard LP 145 Pine Grove Circle York, PA 17403 26-1577538	Low income housing	PA	Westminster Place at Stewartstown Inc	Related	-45	63,326		No		Yes		0 01 %
(7) Westminster Place at Quincy Village LP One Trinity Drive East Suite 201 Dillsburg, PA 17019 27-3684407	Low income housing	PA	Westminster Place at Quincy Village GP Inc	Related	-35	224,818		No		Yes		0 01 %
(8) Silver Spring Courtyard LP One Trinity Drive East Suite 201 Dillsburg, PA 17019 23-3022718	Low income housing	PA	Westminster Place at Silver Spring Courtyards GP Inc	Related	1	266,856		No		Yes		0 01 %
(9) SS Gardens LP One Trinity Drive East Suite 201 Dillsburg, PA 17019 73-1626571	Low income housing	PA	Westminster Place at SS Gardens GP Inc	Related	-8	-95,685		No		Yes		0 01 %
(10) Shrewsbury Courtyards II Associates One Trinity Drive East Suite 201 Dillsburg, PA 17019 23-3056691	Low income housing	PA	Westminster Place at Shrewsbury Courtyards II Associates GP Inc	Related	0	-82,817		No		Yes		0 01 %
(11) Shrewsbury Courtyards Associates Limited Partnership One Trinity Drive East Suite 201 Dillsburg, PA 17019 25-1767781	Low income housing	PA	Westminster Place at Shrewsbury Courtyard Associates GP Inc	Related	6	-139,077		No		Yes		50 %
(12) S Overlook LP One Trinity Drive East Suite 201 Dillsburg, PA 17015 75-2991115	Low income housing	PA	Westminster Place at S Overlook GP Inc	Related	-14	-356,513		No		Yes		0 01 %
(13) Stony Brook Gardens LP One Trinity Drive East Suite 201 Dillsburg, PA 17019 20-3703666	Low income housing	PA	Westminster Place at Stony Brook Gardens GP Inc	Related	-31	-521,875		No		Yes		0 01 %
(14) Ross Presbyterian Senior Housing LP One Trinity Drive East Suite 201 Dillsburg, PA 17019 35-2467867	Low income housing	PA	Ross Presbyterian GP LLC	Related	-42	-159		No		Yes		0 01 %

Form 990, Schedule R, Part III - Identification of Related Organizations Taxable as a Partnership

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal Domicile (State or Foreign Country)	(d) Direct Controlling Entity	(e) Predominant income(related, unrelated, excluded from tax under sections 512-514)	(f) Share of total income	(g) Share of end-of-year assets	(h) Disproprtionate allocations?		(i) Code V-UBI amount in Box 20 of Schedule K-1 (Form 1065)	(j) General or Managing Partner?		(k) Percentage ownership
							Yes	No		Yes	No	
(16) Wisteria Commons Senior Housing LP One Trinity Drive East Suite 201 Dillsburg, PA 17019 74-3169417	Low income Housing	PA	The Shepherds at Wisteria LLC PHI Wisteria Commons LLC	Related	-22	134,923		No		Yes		0 01 %
(1) Northampton Place at Easton LP One Trinity Drive East Suite 201 Dillsburg, PA 17019 30-0750353	Low income housing	PA	Northampton Place at Easton GP Inc	Related	0	0		No		Yes		0 01 %
(2) Westminster Place at Queen Street LP One Trinity Drive East Suite 201 Dillsburg, PA 17019 46-1217566	Low income housing	PA	Westminster Place at Queen Street GP Inc	Related	-38	886,719		No		Yes		0 01 %
(3) Westminster Place at Ware Presbyterian Village LP One Trinity Drive East Suite 201 Dillsburg, PA 17019 38-3852987	Low income housing	PA	Westminster Place at Ware Presbyterian Village GP	Related	-63	99,922		No		Yes		0 01 %
(4) Long Crest Senior Housing LP One Trinity Drive East Suite 201 Dillsburg, PA 17019 32-0446143	Low income housing	PA	Long Crest Senior Housing GP	Related	0	0		No		Yes		0 01 %
(5) Westminster Place at Windy Hill Village II LP One Trinity Drive East Suite 201 Dillsburg, PA 17019 47-3008552	Low income housing	PA	Westminster Place at Wind Hill Village II GP LLC	Related	-136	28,832		No		Yes		0 01 %
(6) Westminster Place at Huntingdon LP One Trinity Drive East Suite 201 Dillsburg, PA 17019 27-3684236	Low income housing	PA	Westminster Place at Huntingdon GP Inc	Related	0	0		No		Yes		0 01 %
(7) Academy Place Senior Housing LP One Trinity Drive East Suite 201 Dillsburg, PA 17019 90-0935098	Low income housing	PA	Academy Place GP LLC	Related	0	0		No		Yes		0 01 %
(8) Oaks Senior Community LP One Trinity Drive East Suite 201 Dillsburg, PA 17019 23-3018312	Low income housing	PA	The Shepherds in Monroe County Inc	Related	-14	-518		No		Yes		0 02 %

Form 990, Schedule R, Part IV - Identification of Related Organizations Taxable as a Corporation or Trust

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income	(g) Share of end-of-year assets	(h) Percentage ownership	(i) Section 512 (b)(13) controlled entity?	
								Yes	No
(1) Schartner House Inc One Trinity Drive East Suite 201 Dillsburg, PA 17019 86-1161245	Low income housing	PA	PHI	C	-34	-505	100 %		No
(1) Westminster Place at Parkesburg Inc One Trinity Drive East Suite 201 Dillsburg, PA 17019 20-8765826	Low income housing	PA	PHI	C	-43	59,056	100 %		No
(2) Westminster Place at Windy Hill Village Inc One Trinity Drive East Suite 201 Dillsburg, PA 17019 80-0438848	Low income housing	PA	PHI	C	-24	3,004,404	100 %		No
(3) Westminster Place at Carroll Village Inc One Trinity Drive East Suite 201 Dillsburg, PA 17019 56-2642596	Low income housing	PA	PHI	C	-28	1,007,684	100 %		No
(4) Westminster Place at Bloomsburg GP Inc One Trinity Drive East Suite 201 Dillsburg, PA 17019 01-0945558	Low income housing	PA	PHI	C	-33	189,791	100 %		No
(5) Westminster Place at Stewartstown Inc One Trinity Drive East Suite 201 Dillsburg, PA 17019 80-0499627	Low income housing	PA	PHI	C	-45	63,326	100 %		No
(6) Westminster Place at the Long Community GP Inc One Trinity Drive East Suite 201 Dillsburg, PA 17019 01-0945563	Low income housing	PA	PHI	C	-38	1,826,101	100 %		No
(7) Westminster Place at Quincy Village GP Inc One Trinity Drive East Suite 201 Dillsburg, PA 17019 27-3684321	Low income housing	PA	PHI	C	-35	224,818	100 %		No
(8) Westminster Place at Silver Spring Courtyards GP Inc One Trinity Drive East Suite 201 Dillsburg, PA 17019 45-4799705	Low income housing	PA	PHI	C	1	266,856	100 %		No
(9) Westminster Place at SS Gardens GP Inc One Trinity Drive East Suite 201 Dillsburg, PA 17019 45-4806531	Low income housing	PA	PHI	C	-8	-95,685	100 %		No
(10) Westminster Place at Shrewsbury Courtyards II Associates GP Inc One Trinity Drive East Suite 201 Dillsburg, PA 17019 46-2423186	Low income housing	PA	PHI	C	0	-82,817	100 %		No
(11) Westminster Place at Shrewsbury Courtyards Associates GP Inc One Trinity Drive East Suite 201 Dillsburg, PA 17019 46-2414824	Low income housing	PA	PHI	C	6	-139,077	100 %		No
(12) Westminster Place at S Overlook GP Inc One Trinity Drive East Suite 201 Dillsburg, PA 17019 46-2390529	Low income housing	PA	PHI	C	-14	-356,513	100 %		No
(13) Westminster Place at Stony Brook Gardens GP Inc One Trinity Drive East Suite 201 Dillsburg, PA 17019 46-2433909	Low income housing	PA	PHI	C	-31	-521,875	100 %		No
(14) Ross Presbyterian GP LLC One Trinity Drive East Suite 201 Dillsburg, PA 17019 46-1976623	Low income housing	PA	PHI	C	-42	-159	100 %		No

Form 990, Schedule R, Part IV - Identification of Related Organizations Taxable as a Corporation or Trust

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income	(g) Share of end-of-year assets	(h) Percentage ownership	(i) Section 512 (b)(13) controlled entity?	
								Yes	No
(16) The Shepherds at Wisteria LLC One Trinity Drive East Suite 201 Dillsburg, PA 17019 30-0386033	Low income housing	PA	PHI	C	-11	173,773	100 %		No
(1) PHI Wisteria Commons LLC One Trinity Drive East Suite 201 Dillsburg, PA 17019 46-4630922	Low income housing	PA	PHI	C	-11	-38,850	100 %		No
(2) Northampton Place at Easton GP Inc One Trinity Drive East Suite 201 Dillsburg, PA 17019 46-0945632	Low income housing	PA	PHI	C	0	0	100 %		No
(3) Westminster Place at Queen Street GP Inc One Trinity Drive East Suite 201 Dillsburg, PA 17019 38-3855437	Low income housing	PA	PHI	C	-38	886,719	100 %		No
(4) Westminster Place at Ware Presbyterian Village GP Inc One Trinity Drive East Suite 201 Dillsburg, PA 17019 45-3537036	Low income housing	PA	PHI	C	0	0	100 %		No
(5) Westminster Place at Huntingdon GP Inc One Trinity Drive East Suite 201 Dillsburg, PA 17019 27-3684149	Low income housing	PA	PHI	C	0	0	100 %		No
(6) Westminster Place at Windy Hill Village II GP LLC One Trinity Drive East Suite 201 Dillsburg, PA 17019 47-2992542	Low income housing	PA	PHI	C	0	0	100 %		No
(7) Academy Place GP LLC One Trinity Drive East Suite 201 Dillsburg, PA 17019 46-1987895	Low income housing	PA	PHI	C	0	0	100 %		No
(8) Long Crest Senior Housing GP Inc One Trinity Drive East Suite 201 Dillsburg, PA 17019 47-1523599	Low income housing	PA	PHI	C	0	0	100 %		No

Form 990, Schedule R, Part V - Transactions With Related Organizations

	(a) Name of related organization	(b) Transaction type(a-s)	(c) Amount Involved	(d) Method of determining amount involved
(1)	Westminster Place at Parkesburg LP	a-i	261,527	Interest based on debt agreement between Westminster Place at Parkesburg LP and PHI
(1)	Westminster Place at Parkesburg LP	d	-194,797	Loan amount based on agreement between Westminster Place at Parkesburg LP and PHI
(2)	Schartner House Associates LP	a-i	101,255	Interest based on debt agreement between Schartner House Associates LP and PHI
(3)	Schartner House Associates LP	p	-60,527	Actual reimbursements made for expenses incurred Based on invoices paid
(4)	Westminster Place at Quincy Village LP	a-i	72,625	Interest based on debt agreement between Westminster Place at Quincy Village LP and PHI
(5)	Westminster Place at the Long Community LP	p	-79,099	Actual reimbursements made for expenses incurred Based on invoices paid
(6)	Westminster Place at Windy Hill Village II LP	s	3,464,390	Actual cash transferred
(7)	Westminster Place at Queen Street LP	a-i	67,267	Interest based on debt agreement between Westminster Place at Queen Street and PHI
(8)	Westminster Place at Queen Street LP	s	-635,845	Actual cash transferred
(9)	PHI Presbyterian Apartments	q	81,298	Actual reimbursements made for expenses incurred Based on invoices paid
(10)	Ross Presbyterian Senior Housing LP	a-i	120,456	Interest based on debt agreement between Ross Presbyterian Senior Housing and PHI
(11)	Westminster Place at Ware Presbyterian Village LP	a-i	91,068	Interest based on debt agreement between Westminster Place at Ware Presbyterian Village and PHI
(12)	Westminster Place at Ware Presbyterian Village LP	s	1,937,206	Actual cash transferred
(13)	Westminster Place at Ware Senior Housing	a-i	90,319	Interest based on debt agreement between Westminster Place at Ware Senior Housing and PHI
(14)	Westminster Place at Ware Senior Housing	s	-787,851	Actual cash transferred
(15)	PHI Presbyterian Senior Living Services Inc	l	-1,273,859	Management services based on contract between PHI Presbyterian Senior Living Service Inc and PHI
(16)	PHI Presbyterian Senior Living Services Inc	r	2,813,278	Actual cash transferred
(17)	Shrewsbury Courtyards II Associates	p	-56,413	Actual reimbursements made for expenses incurred Based on invoices paid
(18)	Shrewsbury Courtyards II Associates	s	127,500	Actual cash transferred
(19)	Cathedral Village	l	-2,322,319	Management services based on contract between Cathedral Village and PHI
(20)	Cathedral Village	r	8,297,677	Actual cash transferred
(21)	PHI Presbyterian Senior Living Housing Management Corporation	l	93,612	Management services based on contract between PHI Presbyterian Senior Living Housing Management Corporation and PHI
(22)	PHI PHI Investment Management Services Inc	r	-2,027,778	Actual cash transferred
(23)	PHI Presbyterian Homes in the Presbytery of Huntingdon	l	-3,432,014	Management services based on contract between PHI Presbyterian Homes in the Presbytery of Huntingdon and PHI
(24)	PHI Presbyterian Homes in the Presbytery of Huntingdon	r	10,999,445	Actual cash transferred

Form 990, Schedule R, Part V - Transactions With Related Organizations

	(a) Name of related organization	(b) Transaction type(a-s)	(c) Amount Involved	(d) Method of determining amount involved
(26)	The Long Home	l	-457,145	Management services based on contract between The Long Home and PHI
(1)	The Long Home	q	-844,257	Actual reimbursements made for expenses incurred Based on invoices paid
(2)	PHI Quincy Retirement Community	l	-1,793,314	Management services based on contract between PHI Quincy Retirement Community and PHI
(3)	PHI Quincy Retirement Community	r	12,169,247	Actual cash transferred
(4)	PHI Presbyterian Homes Inc	l	-10,663,846	Management services based on contract between PHI Presbyterian Homes Inc and PHI
(5)	PHI Presbyterian Homes Inc	q	-8,024,791	Actual reimbursements made for expenses incurred Based on invoices paid