Return of Private Foundation

Foundation may be made public.

Porm Sylven PP Department of the Treasury Internal Revenue Service	or Section 4947(a)(1) Trust Treated as Private Foundation Do not enter social security numbers on this form as it may be made public Go to www.irs.gov/Form990PF for instructions and the latest information.

For calendar yea	ir 2018 or tax year t	eginning			, and e	noing		
Name of foundar	tion		_		_		A Employer identification	number
BYRON A	A. ROOT M	EMORIAL TRU	ST FU	ND				
BURKE,	COSTANZA	& CARBERRY	LLP,	TRUSTE	E		31-6192613	<u>}_</u> _
Number and street	(or P O box number if i	mail is not delivered to street	address)			Room/suite	B Telephone number	
9191 BF	ROADWAY	-					219-769-13	313
		ntry, and ZIP or foreign p	ostal code				C if exemption application is	
MERRILI		· ·					, oxomption approach to	
G Check all that		nitial return	In	itial return of a f	ormer public	charity	D 1. Foreign organization	s, check here
a Oncon un mar		inal return		mended return	ommor pasmo	onani,	. Torongar or garnization	5, 0110011 11010
	===	Address change		ame change			Foreign organizations mechack here and attach call	seting the 85% test,
H Check type of		X Section 501(c)(3) ex					1	
	947(a)(1) nonexemp	· · · · · · · · · · · · · · · · · · ·		le private found	ation	1)4	E If private foundation sta	
						rupl	under section 507(b)(1	• •
	ue of all assets at er				L Acc	ruai	F If the foundation is in a	
(from Part II, co	oi. (c), line 16)	, 265 . (Part I, colun	her (specify	ha an each bac	ıo \		under section 507(b)(1)(B), check here
S-4 1 Arely							 	1 (4)
Part I Analy	ital of amounts in colum	Expenses ns (b), (c), and (d) may not		evenue and ses per books		nvestment	(c) Adjusted net	(d) Disbursements for charitable purposes
necess	sarily equal the amounts	in column (a))	expens	es per books	Inc	ome	income	(cash basis only)
I	outions, gifts, grants						N/A	
		is not required to attach Sch. B						
3 Interest cash inv	on savings and tempora vestments	ary			ļ <u>.</u>			
4 Divider	nds and interest from	n securities		<u>27,871.</u>	2	27,871.		STATEMENT 1
5a Gross	rents							
b Net rent	al income or (loss)							
6a Net gair	or (loss) from sale of as	ssets not on line 10		-528.				
Gross s	ales price for all	3,765.						
7 Capital	gain net income (from P				_	0.		
8 Net sho	ort-term capital gain	•					ļ ————————————————————————————————————	
	e modifications				· · · · · · · · · · · · · · · · · · ·			
0	ates less returns							
8	ost of goods sold				 			
	profit or (loss)				 			
	ncome				 		 	
_ _		14		27,343.		27,871.	 	
- CO	Add lines 1 through			5,000.	 	1.031.	 	3 000
144 00	nsation of officers, direc		<u> </u>	5,000.	 	1,031.	 	3,969.
	employee salaries an	•			 		 	
15 Pensio	n plans, employee b		 -	000			 	
🗐 16a Legal f		STMT 2		993.		993.		0.
b Accour	nting fees	STMT 3		2,400.	 	2,400.		0.
c Other p	professional fees	RECEIV	ED_		ļ			
b Account C Other programme of the control of the c	st .				ļ		 	
18 Taxes		STEE #4	2 019 - 1 3	801.	<u> </u>	801.		0.
19 Depred اعض	ciation and depletion	ISI DEC V4	1010	ģ				
20 Occupa		ļ - L		<u>K</u>				
₹ 21 Travel,	conferences, and m	neetings OGDEN	UT					
22 Printing	g and publications							
වූ 23 Other e	expenses							
ia 24 Total o	perating and admir	nistrative						
- I	ses. Add lines 13 thi			9,194.	1	5,225.		3,969.
25 Contrib	outions, gifts, grants	-		35,382.				35,382.
1								
l l		rsements			ì		1	1
I Ann iin	expenses and disbu	rsements		44.576		5.225		30 351
	expenses and disbu			44,576.	 	5,225.		39,351.
27 Subtra	expenses and disburies 24 and 25 ct line 26 from line 1	12:				5,225.		39,351.
27 Subtra	expenses and disburies 24 and 25 and 25 and 26 from line 1 and revenue over expense	12: es and disbursements		44,576. 17,233.		-		39,351.
27 Subtra a Excess of b Net inv	expenses and disburies 24 and 25 ct line 26 from line 1	12: es and disbursements negative, enter -0-)				5,225.	N/A	39,351.

Form 990-PF (2018) BURKE, COSTANZA & CARBERRY LLP, TRUSTEE 31-6192613 Page 2

Part II Balance Sheets Attached schedules and amounts column should be for end-of-year	In the description Beginning of year	End of y	
column should be for end-of-year	(a) Dook value	(b) Book Value	(c) Fair Market Value
1 Cash - non-interest-bearing	44,686.	38,072.	38,072.
2 Savings and temporary cash investments			
3 Accounts receivable ►			
Less: allowance for doubtful accounts ▶			
4 Pledges receivable ►			
Less: allowance for doubtful accounts ▶			
5 Grants receivable			
6 Receivables due from officers, directors, trustees, ar	d other		
disqualified persons			
7 Other notes and loans receivable			
Less: allowance for doubtful accounts			
2 8 Inventories for sale or use			
9 Prepaid expenses and deferred charges			
10a Investments - U.S. and state government obligations			
b Investments - corporate stock			
c Investments - corporate bonds			
11 Investments - land, buildings, and equipment basis			
Less accumulated depreciation			
12 Investments - mortgage loans			
13 Investments - other	STMT 5 307,158.	307,158.	822,193.
14 Land, buildings, and equipment: basis			
Less accumulated depreciation			
15 Other assets (describe ►			
16 Total assets (to be completed by all filers - see the			
instructions. Also, see page 1, item I)	351,844.	345,230.	860,265.
17 Accounts payable and accrued expenses	332,7322	010/1001	00072021
18 Grants payable			
40 0.6			
20 Loans from officers, directors, trustees, and other disqualified 21 Mortgages and other notes payable	Percent		
21 Mortgages and other notes payable	persons		
22 Other liabilities (describe			
ZZ Other habilities (desserted			·
23 Total liabilities (add lines 17 through 22)	0.	0.	
Foundations that follow SFAS 117, check here	•		
and complete lines 24 through 26, and lines 30 an	421		
ω	4 3 1.		
5 25 Temporarily restricted			-
25 Temporarily restricted			
26 Permanently restricted	ire 🕨 🗓		
Foundations that do not follow SFAS 117, check he	ile PLAJ		
24 Unrestricted 25 Temporarily restricted 26 Permanently restricted Foundations that do not follow SFAS 117, check he and complete lines 27 through 31. 27 Capital stock, trust principal, or current funds 28 Paid-in or capital surplus, or land, bldg., and equipm 29 Retained earnings, accumulated income, endowmen 30 Total net assets or fund balances	363,093.	363,093.	
Capital stock, trust principal, or current funds Paid-in or capital surplus, or land, bldg., and equipm		303,093.	
Paid-in or capital surplus, or land, bldg., and equipmed Retained earnings, accumulated income, endowmen		-17,863.	
Retained earnings, accumulated income, endowmen	351,844.		
30 Total net assets or fund balances	331,644.	345,230.	
24 Total liabilities and not accept found belonge	351 044	345,230.	•
31 Total liabilities and net assets/fund balances	351,844.	345,230.	
Part III Analysis of Changes in Net Ass	ets or Fund Balances		
Total net assets or fund balances at beginning of year - Pa	rt II. column (a). line 30		
	• • •		251 044
(must agree with end-of-year figure reported on prior year 2 Enter amount from Part I, line 27a	o return)	1	351,844.
	TOD VEXDE ADTHOMESIME	2	<u>-17,233.</u>
3 Other increases not included in line 2 (itemize) ► PR 4 Add lines 1, 2, and 3	TOW I THANS ADDUSTMENTS	3	10,619.
• •		4	345,230.
5 Decreases not included in line 2 (itemize)	uus line E\ Port II eelume (h\ line 00	5	345 330
6 Total net assets or fund balances at end of year (line 4 mir	ius iine 3) - Part II, Columii (0), line 30	6	345,230.

	the kind(s) of property sold (for example the kind(s) of property sold (for example kind(s)) and (for example kin		te,	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a DISPOSAL OF WAS	SHINGTON PRIM GE	RP			10/18/14	12/17/18
b						
<u>. c </u>						
e						
(e) Gross sales price	(f) Depreciation allowed		t or other basis		(h) Gain or (loss	;)
	(or allowable)	plus e	xpense of sale		((e) plus (f) minus	
a 3,765.			4,29	3.		
c c		 		+		
d						
e						
Complete only for assets showin	g gain in column (h) and owned by				Gains (Col. (h) gair	
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69		cess of col. (1) col. (j), if any	COI.	(k), but not less tha Losses (from col.	(h))
2	0001120700		001. ()), 11 0119			-528
a b						
С						
d						
e				_		
Capital gain net income or (net ca	pital loss) $ \begin{cases} & \text{if gain, also enter} \\ & \text{if (loss), enter-} \end{cases} $	er in Part I, line î 0- in Part I, line	7 7	} 2		-528
Net short-term capital gain or (los		ınd (6):				
If gain, also enter in Part I, line 8, If (loss), enter -0- in Part I, line 8	column (c).			 	N/A	
Part V Qualification U	nder Section 4940(e) fo	r Reduced	Tax on Net	Investment Inco		
For optional use by domestic private	foundations subject to the section	4940(a) tax on	net investment ind	come.)		
f section 4940(d)(2) applies, leave th	nis nart hlank					
				- 40		Yes X No
Vas the foundation liable for the sect i "Yes," the foundation doesn't qualify			•	00.		LYes L&No
	each column for each year; see the			itries.	· <u>.</u>	
(a) Base period years	(b)			(c)	Distri	(d) bution ratio
Calendar year (or tax year beginning			Net value of nor	ncharitable-use assets	(col. (b) di	vided by col. (c))
2017		36,197.		809,299	•	.044726
2016		36,402. 25,841.		762,511 723,400		.047740
2015 2014		20,401.		710,706		.028705
2013		20,594.		647,187		.031821
Total of line 1, column (d)					2	.188714
Average distribution ratio for the 5		on line 2 by 5.0), or by the numbe	r of years		
the foundation has been in exister	nce if less than 5 years				3	.037743
Enter the net value of noncharitab	laurea accete for 2018 from Part Y	line 5			4	851,911.
Lines the net value of noncharitab	ic-use assets for 2010 from rait A,	, 11116 5			7	031,911
Multiply line 4 by line 3					5	32,154
Enter 1% of net investment incom	e (1% of Part I, line 27b)				6	226
Add long Fand O						20 200
Add lines 5 and 6					7	32,380.
Enter qualifying distributions from	Part XII. line 4				8	_39,351.
, , ,	line 7, check the box in Part VI, line	e 1b, and comn	lete that part using	a 1% tax rate	<u></u>	
See the Part VI instructions.	Ty Control of the Con	, vomp		, ,		
23521 12-11-18					· · · · · · · · · · · · · · · · · · ·	Form 990-PF (2018

BYRON A. ROOT MEMORIAL TRUST FUND COSTANZA & CARBERRY LLP, TRUSTEE BURKE 31-6192613 Page 4 Part VI , Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions) 1a Exempt operating foundations described in section 4940(d)(2), check here \(\bigcup \) and enter "N/A" on line 1. _____ (attach copy of letter if necessary-see instructions) Date of ruling or determination letter: b Domestic foundations that meet the section 4940(e) requirements in Part V, check here 🕒 🗓 and enter 1% 226. of Part I, line 27b c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b). 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) 3 Add lines 1 and 2 3 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) 5 Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0-5 6 Credits/Payments: 801 a 2018 estimated tax payments and 2017 overpayment credited to 2018 6a b Exempt foreign organizations - tax withheld at source 0. 6b c Tax paid with application for extension of time to file (Form 8868) 0. 60 0 d Backup withholding erroneously withheld 6d 801. 7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here _____ if Form 2220 is attached 8 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 Enter the amount of line 10 to be: Credited to 2019 estimated tax Part VII-A | Statements Regarding Activities 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in Yes No X any political campaign? 1a Х b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition 1b If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities. c Did the foundation file Form 1120-POL for this year? Х 1c d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ \$ _____ O. (2) On foundation managers. ▶ \$ e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$ 2 Has the foundation engaged in any activities that have not previously been reported to the IRS? X 2 If "Yes," attach a detailed description of the activities. 3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? 4a Х N/A b If "Yes," has it filed a tax return on Form 990-T for this year? X 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? 5 If "Yes," attach the statement required by General Instruction T. 6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law X remain in the governing instrument? X 7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV

Form **990-PF** (2018)

IN

8a Enter the states to which the foundation reports or with which it is registered. See instructions.

year 2018 or the tax year beginning in 2018? See the instructions for Part XIV. If "Yes," complete Part XIV

of each state as required by General Instruction G? If "No," attach explanation

b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate)

10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses

9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar

1 All any time during the year, did the foundation, directly or indirectly, own a commolled entity within the meaning of section 512(b)(13)? If Yes, "attach schedule. See instructions 12 Did the foundation make a detirection to a decirection or a desirection of the desirection of th	Pa	rt VII-A Statements Regarding Activities (continued)			
section 512(b) (13)? If Yes, a tailch schedule, See instructions Did the foundation make a detribution to a dinor advised fund over which the foundation or a disqualified person had advisory privileges? If Yes, stands statement, See instructions 10. Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address > N/A 11. The books are in care of > ROWLEY & COMPANY LLP Tolephone no. 219-874-1437 Located at > 40.9 W. KLEFFER ROAD, MICHIGAN CITY, IN IP 14 46360 15. Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in flee of Form 1041 - check here and either the amount of law-exempt interest received or accrued during the year At any time during calendar year 2016, and the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing regimenants for FinEPForm 114. If Yes, either the name of the foreign country. Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1a Digrap the year, did the foundation (either directly or indirectly); 1) Engage in the sale or exchange, or lessing of property with a disqualited person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualited person? (3) Formish goods, services, or facilities to (or accept them from) a disqualited person? (4) Pay compensation to, or pay or reminises the expenses of, a disqualited person? (5) Agrice to by money or property to a government official? (Exception, Check 'No' if the foundation engage in a prior year in any of the acts felt to qualify under the exceptions described in Regulations section 53-494 (10)-3 or in a current notice regarding disaster assistance, Neber here 2 Did the foundation engage in a prior year in any of the acts feet to qualify under the excep				Yes	No
section 512(b) (13)? If Yes, a tailch schedule, See instructions Did the foundation make a detribution to a dinor advised fund over which the foundation or a disqualified person had advisory privileges? If Yes, stands statement, See instructions 10. Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address > N/A 11. The books are in care of > ROWLEY & COMPANY LLP Tolephone no. 219-874-1437 Located at > 40.9 W. KLEFFER ROAD, MICHIGAN CITY, IN IP 14 46360 15. Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in flee of Form 1041 - check here and either the amount of law-exempt interest received or accrued during the year At any time during calendar year 2016, and the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing regimenants for FinEPForm 114. If Yes, either the name of the foreign country. Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1a Digrap the year, did the foundation (either directly or indirectly); 1) Engage in the sale or exchange, or lessing of property with a disqualited person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualited person? (3) Formish goods, services, or facilities to (or accept them from) a disqualited person? (4) Pay compensation to, or pay or reminises the expenses of, a disqualited person? (5) Agrice to by money or property to a government official? (Exception, Check 'No' if the foundation engage in a prior year in any of the acts felt to qualify under the exceptions described in Regulations section 53-494 (10)-3 or in a current notice regarding disaster assistance, Neber here 2 Did the foundation engage in a prior year in any of the acts feet to qualify under the excep	11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of			
12. Did the foundation make a distribution to a donor adwised fund over which the foundation or a disqualified person had advisory privileges? 13. Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A 15. The books are in care of ► ROWLEY & COMPANY LLP Telephone no ►219-874-1437 Located at ► 40.9 W. KLEFFER ROAD, MICHIGAN CITY, IN Section 497((1)) nonexempt charatable trusts filing form 590-Filin fell of form 1041- check here and enter the amount of tax-exempt interest received or accrued during the year At any time during calendar year 2018, did the foundation have an interest in or a signature or other authority over a bank, section is continuously to exceptions and filing requirements for FinEFORT Form 114. If "Yes," enter the name of the foreign country ► Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 H any item is checked in the "Yes" column, unless an exception applies. 15. Tangenge in the sale or exchange, or lessing of property with a disqualified person? 16. Expange in the sale or exchange, or lessing of property with a disqualified person? 17. Form 19. Fo		· · · · · · · · · · · · · · · · · · ·	11		х
If Yes,¹ affach statement. See instructions 10 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Webside address ► N/A 11 The books are in care of ► ROWLEY & COMPANY LLP Telephone no. ► 219-874-1437 Located at ₱ 409 ₩. KIEFFER ROAD, MICHIGAN CITY, IN Section 4947(a)(1) nonexempt charitable trusts filing form 999-PF in theu of Form 1041-check here and enter the amount of tax-exempt interest received or accrued during the year 16. At any time during calendar year 2018, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If Yes,¹ enter the name of the foreign country. File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1 During the year, did the foundation (either directly or indirectly). 1 Engage in the sale or exchange, or leasing of property with a disqualified person? 2 Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? 3 Furnish goods, services, or facilities to (or accept them from) a disqualified person? 4 Pay compensation to, or pay or remiburse the expenses of, a disqualified person? 5 Farister any income or assess to a disqualified person? 6 Agree to pay money fromey fromey to a government official? (Exception, Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termation of government property or approvement official? (Exception, Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termation of government property or approvement official? (Exception, Check 'No' if the foundation of payers proper property or approvement official? (Exception, Check 'No' if the foundation of payers	12				
13	-		12		x
Website address N A	13			х	
14 The books are mare of ► ROWLEY & COMPANY LID Telephone no. ►219-874-1437 Located at ►409 W. KIEFFER ROAD, MICHIGAN CITY, IN 2P+4 ►46360 15 Section 4947(3)(1) nonexempt charitable trusts fling form 930-9Fin lieu of Form 1041-check here and enter the amount of tax-exempt interests received or accrued during the year 16 A any time during calendar year 2018, dut the foundation have any metrest in or a signature or other authority over a bank, securities, or other intenancial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If *7es,* enter the name of the foreign country ► Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1a During the year, did the foundation (either directly or indirectly); (1) Engage in the salo or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise sorted credit to (or accept it from) a disqualified person? (3) Furnish poods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or remburse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (or make any of either available for the benefit or use of a disqualified person) (6) Agree to pay money or property to a government official? (Exception, Check 'No' if the foundation agreed to make a grant to to it oemploy the efficial for a period after termination of government service, if terminating within 90 days.) b) If any answer is 'Yes' to 1a(1)-(6), did any of the acts discorded in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2018? c) Agree to pay money from person in a provivea					
Located at \$\subset\$ 409 W. KLEFFRR ROAD, MICHIGAN CITY, IN Section 4947(a)(1) nonexempt charabile trusts filing form 990-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year 16. At any time during calendar year 2018, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the form 15 Statements Regarding Activities for Which Form 4720 May Be Required FILE Form 4720 If any item is checked in the "Yes" column, unless an exception applies. 1a During the year, did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or remiburse the expenses of, a disqualified person? (5) Transfer any incine or assets to a disqualified person ("read any of either available for the benefit or use of a disqualified person ("read any of either available for the benefit or use of a disqualified person ("read any of either available for the benefit or use of a disqualified person ("read any of either available for the benefit or use of a disqualified person ("read any of either available for the benefit or use of a disqualified person ("read any of either available for the benefit or use of a disqualified person ("read any of either available for the benefit or use of a disqualified person ("read any of either available for the benefit or use of a disqualified person ("read any of either available for the benefit or use of a disqualified person ("read any of either available for the benefit or use of a disqualified person ("read any of either available for	14		74-1	437	
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If the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) If any answer is "Yes" to 1a(1)-(6), did any of the acts fall to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions N/A Organizations relying on a current notice regarding disaster assistance, check here Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2018? Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)): At the end of tax year 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2018? If "Yes," list the years Yes X No If "Yes," list the years Yes X No If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. Yes X No If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. Yes X No If "Yes," did it have excess business holdings in 2018 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C,					
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				1	
Lift I			3b	}	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	42	·		 	x
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that			70		
had not been removed from jeopardy before the first day of the tax year beginning in 2018? 4b X			4h]	x
Form 990-PF (2018)	_)-PF	

BYRON A. ROOT MEMORIAL TRUST FUND COSTANZA & CARBERRY LLP

TRUSTEE

31-6192613

Page 6

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued) Yes No 5a During the year, did the foundation pay or incur any amount to: Yes X No (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, Yes X No any voter registration drive? Yes 🗓 No (3) Provide a grant to an individual for travel, study, or other similar purposes? (4) Provide a grant to an organization other than a charitable, etc., organization described in section Yes X No 4945(d)(4)(A)? See instructions (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for Yes X No the prevention of cruelty to children or animals? b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions N/A5b Organizations relying on a current notice regarding disaster assistance, check here c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained 」Yes □ No expenditure responsibility for the grant? N/A If "Yes," attach the statement required by Regulations section 53.4945-5(d). 6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on __ Yes 🗶 No a personal benefit contract? b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? 66 X If "Yes" to 6b, file Form 8870. Yes X No 7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? N/A 7b 8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or] Yes 🕱 No excess parachute payment(s) during the year? Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors 1 List all officers, directors, trustees, and foundation managers and their compensation. (d) Contributions to employee benefit plans and deferred compensation (b) Title, and average hours per week devoted to position (c) Compensation (e) Expense account, other (If not paid. (a) Name and address enter -0allowances BURKE, COSTANZA & CARBERRY LLP TRUSTEE 9191 BROADWAY MERRILLVILLE, IN 46410 2.00 5,000 0 0. 2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE." (d) Contributions to employee benefit plans and deterred (e) Expense account, other allowances (b) Title, and average (a) Name and address of each employee paid more than \$50,000 hours per week devoted to position (c) Compensation compensation NONE

823551 12-11-18

Form 990-PF (2018)

BURKE,

Total number of other employees paid over \$50,000

Form **990-PF** (2018)

Form **990-PF** (2018)

Total. Add lines 1 through 3

All other program-related investments. See instructions.

Form 990-PF (2018) '

_	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign fou	_	enstructions \
_	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:	1 1	
1	Average monthly fair market value of securities	1a	847,193.
	• •	1b	17,691.
	Average of monthly cash balances	1c	17,091.
_	Fair market value of all other assets	1d	864,884.
d		10	004,004.
е	Reduction claimed for blockage or other factors reported on lines 1a and		
_	1c (attach detailed explanation) 1e 0.	7 1	0
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	864,884.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	<u>12,973.</u>
5	Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4	5	851,911.
6	Minimum investment return. Enter 5% of line 5	1.6.	42,596.
	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations at foreign organizations, check here ▶ ☐ and do not complete this part.)	nd certain	
1	Minimum investment return from Part X, line 6	1	42,596.
2a	Tax on investment income for 2018 from Part VI, line 5		
þ	Income tax for 2018. (This does not include the tax from Part VI.)		
C	Add lines 2a and 2b	2c	226.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	42,370.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	42,370.
6	Deduction from distributable amount (see instructions)	6	0.
7_	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	42,370.
P	art XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1a	39,351.
Þ	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
а	Suitability test (prior IRS approval required)	3a	
Þ	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	4	39,351.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment		
	income. Enter 1% of Part I, line 27b	5	226.
6	Adjusted qualifying distributions Subtract line 5 from line 4	6	39,125.

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section

Form **990-PF** (2018)

4940(e) reduction of tax in those years.

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Part XIII	Undistributed	Income	(see instructions
I dit Aiii	Ondioth Dated		(see manuchons

1 Distributable amount for 2018 from Part XI, Inter 7 2 Undeschooled roome, it any, as of the level of 5018 center amount for 2017 only b Total for prior years. 3 Excess distributions carryover, if any, to 2018: a From 2019 from 2014 center on 2015 from 2016 center on 2015 from 2016 center on 2016 center on 2016 center on 2016 center on 2016 center on 2016 center on 2017 center on 2016 center on 2017 center on 2017 center on 2017 center on 2017 center on 2017 center on 2017 center on 2018 to 2017, but not more than in the 2 and 2017, but not more than in the 2 and 2017, but not more than in the 2 and 2017, but not more than in the 2 and 2017, but not more than in the 2 and 2017, but not more than in the 2 and 2017, but not more than in the 2 and 2017, but not more than in the 2 and 2017, but not more than in the 2 and 2017, but not more than in the 2 and 2017, but not more than in the 2 and 2017, but not more than in the 2 and 2017, but not more than in the 2 and 2017, but not more than in the 2 and 2017, but not more than in the 2 and 2017, but not more than in the 2 and 2017, but not more than in the 2 and 2017, but not more than in the 2 and 2017, but not more than in the 2 and 2017, but not the 2018 center on 20		(a) Corpus	(b) Years prior to 2017	(c) 2017	(d) 2018
2. Undeschedular Rocents, date, as of the anel of 2016	· ·				12 370
Enter amount for 2017 only 5 Total for prior years: 2 Excess distributions carryover, if any, to 2018: a From 2014 b From 2015 c From 2016 c From 2016 c From 2017 1 Total of lines 3 through 6 Qualifying distributions for 2018 from Part XI, lime 4, ▶ \$ 39, 351. a Applied to 2017, but not more than line 2a Applied to 2018 distribution for 2018 c Freated as distributions out of corpus (Election required - see instructions) C Treated as distributions out of corpus (Election required - see instructions) C Treated as distributions out of corpus (Election required - see instructions) C Treated as distributions out of corpus (Election required - see instructions) C Treated as distributions out of corpus (Election required - see instructions) C Treated as distributions out of corpus (Election required - see instructions) C Treated as distributions out of corpus (Election required - see instructions) C Treated as distributions out of corpus (Election required - see instructions) C Treated as distributions out of corpus (Election required - see instructions) C Treated as distributions out of corpus (Election required - see instructions) C Treated as distributions out of corpus (Election required - see instructions) C Treated as distributions out of corpus (Election required - see instructions) C Treated as distributions out of corpus in the corpus of the corpus	F-				42,370.
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b Excess from 2015 c Excess from 2016 d Excess from 2017	1				
c Excess from 2016 d Excess from 2017					
d Excess from 2017					

823581 12-11-18

2	Information Regarding	a Contribution	Grant, Gift, Loan	. Scholarship.	etc Programs
_	mnormation riegas um		Grant, Girt, Evan	, convidiating,	Cic., riogiania

the foundation makes gifts, grants, etc., to individuals or organizations under other conditions, complete items 2a, b, c, and d.

- a The name, address, and telephone number or email address of the person to whom applications should be addressed:
- b The form in which applications should be submitted and information and materials they should include:
- c Any submission deadlines:
- d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

Form **990-PF** (2018)

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3 Grants and Contributions Paid During th	e Year or Approved for Future	Payment		
Recipient	If recipient is an individual,	Foundation	Purpose of grant or	
Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
INDIANA UNIVERSITY FOUNDATION	N/A	PC		
1500 STATE ROAD 46 BYPASS	()		1	
BLOOMINGTON, IN 47408				
·				
			FUNDING OF ROOT	35,382
			1	
]	
		<u> </u>		
	_ 			
			1	
			1	
			1	
Total		<u> </u>	▶ 3a	35,382,
b Approved for future payment		T	1	
s , pp, eved to total a payment			1	
NONE				
]	
			1	
			1	
		 		
Total			▶ 3b	
TOTAL				0,

BURKE, COSTANZA & CARBERRY LLP, TRUSTEE

Part XVI-A	Ànalysis of Income-Producing Activitie	s
	i manyone or miserine i readening recomme	_

Enter gross amounts unless otherwise indicated.	Unrelate	Unrelated business income		ded by section 512, 513, or 514	(e)	
-	(a) Business code	(b) Amount	Exclu- sion code	(d) Amount	Related or exempt function income	
1 Program service revenue:	Code					
a	- 					
b	1		+			
<u> </u>	1 1					
d	_ [+			
e			-			
g Fees and contracts from government agencies	- 					
	 		- 		·	
2 Membership dues and assessments	-		 			
3 Interest on savings and temporary cash investments						
4 Dividends and interest from securities			14	27,871.		
5 Net rental income or (loss) from real estate:				,	, ,,	
a Debt-financed property						
b Not debt-financed property						
6 Net rental income or (loss) from personal						
property			_]			
7 Other investment income						
8 Gain or (loss) from sales of assets other						
than inventory			14	-528.		
9 Net income or (loss) from special events						
10 Gross profit or (loss) from sales of inventory						
11 Other revenue:			} _			
a	_					
b						
c	1 1					
d	I I					
e						
12 Subtotal. Add columns (b), (d), and (e)		0		27,343.	0.	
13 Total. Add line 12, columns (b), (d), and (e)				13	27,343.	
(See worksheet in line 13 instructions to verify calculations.)	<u></u>	 ·				

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

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

Form **990-PF** (2018)

Form 990-PF (2018) BURKE, COSTANZA & CARBERRY LLP, TRUSTEE 31-6192613 Part XVII Information Regarding Transfers to and Transactions and Relationships With Noncharitable Exempt Organizations

									V	N1 -
1	Did the organization directly or indirectly engage in any of the following with any other organization (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?						tion 501(c)		Yes	NO
					-			,		
а		from the reporting founda	ation to a noncharita	ble exempt orga	anization of:					
	(1) Cash							1a(1)		_ <u>X</u> _
	(2) Other							1a(2)		<u>X</u>
b	Other tran									
		of assets to a noncharitat						1b(1)		<u>X</u>
	• •	nases of assets from a nor		organization				1b(2)		X
	· •	al of facilities, equipment, o						1b(3)		_ <u>X</u> _
		bursement arrangements						1b(4)		X
		s or loan guarantees						1b(5)		_X_
		rmance of services or mei						1b(6)		X
	-	f facilities, equipment, mai	•		-			1 <u>c</u>		X
d		wer to any of the above is							ets,	
		s given by the reporting fo			d less than fair market valu	ue in any transactio	on or sharing arrangei	ment, show in		
		i) the value of the goods, o								
a) Li	ne no	(b) Amount involved	(c) Name of		exempt organization	(d) Description	on of transfers, transactio	ns, and sharing an	angeme	nts
			<u> </u>	N/A		<u> </u>				
							- <u>-</u> -			
										
				_						
						<u> </u>				
						 				
		·								
						 _				
						 				
						<u> </u>				
										
					. <u> </u>	<u> </u>				
			<u> </u>			<u> </u>				
2a		ndation directly or indirect	•	•	or more tax-exempt organi	izations described		 -	_	7
		501(c) (other than section		ection 527?				L Yes	LX	No
_ <u>b</u> _	If "Yes," co	omplete the following sche								
		(a) Name of orga	janization		(b) Type of organization	ļ	(c) Description of re	lationship		
		N/A				<u> </u>				
										
							_			
					 	 				
						L	· _ ·			
	1	penalties of perjury, I declare t elief, it is true, correct, and corr	that I have examined the	is return, including eparer (other than	accompanying schedules and taxpaver) is based on all inform	i statements, and to th nation of Which prepar	e best of my knowledge er has any legowledge	May the IRS		
Sig He	ا ال ا	VIAMM		•		a Larthe	er ot	return with th shown below		
пе	🚩	1000	w_{γ}		(1.15-201		ustee	_ X Yes		No
	Sigi	nature of officer or trustee		Preparer's sig	Date	Title				
		Print/Type preparer's na	ame //	Date		PTIN				
_	:			1///	u Luvly	11-15-19	self- employed			
Pa		MARK T. RO			0)	<u> </u>	<u> </u>	P00361		
	eparer						Firm's EIN ► 3	5-18667	09	
Prepar Use Or	e Only	·								
		Firm's address > 40								
		MI	CHIGAN CI	TY, IN	46360		Phone no. 21	<u>9-874-1</u>		
								Form 99 0)-PF	(2018)

823622 12-11-18

BYRON A. ROOT MEMORIAL TRUST FUND COSTANZA & CARBERRY LLP, TRUSTEE 31-6192613 BURKE Supplementary Information 3a Grants and Contributions Paid During the Year Continuation of Purpose of Grant or Contribution NAME OF RECIPIENT - INDIANA UNIVERSITY FOUNDATION FUNDING OF ROOT SYMPOSIUMS OF GERIATIC ISSUES

FORM 990-PF	DIVIDENDS	AND INTER	EST FROM SECUI	RITIES SI	ATEMENT 1	
GROSS AMOUNT DIVIDEND & INTEREST FROM 1099 27,871 TO PART I, LINE 4 27,871		CAPITAL GAINS DIVIDENDS	REVENUE	(B) NET INVEST- MENT INCOME		
			0. 27,871	27,871.		
			0. 27,871	27,871.		
FORM 990-PF		LEGAL	FEES	នា	PATEMENT 2	
DESCRIPTION		(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
LEGAL FEES - BURKE, COSTANZA & CRANBERRY	LLP	993.	993.		0.	
TO FM 990-PF, PG 1, 1	LN 16A ==	993.	993.		0.	
FORM 990-PF		ACCOUNTI	NG FEES	Si	PATEMENT 3	
DESCRIPTION		(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME		(D) CHARITABLE PURPOSES	
ACCOUNTING FEES - RCC		2,400.	2,400.		0.	
TO FORM 990-PF, PG 1	, LN 16B	2,400.	2,400.		0.	
FORM 990-PF		TAX	ES	STATEMENT 4		
DESCRIPTION		(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FEDERAL TAXES	-	801.	801.		0.	
TO FORM 990-PF, PG 1	, LN 18	801.	801.		0.	

FORM 990-PF	OTHER	INVESTMENTS		STATEMENT	5
DESCRIPTION		VALUATION METHOD	BOOK VALUE	FAIR MARKET	ľ
VECTREN CORP - 5648 SHARES		COST	84,485.		0.
SIMON PROP - 1288 SHARES		COST	75,333.		0.
ONEOK INC NEW - 1970 SHARES		COST	17,350.		0.
NEXTERA ENERGY - 5% 1993 SHARE	S	COST	49,990.		0.
AT&T - 1156 SHARES		COST	40,000.		0.
KINDER MORGAN - 1039 SHARES		COST	40,000.		0.
INVESTMENTS		COST	0.	822,19	3.
TOTAL TO FORM 990-PF, PART II,	LINE	13	307,158.	822,19	 -