

Form **990-PF**Department of the Treasury
Internal Revenue Service**Return of Private Foundation
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.

OMB No 1545-0052

2018

Open to Public Inspection

For calendar year 2018 or tax year beginning , 2018, and ending

RETIREMENT RESEARCH FOUNDATION
8765 WEST HIGGINS ROAD #430
CHICAGO, IL 60631-4170

A Employer identification number
36-2429540

B Telephone number (see instructions)
773-714-8080

C If exemption application is pending, check here ☐ **6**

D 1 Foreign organizations, check here ☐

2 Foreign organizations meeting the 85% test, check here and attach computation ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ☐

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

G Check all that apply ☐ Initial return ☐ Initial return of a former public charity
☐ Final return ☐ Amended return
☐ Address change ☐ Name change

H Check type of organization ☒ Section 501(c)(3) exempt private foundation **04**
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, column (c), line 16)
\$ 136,077,853.

J Accounting method ☐ Cash ☒ Accrual
☐ Other (specify) _____
(Part I, column (d) must be on cash basis)

Part I Analysis of Revenue and Expenses

(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))

(a) Revenue and expenses per books

(b) Net investment income

(c) Adjusted net income

(d) Disbursements for charitable purposes (cash basis only)

Revenue	1	Contributions, gifts, grants, etc., received (attach schedule)				
	2	Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	2,097,828.	2,097,828.		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	7,110,972.			
	b	Gross sales price for all assets on line 6a	7,110,972.			
	7	Capital gain net income (from Part IV, line 2)		7,110,972.		
	8	Net short term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
b	Less Cost of goods sold					
c	Gross profit or (loss) (attach schedule)					
11	Other income (attach schedule)					
SEE STATEMENT 1		825,077.	7,949.			
12	Total Add lines 1 through 11	10,033,877.	9,216,749.	0.		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc.	453,255.	74,124.		379,131.
	14	Other employee salaries and wages	637,372.	18,186.		619,186.
	15	Pension plans, employee benefits	296,783.	19,145.		277,638.
	16a	Legal fees (attach schedule) SEE ST 2	456.			456.
	b	Accounting fees (attach sch) SEE ST 3	33,700.	14,050.		12,100.
	c	Other professional fees (attach sch) SEE ST 4	1,657,199.	1,530,064.		127,135.
	17	Interest	226,715.	226,715.		
	18	Taxes (attach schedule) (see instrs) SEE STM 5	284,808.	56,268.		
	19	Depreciation (attach schedule) and depletion	4,158.	416.		
	20	Occupancy	104,673.	10,467.		94,206.
	21	Travel, conferences, and meetings	54,673.	1,948.		52,725.
	22	Printing and publications	2,071.	207.		1,864.
	23	Other expenses (attach schedule)				
	SEE STATEMENT 6		128,383.	3,314.		125,042.
	24	Total operating and administrative expenses Add lines 13 through 23	3,884,246.	1,954,904.		1,689,483.
25	Contributions, gifts, grants paid PART XV	5,311,299.			4,512,873.	
26	Total expenses and disbursements Add lines 24 and 25	9,195,545.	1,954,904.	0.	6,202,356.	
27	Subtract line 26 from line 12:					
a	Excess of revenue over expenses and disbursements	838,332.				
b	Net investment income (if negative, enter -0-)		7,261,845.			
c	Adjusted net income (if negative, enter -0-)			0.		

Part II Balance Sheets		Beginning of year	End of year	
			(a) Book Value	(b) Book Value
Assets	1 Cash — non-interest-bearing	26,776.	254,362.	254,362.
	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, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach sch) ▶			
	Less allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	174,481.	157,964.	157,964.
	10a Investments — U.S. and state government obligations (attach schedule)			
	b Investments — corporate stock (attach schedule) STATEMENT 7	12,689,729.	19,968,183.	19,968,183.
	c Investments — corporate bonds (attach schedule) STATEMENT 8	4,700,331.	8,077,089.	8,077,089.
	11 Investments — land, buildings, and equipment basis ▶			
Liabilities	Less accumulated depreciation (attach schedule) ▶			
	12 Investments — mortgage loans			
	13 Investments — other (attach schedule) STATEMENT 9	128,874,391.	107,605,023.	107,605,023.
	14 Land, buildings, and equipment basis ▶ 274,208.			
	Less accumulated depreciation (attach schedule) SEE STMT 10 ▶ 258,976.	15,151.	15,232.	15,232.
	15 Other assets (describe ▶)	356.		
	16 Total assets (to be completed by all filers — see the instructions. Also, see page 1, item I)	146,481,215.	136,077,853.	136,077,853.
	17 Accounts payable and accrued expenses	63,830.	145,510.	
	18 Grants payable	2,014,194.	2,812,620.	
	19 Deferred revenue			
Net Assets or Fund Balances	20 Loans from officers, directors, trustees, & other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	2,078,024.	2,958,130.	
	Foundations that follow SFAS 117, check here and complete lines 24 through 26, and lines 30 and 31. <input checked="" type="checkbox"/>			
	24 Unrestricted	144,403,191.	133,119,723.	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. <input type="checkbox"/>			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 Total net assets or fund balances (see instructions)	144,403,191.	133,119,723.	
	31 Total liabilities and net assets/fund balances (see instructions)	146,481,215.	136,077,853.	

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year — Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	144,403,191.
2 Enter amount from Part I, line 27a	2	838,332.
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	145,241,523.
5 Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 11	5	12,121,800.
6 Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30	6	133,119,723.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P — Purchase D — Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)
1 a SEE STATEMENT 12			
b			
c			
d			
e			

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

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss) [If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7]	2	7,110,972.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) See instructions. If (loss), enter -0- in Part I, line 8]	3	0.

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes☒ No

If 'Yes,' the foundation doesn't qualify under section 4940(e) Do not complete this part

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2017	7,413,769.	140,003,872.	0.052954
2016	7,039,621.	131,790,163.	0.053415
2015	6,724,390.	138,014,748.	0.048722
2014	6,521,069.	135,039,258.	0.048290
2013	6,757,283.	125,223,430.	0.053962

2 Total of line 1, column (d)	2	0.257343
3 Average distribution ratio for the 5-year base period — divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years	3	0.051469
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	142,884,944.
5 Multiply line 4 by line 3	5	7,354,145.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	72,618.
7 Add lines 5 and 6	7	7,426,763.
8 Enter qualifying distributions from Part XII, line 4	8	6,206,447.

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

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

1 a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter 'N/A' on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary – see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		1	145,237.
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)		2	0.
3 Add lines 1 and 2		3	145,237.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	145,237.
6 Credits/Payments			
a 2018 estimated tax pmts and 2017 overpayment credited to 2018	6 a	235,300.	
b Exempt foreign organizations – tax withheld at source	6 b		
c Tax paid with application for extension of time to file (Form 8868)	6 c		
d Backup withholding erroneously withheld	6 d		
7 Total credits and payments. Add lines 6a through 6d	7	235,300.	
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> 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	0.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	90,063.	
11 Enter the amount of line 10 to be Credited to 2019 estimated tax 90,063. Refunded	11	0.	

Part VII-A Statements Regarding Activities

	Yes	No
1 a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition		X
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?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation \$ 0. (2) On foundation managers \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If 'Yes,' attach a detailed description of the activities		X
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		X
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	X	
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? If 'Yes,' attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	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	X	
8 a Enter the states to which the foundation reports or with which it is registered. See instructions IL, MI		
b If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If 'No,' attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2018 or the tax year beginning in 2018? See the instructions for Part XIV. If 'Yes,' complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses		X

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Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes,' attach schedule. See instructions	11	X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If 'Yes,' attach statement. See instructions	12	X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <u>HTTP://WWW.RRF.ORG</u>	13	X
14 The books are in care of <u>IRENE FRYE</u> Telephone no <u>773-714-8080</u> Located at <u>8765 W HIGGINS RD., STE 430 CHICAGO IL</u> ZIP + 4 <u>60631</u>		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — check here <u>N/A</u> and enter the amount of tax-exempt interest received or accrued during the year <u>15</u> <u>N/A</u>		
16 At any time during calendar year 2018, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	X
See the instructions for exceptions and filing requirements for FinCEN Form 114. If 'Yes,' enter the name of the foreign country		

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

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

	Yes	No
1 a 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6) Agree to pay money or property to a government official? (Exception. Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is 'Yes' to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions. Organizations relying on a current notice regarding disaster assistance, check here <input type="checkbox"/>	1 b	X
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2018?	1 c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2018? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If 'Yes,' list the years <u>20 __ , 20 __ , 20 __ , 20 __</u>		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer 'No' and attach statement — see instructions.)	2 b	N/A
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here <u>20 __ , 20 __ , 20 __ , 20 __</u>		
3 a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If 'Yes,' did it have excess business holdings in 2018 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2018.)	3 b	N/A
4 a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4 a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2018?	4 b	X

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Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year, did the foundation pay or incur any amount to(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions ☐ Yes ☒ No(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No**b** If any answer is 'Yes' to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructionsOrganizations relying on a current notice regarding disaster assistance, check here ☐**c** If the answer is 'Yes' to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No

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 a personal benefit contract? ☐ Yes ☒ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ Yes ☒ No

If 'Yes' to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No**b** If 'Yes,' did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ Yes ☒ No

N/A

8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remunerationor excess parachute payment(s) during the year? ☐ Yes ☒ No**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors SEE STATEMENT 13**1** List all officers, directors, trustees, and foundation managers and their compensation. See instructions.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 14				
		453,255.	35,138.	1,680.

2 Compensation of five highest-paid employees (other than those included on line 1 – see instructions). If none, enter 'NONE.'

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NANCY ZWEIBEL PHD C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	PROGRAM OFFIC 40	173,785.	26,068.	0.
JULIE KAUFMAN PHD C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	PROGRAM OFFIC 40	158,750.	23,813.	0.
MARY O'DONNELL C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	PROGRAM OFFIC 40	110,607.	16,591.	0.
LEE PARKER MED C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	GRANTS & IT A 40	44,530.	6,680.	0.
MARCIA KUNSTLER C/O RRF 8765 W HIGGINS #430 CHICAGO, 60631 60631	OFFICE ADMINI 40	74,794.	11,219.	0.

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

0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3 Five highest-paid independent contractors for professional services. See instructions. If none, enter 'NONE.'**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
GLOBAL ENDOWMENT MANAGEMENT 100 N TYRON ST CHARLOTTE, NC 28202	INVESTMENT MGMT	1,441,947.
NAOMI M STANHAUS 720 N LARABEE ST., #204 CHICAGO, IL 60654	PROGRAM CONSULTANT	119,760.
MID-CONTINENT CAPITAL 123 N WACKER DR., #1100 CHICAGO, IL 60606	INVESTMENT MGMT	88,117.
Total number of others receiving over \$50,000 for professional services		0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 N/A	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2

	Amount
1 N/A	
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3	0.

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

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a Average monthly fair market value of securities	1 a	144,721,973.
b Average of monthly cash balances	1 b	338,884.
c Fair market value of all other assets (see instructions)	1 c	
d Total (add lines 1a, b, and c)	1 d	145,060,857.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1 e	0.
2 Acquisition indebtedness applicable to line 1 assets	2	0.
3 Subtract line 2 from line 1d	3	145,060,857.
4 Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	2,175,913.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	142,884,944.
6 Minimum investment return. Enter 5% of line 5	6	7,144,247.

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations, check here ☐ and do not complete this part.)

1 Minimum investment return from Part X, line 6		1	7,144,247.
2 a Tax on investment income for 2018 from Part VI, line 5	2 a	145,237.	
b Income tax for 2018 (This does not include the tax from Part VI)	2 b		
c Add lines 2a and 2b	2 c	145,237.	
3 Distributable amount before adjustments. Subtract line 2c from line 1	3	6,999,010.	
4 Recoveries of amounts treated as qualifying distributions	4	112,290.	
5 Add lines 3 and 4	5	7,111,300.	
6 Deduction from distributable amount (see instructions)	6		
7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	7,111,300.	

Part XII Qualifying Distributions (see instructions)

1 Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a Expenses, contributions, gifts, etc. — total from Part I, column (d), line 26	1 a	6,202,356.
b Program-related investments — total from Part IX-B	1 b	
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	4,091.
3 Amounts set aside for specific charitable projects that satisfy the		
a Suitability test (prior IRS approval required)	3 a	
b Cash distribution test (attach the required schedule)	3 b	
4 Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	4	6,206,447.
5 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions	5	
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	6,206,447.

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2017	(c) 2017	(d) 2018
1 Distributable amount for 2018 from Part XI, line 7				7,111,300.
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only			0.	
b Total for prior years. 20 __, 20 __, 20 __		0.		
3 Excess distributions carryover, if any, to 2018				
a From 2013	668,831.			
b From 2014	41,622.			
c From 2015				
d From 2016	357,069.			
e From 2017	492,404.			
f Total of lines 3a through e	1,559,926.			
4 Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ 6,206,447.				
a Applied to 2017, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required — see instructions)		0.		
c Treated as distributions out of corpus (Election required — see instructions)	0.			
d Applied to 2018 distributable amount				6,206,447.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a))	904,853.			904,853.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	655,073.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount — see instructions		0.		
e Undistributed income for 2017 Subtract line 4a from line 2a Taxable amount — see instructions			0.	
f Undistributed income for 2018 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2019				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required — see instructions)	0.			
8 Excess distributions carryover from 2013 not applied on line 5 or line 7 (see instructions)	0.			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	655,073.			
10 Analysis of line 9				
a Excess from 2014				
b Excess from 2015				
c Excess from 2016	162,669.			
d Excess from 2017	492,404.			
e Excess from 2018				

Part XIV	Private Operating Foundations (see instructions and Part VII-A, question 9)
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N/A

- 1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2018, enter the date of the ruling

- b** Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

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

[illegible]

- b 85% of line 2a**

- c** Qualifying distributions from Part XII,
line 4 for each year listed

- d** Amounts included in line 2c not used directly for active conduct of exempt activities

- e Qualifying distributions made directly
for active conduct of exempt activities
Subtract line 2d from line 2c

- 3 Complete 3a, b, or c for the alternative test relied upon

- a 'Assets' alternative test – enter

- (1) Value of all assets**

- (2) Value of assets qualifying under section 4942(j)(3)(B)(i)

- b** 'Endowment' alternative test — enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed

- c 'Support' alternative test – enter:

- (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

- (2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)

- (3) Largest amount of support from an exempt organization

- (4) Gross investment income.

Part XV **Supplementary Information** (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year – see instructions.)

1 Information Regarding Foundation Managers:

- a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2))

NONE

- b** List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

NONE

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc., to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions.

- a The name, address, and telephone number or email address of the person to whom applications should be addressed:

SEE STATEMENT 15

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

SEE STATEMENT FOR LINE 2A

- c** Any submission deadlines

SEE STATEMENT FOR LINE 2A

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

SEE STATEMENT FOR LINE 2A

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<i>a Paid during the year</i>				
GRANTS PAID FOR GENERAL FUNDING	NONE	PC	SEE ATTACHMENT A	4,303,257.
MATCHING GIFTS PROGRAM	NONE	PC	SEE ATTACHMENT C	209,616.
Total				4,512,873.
<i>b Approved for future payment</i>				
GRANTS PAID TO GENERAL FUNDING	NONE	PC	SEE ATTACHMENT B	2,812,620.
Total				2,812,620.

Part XVI-A	Analysis of Income-Producing Activities
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Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
		(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1	Program service revenue					
a						
b						
c						
d						
e						
f						
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	2,097,828.	
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			18	7,110,972.	
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue					
a	<u>K-1 ORDINARY & OTHER INC</u>			14	7,949.	
b	<u>NON-TAXABLE INCOME</u>			14	1,466.	
c	<u>RETURNED GRANTS</u>					112,290.
d	<u>UNRELATED BUSINESS INCOME</u>	523000	703,372.			
e						
12	Subtotal Add columns (b), (d), and (e)		703,372.		9,218,215.	112,290.
13	Total. Add line 12, columns (b), (d), and (e)				13	10,033,877.

(See worksheet in line 13 instructions to verify calculations)

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

RETIREMENT RESEARCH FOUNDATION

36-2429540

STATEMENT 1
FORM 990-PF, PART I, LINE 11
OTHER INCOME

	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
K-1 ORDINARY & OTHER INC	\$ 7,949.	\$ 7,949.	
NON-TAXABLE INCOME	1,466.		
RETURNED GRANTS	112,290.		
UNRELATED BUSINESS INCOME	703,372.		
TOTAL	<u>\$ 825,077.</u>	<u>\$ 7,949.</u>	<u>\$ 0.</u>

STATEMENT 2
FORM 990-PF, PART I, LINE 16A
LEGAL FEES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
GENERAL CORPORATE MATTERS	\$ 456.			\$ 456.
TOTAL	<u>\$ 456.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>	<u>\$ 456.</u>

STATEMENT 3
FORM 990-PF, PART I, LINE 16B
ACCOUNTING FEES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
AUDITING FEES	\$ 15,600.	\$ 4,000.		\$ 10,600.
BOOKKEEPING, PAYROLL, AND TAX SERVICES	18,100.	10,050.		1,500.
TOTAL	<u>\$ 33,700.</u>	<u>\$ 14,050.</u>	<u>\$ 0.</u>	<u>\$ 12,100.</u>

STATEMENT 4
FORM 990-PF, PART I, LINE 16C
OTHER PROFESSIONAL FEES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT MANAGEMENT, GLOBAL ENDOW FD	\$ 1,441,947.	\$ 1,441,947.		
INVESTMENT MANAGEMENT, MID CONTINENT	88,117.	88,117.		
PROGRAM GRANT EVALUATION CONSULTANTS	127,135.			\$ 127,135.
TOTAL	<u>\$ 1,657,199.</u>	<u>\$ 1,530,064.</u>	<u>\$ 0.</u>	<u>\$ 127,135.</u>

RETIREMENT RESEARCH FOUNDATION

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STATEMENT 5
FORM 990-PF, PART I, LINE 18
TAXES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
EXCISE TAX	\$ 145,237.			
FEDERAL INCOME TAX	57,356.			
IL INCOME TAX	25,947.			
TAX ON FOREIGN DIVIDENDS	56,268.	\$ 56,268.		
TOTAL	\$ 284,808.	\$ 56,268.	\$ 0.	\$ 0.

STATEMENT 6
FORM 990-PF, PART I, LINE 23
OTHER EXPENSES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
COMPUTER EXPENSE	\$ 75,218.			\$ 75,218.
DUES & MEMBERSHIPS	12,321.			12,321.
INSURANCE	22,166.	\$ 2,217.		19,949.
OFFICE SUPPLIES & EXPENSE	18,021.	1,031.		16,963.
POSTAGE & SHIPPING	657.	66.		591.
TOTAL	\$ 128,383.	\$ 3,314.	\$ 0.	\$ 125,042.

STATEMENT 7
FORM 990-PF, PART II, LINE 10B
INVESTMENTS - CORPORATE STOCKS

<u>CORPORATE STOCKS</u>	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
MID-CONTINENT CAPITAL - ETF'S	MKT VAL	\$ 19,968,183.	\$ 19,968,183.
	TOTAL	\$ 19,968,183.	\$ 19,968,183.

STATEMENT 8
FORM 990-PF, PART II, LINE 10C
INVESTMENTS - CORPORATE BONDS

<u>CORPORATE BONDS</u>	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
MID-CONTINENT CAPITAL - CORPORATE BONDS	MKT VAL	\$ 8,077,089.	\$ 8,077,089.
	TOTAL	\$ 8,077,089.	\$ 8,077,089.

RETIREMENT RESEARCH FOUNDATION

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STATEMENT 9
FORM 990-PF, PART II, LINE 13
INVESTMENTS - OTHER

	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
<u>OTHER INVESTMENTS</u>			
GLOBAL ENDOWMENT FUND II LP	MKT VAL	\$ 107605023.	\$107,605,023.
	TOTAL	<u>\$ 107605023.</u>	<u>\$107,605,023.</u>

STATEMENT 10
FORM 990-PF, PART II, LINE 14
LAND, BUILDINGS, AND EQUIPMENT

CATEGORY	BASIS	ACCUM. DEPREC.	BOOK VALUE	FAIR MARKET VALUE
FURNITURE AND FIXTURES	\$ 94,186.	\$ 85,745.	\$ 8,441.	\$ 8,440.
MACHINERY AND EQUIPMENT	180,022.	173,231.	6,791.	6,792.
TOTAL	<u>\$ 274,208.</u>	<u>\$ 258,976.</u>	<u>\$ 15,232.</u>	<u>\$ 15,232.</u>

STATEMENT 11
FORM 990-PF, PART III, LINE 5
OTHER DECREASES

NET UNREALIZED GAINS OR LOSSES ON INVESTMENTS	TOTAL	<u>\$ 12,121,800.</u>
		<u>\$ 12,121,800.</u>

STATEMENT 12
FORM 990-PF, PART IV, LINE 1
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

ITEM	(A) DESCRIPTION	(B) HOW ACQUIRED	(C) DATE ACQUIRED	(D) DATE SOLD
1	FROM FORM K-1 GLOBAL ENDOWMENT FUND II	PURCHASED		
2	FROM FORM K-1 GLOBAL ENDOWMENT FUND II	PURCHASED		
3	FROM FORM K-1 GLOBAL ENDOWMENT FUND II	PURCHASED		
4	FROM FORM K-1 GLOBAL ENDOWMENT FUND II	PURCHASED		
5	FROM FORM K-1 GLOBAL ENDOWMENT FUND II	PURCHASED		
6	MANAGED TRADES FROM MCC CAPITAL MGMT	PURCHASED		
7	FROM FORM K-1 GLOBAL ENDOWMENT FUND II	PURCHASED	3/31/2018	9/30/2018
8	FROM FORM K-1 GLOBAL ENDOWMENT FUND II	PURCHASED	3/31/2017	9/30/2018

ITEM	(E) GROSS SALES	(F) DEPREC. ALLOWED	(G) COST BASIS	(H) GAIN (LOSS)	(I) FMV 12/31/69	(J) ADJ. BAS. 12/31/69	(K) EXCESS (I) - (J)	(L) GAIN (LOSS)
1	-685,242.		0.	-685,242.				\$-685,242.
2	3616734.		0.	3616734.				3616734.
3	545,621.		0.	545,621.				545,621.
4	2626513.		0.	2626513.				2626513.
5	-487,828.		0.	-487,828.				-487,828.
6	1006450.		0.	1006450.				1006450.

RETIREMENT RESEARCH FOUNDATION

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STATEMENT 12 (CONTINUED)
FORM 990-PF, PART IV, LINE 1
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

ITEM	(E) GROSS SALES	(F) DEPREC. ALLOWED	(G) COST BASIS	(H) GAIN (LOSS)	(I) FMV 12/31/69	(J) ADJ. BAS. 12/31/69	(K) EXCESS (I) - (J)	(L) GAIN (LOSS)
7	3,945.		0.	3,945.				\$ 3,945.
8	484,779.		0.	484,779.				484,779.
							TOTAL	<u>\$ 7110972.</u>

STATEMENT 13
FORM 990-PF, PART VIII
COMPENSATION EXPLANATION

DOWNEY R VAREY

MR VAREY'S COMPENSATION AS TRUSTEE FOR THE YEAR ENDED 12/31/18 TOTALED \$29,000. MR. VAREY WAS ALSO PAID FOR ACCOUNTING, CONSULTING AND TAX RELATED FEES TOTALING \$10,000 FOR THE YEAR ENDED 12/31/18.

STATEMENT 14
FORM 990-PF, PART VIII, LINE 1
LIST OF OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED	COMPEN- SATION	CONTRI- BUTION TO EBP & DC	EXPENSE ACCOUNT/ OTHER
NATHANIEL MCPARLAND, MD C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	CHAIRMAN 9.00	\$ 8,500.	\$ 0.	\$ 0.
RUTH ANN WATKINS C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	TRUSTEE/CHAIR 9.00	35,000.	0.	0.
MICHAEL J STARSHAK C/O RRF 8765 W HIGGINS CHICAGO, IL 60631	SECRETARY 6.00	29,000.	0.	0.
DOWNEY R VAREY C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	TREASURER 6.00	39,000.	0.	1,680.
IRENE FRYE C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	PRESIDENT 40.00	234,255.	35,138.	0.
MARILYN HENNESSY C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	TRUSTEE 6.00	17,000.	0.	0.

RETIREMENT RESEARCH FOUNDATION

36-2429540

STATEMENT 14 (CONTINUED)
FORM 990-PF, PART VIII, LINE 1
LIST OF OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED	COMPEN- SATION	CONTRI- BUTION TO EBP & DC	EXPENSE ACCOUNT/ OTHER
THOMAS R PROHASKA, PH D C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	TRUSTEE 6.00	\$ 21,500.	\$ 0.	\$ 0.
ANTHONY PERRY C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	TRUSTEE 6.00	11,500.	0.	0.
KATHLEEN W KOLODGY C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	TRUSTEE 6.00	24,500.	0.	0.
THOMAS D KUCZMARSKI C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	TRUSTEE 6.00	21,500.	0.	0.
ADRIENNE MIMS C/O RRF 8765 W HIGGINS #430 CHICAGO, IL 60631	TRUSTEE 6.00	11,500.	0.	0.
TOTAL		\$ 453,255.	\$ 35,138.	\$ 1,680.

STATEMENT 15
FORM 990-PF, PART XV, LINE 2A-D
APPLICATION SUBMISSION INFORMATION

NAME OF GRANT PROGRAM:
NAME: IRENE FRYE, PRESIDENT
CARE OF: RETIREMENT RESEARCH FOUNDATION
STREET ADDRESS: 8765 W HIGGINS ROAD, STE 430
CITY, STATE, ZIP CODE: CHICAGO, IL 60631-4022
TELEPHONE: 773-714-8080
E-MAIL ADDRESS: FRYE@RRF.ORG
FORM AND CONTENT: OUR WEBSITE WWW.RRF.ORG CONTAINS THE FORM IN WHICH APPLICATIONS SHOULD BE SUBMITTED ALONG WITH ELIGIBILITY CRITERIA, EXCLUSIONS, AND LETTERS OF INQUIRY WITH REQUIRED INCLUSIONS. WEB INQUIRIES SHOULD BE ADDRESSED TO INFO@RRF.ORG. APPLICATION FORMS CAN BE DOWNLOADED IN WORD FOR COMPLETION.

SUBMISSION DEADLINES: FEBRUARY 1, MAY 1, AND AUGUST 1
RESTRICTIONS ON AWARDS: OUR WEBSITE WWW.RRF.ORG CONTAINS THE ELIGIBILITY REQUIREMENTS, RESTRICTIONS OR LIMITATIONS FOR ALL MAJOR GRANT PROGRAMS. THE MAJOR GRANT PROGRAMS ARE AS FOLLOWS: ADVOCACY; DIRECT SERVICE; PROFESSIONAL EDUCATION; RESEARCH; ORGANIZATIONAL CAPACITY BUILDING STANDARD GRANTS; ORGANIZATIONAL CAPACITY BUILDING FLEX-FUND GRANTS AND ACCESSIBLE FAITH GRANTS.

Recipient Name and Address	Relationship	Foundation Status of Recipient	Purpose of Grant	Amount
A T Still University of Health Sciences 800 West Jefferson Kirksville, Missouri 63501-1443	NONE	PC	A one-year grant to continue delivering oral health education to older adults and increasing their access to dental care	\$27,635
AgeOptions, Inc 1048 Lake Street, Suite 300 Oak Park, Illinois 60301	NONE	PC	A one- year grant to continue a culturally competent caregiver support program through a network of local churches	\$20,000
AgeOptions, Inc 1048 Lake Street, Suite 300 Oak Park, Illinois 60301	NONE	PC	A one-year grant to build the capacity of Illinois service providers and advocates to ensure that older adults have access to appropriate, affordable healthcare coverage	\$42,500
Aging Care Connections 111 West Harris Avenue La Grange, Illinois 60525	NONE	PC	A one-month matching grant in conjunction with IL Give 2018	\$5,000
Alliance for Aging Research 1700 K Street, NW, Suite 740 Washington, DC 20006	NONE	PC	A one-year grant for 2018 membership support	\$30,000
Alliance for Aging, Inc 760 NW 107th Ave , Suite 214 Miami, Florida 33172-3155	NONE	PC	A one-year grant to deliver the Chronic Disease Self Management Program to Creole-speaking older persons	\$20,000
Alzheimer's & Dementia Alliance of Wisconsin 3330 University Avenue, Suite 300 Madison, Wisconsin 53705-3172	NONE	PC	A second-year grant for three new outreach offices in high need, underserved areas of Wisconsin	\$39,972
American Academy of Home Care Medicine 8735 West Higgins Road, Suite 300 Chicago, Illinois 60631-2738	NONE	PC	A six-month grant to explore a strategic collaboration between AAHCM and the Home Centered Care Institute (HCCI) to strengthen both organizations and improve outcomes for the older people they serve	\$5,000
Antioch Area Healthcare Accessibility Alliance 874 Main Street Antioch, Illinois 60002-1509	NONE	PC	A one-month matching grant in conjunction with IL Give 2018	\$5,000
Arab American Family Services 7000 W 111th Street, Suite 300 Worth, Illinois 60482	NONE	PC	A one-month matching grant in conjunction with IL Give 2018	\$5,000
Argentum Care 1123 Emerson Street, Suite 200 Evanston, Illinois 60201	NONE	PC	A one-year grant for an organizational capacity building project focused on marketing and branding	\$34,800
Argentum Care 1123 Emerson Street, Suite 200 Evanston, Illinois 60201	NONE	PC	A one-month matching grant in conjunction with IL Give 2018	\$5,000
Athens Area Community Foundation P O Box 1543 Athens, Georgia 30603-1543	NONE	PC	A one-year grant for research to study the impact of bereavement on the well-being of older adults in Georgia	\$35,999
Barrington Area Council on Aging 6000 Garlands Lane, Suite 100 Barrington, Illinois 60010	NONE	PC	A one-month matching grant in conjunction with IL Give 2018	\$5,000
Benjamin Rose Institute on Aging 11890 Fairhill Road Cleveland, Ohio 44120-1053	NONE	PC	A 30-month grant to create and market a searchable online resource presenting details about 50 evidence-based dementia caregiving programs to promote their replication and provide families with guidance on where to turn for assistance	\$43,845
Boston College 140 Commonwealth Avenue Chestnut Hill, Massachusetts 02467	NONE	PC	A two-year grant for research to test the efficacy of a memory strategy that capitalizes on socioemotional processing to benefit the late-life learner	\$33,990
Bridges Together, Inc 345 Boston Post Road, Unit H Sudbury, Massachusetts 01776-3033	NONE	PC	A one-year grant to develop an online platform to help organizations working on intergenerational programs learn how to strengthen their work	\$35,000
Candid 32 Old Slip, 24th Floor New York, New York 10005-3500	NONE	PC	A one-year grant for 2018 membership support	\$12,000
Catholic Charities of the Archdiocese of Chicago 721 North LaSalle Street Chicago, Illinois 60654-3503	NONE	PC	A one-month matching grant in conjunction with IL Give 2018	\$5,000
Center for Community Change 1536 U Street NW Washington, DC 20009	NONE	PC	A third-year grant to continue and expand the Leadership Cross-Training Program focusing on issues faced by older residents who own manufactured homes	\$35,000

Recipient Name and Address	Relationship	Foundation Status of Recipient	Purpose of Grant	Amount
Center for Disability and Elder Law, Inc 205 W Randolph, Suite 1610 Chicago, Illinois 60606-1892	NONE	PC	A one-month matching grant in conjunction with IL Give 2018	\$5,000
Center of Concern 1665 Elk Boulevard Des Plaines, Illinois 60016	NONE	PC	A one-month matching grant in conjunction with IL Give 2018	\$5,000
Chicago Public Library Foundation 20 N Michigan Avenue, Suite 520 Chicago, Illinois 60602-4811	NONE	PC	A one-year grant to continue to improve the capacity of the CyberNavigator program to serve older adults better and expand the program to other Chicago Public Library branches	\$35,000
Chinese American Service League, Inc 2141 S Tan Court Chicago, Illinois 60616-1998	NONE	PC	A one-month matching grant in conjunction with IL Give 2018	\$5,000
Chinese Mutual Aid Association 1016 West Argyle Street Chicago, Illinois 60640	NONE	PC	A one-month matching grant in conjunction with IL Give 2018	\$5,000
CJE SeniorLife 3003 W Touhy Avenue Chicago, Illinois 60645-2833	NONE	PC	A one-year grant to update the agency's technology infrastructure to improve organizational efficiency and quality improvement efforts	\$18,000
CJE SeniorLife 3003 W Touhy Avenue Chicago, Illinois 60645-2833	NONE	PC	A second-year grant to continue with a data management project resulting in services that are more strategic and effective	\$48,000
CJE SeniorLife 3003 W Touhy Avenue Chicago, Illinois 60645-2833	NONE	PC	A one-month matching grant in conjunction with IL Give 2018	\$5,000
Coalition of Limited English Speaking Elderly 53 West Jackson Boulevard, Suite 257 Chicago, Illinois 60604-3679	NONE	PC	A one-year grant to continue to strengthen its Language Access Center and expand its language assistance services to Medicare and Medicaid populations in Illinois	\$45,000
Community Adult Day Care 4501 Main Street Downers Grove, Illinois 60515	NONE	PC	A one-month matching grant in conjunction with IL Give 2018	\$5,000
Community Caring Center of Greater Boynton Beach, Inc P O Box 100 Boynton Beach, Florida 33435-3865	NONE	PC	An eight-month grant to address food insecurity and provide home-based support services for low-income seniors	\$37,048
Council on Foundations 1255 23rd Street NW, Suite 200 Washington, DC 20037	NONE	PC	A one-year grant for membership support (\$17,900 will be paid as a grant and \$1,500 will be paid as an administrative expense for a total of \$19,400)	\$17,900
Depression and Bipolar Support Alliance 55 E Jackson Blvd, Suite 490 Chicago, Illinois 60604-4396	NONE	PC	A 15-month grant for a peer-support model to enhance primary care depression treatment for older adults	\$60,000
ElderCARE@ChristChurch 410 Grand Avenue Waukegan, Illinois 60085	NONE	PC	A third-year grant for outreach efforts to help additional older adults with transportation in northern Lake County, Illinois	\$20,824
ElderCARE@ChristChurch 410 Grand Avenue Waukegan, Illinois 60085	NONE	PC	A one-month matching grant in conjunction with IL Give 2018	\$5,000
Elderday Center, Inc 328 W Wilson Street Batavia, Illinois 60510	NONE	PC	A one-month matching grant in conjunction with IL Give 2018	\$5,000
Encore Illinois, NFP 501 W Ogden Avenue, Suite 6 Hinsdale, Illinois 60521	NONE	PC	A one-month matching grant in conjunction with IL Give 2018	\$5,000
Escorted Transportation Service Northwest 1801 W Central Road Arlington Heights, Illinois 60005-2410	NONE	PC	A one-month matching grant in conjunction with IL Give 2018	\$5,000
Family Service Agency of DeKalb County 14 Health Services Drive DeKalb, Illinois 60115	NONE	PC	A one-year grant for a mentoring program pairing volunteers with older adults who have been referred to the counseling center because of isolation and loneliness	\$32,225
Food Research and Action Center 1200 18th Street, NW, Suite 400 Washington, DC 20036	NONE	PC	A one-year grant to increase low-income older adults' access to and participation in the SNAP/Food Stamps program	\$50,000

Recipient Name and Address	Relationship	Foundation Status of Recipient	Purpose of Grant	Amount
Forefront 208 S LaSalle Street, Suite 1540 Chicago, Illinois 60604	NONE	PC	A one-year grant for membership support (\$11,366 will be paid as a grant and \$850 will be paid as an administrative expense for a total of \$12,216)	\$11,366
Generations on Line 1017 Clinton Street Philadelphia, Pennsylvania 19107	NONE	PC	A one-year grant to bring training on touch screen technology and the Internet to low-income seniors in Milwaukee, Kenosha, and Racine	\$15,000
Generations United 80 F Street NW Washington, DC 20001-1522	NONE	PC	Second-year support of a collaborative project, to enhance high-quality intergenerational programs in senior housing communities	\$50,000
Generations United 80 F Street, NW Washington, DC 20001-1522	NONE	PC	Second-year support of a collaborative project, to enhance high-quality intergenerational programs in senior housing communities	\$49,189
Georgia Tech Research Corporation 505 10th Street NW Atlanta, Georgia 30332-0420	NONE	PC	An 18-month grant to test the feasibility of the Everyday Memory and Metacognitive Intervention during the early stages of transitioning from work to retirement, to determine its ability to protect and preserve functioning in the long-term for retirees	\$55,424
Gerontological Society of America 1220 L Street NW Suite 901 Washington DC 20005	NONE	PC	A one-year grant to educate journalists about new scientific findings, social and policy debates, and innovations and solutions for key aging-related issues to better enable them to build awareness among the population at large	\$25,000
Gerontological Society of America 1220 L Street NW, Suite 901 Washington, DC 20005	NONE	PC	A one-month grant to further the inclusion of effective family-centered caregiver support practices and programs within long-term services and supports, enabling low-income older adults and family caregivers to live with dignity and quality of life in the community	\$3,120
Goodwill Industries of North Central Wisconsin, Inc 1800 Appleton Road Menasha, Wisconsin 54952	NONE	PC	A one-year grant to create meaningful opportunities for older adults to participate in the vitality of their neighborhoods through an asset-based, intergenerational approach	\$30,000
Grantmakers in Aging 2001 Jefferson Davis Highway, Suite 1011 Arlington, Virginia 22202	NONE	PC	A four-month grant to support efforts to advance aging-focused philanthropy	\$15,000
Grantmakers in Health 1100 Connecticut Ave NW, Suite 1200 Washington, DC 20036-4110	NONE	PC	A three-month grant to support aging-focused education programs	\$10,000
Grantmakers in Health 1100 Connecticut Ave NW, Suite 1200 Washington, DC 20036-4110	NONE	PC	A one-year grant for 2018 membership support	\$2,875
Greater Green Bay Community Foundation 320 N Broadway, Suite 260 Green Bay, Wisconsin 54303-2705	NONE	PC	A one-year grant to build community-based support and strengthen the organizational capacity of area nonprofits serving aging populations in rural communities	\$10,000
HANA Center 4300 N California Avenue Chicago, Illinois 60618-1514	NONE	PC	A one-month matching grant in conjunction with IL Give 2018	\$5,000
Hanul Family Alliance 5008 North Kedzie Avenue Chicago, Illinois 60625	NONE	PC	A six-month grant to engage a consultant in the development of a preliminary business plan for a fee-for-service arm of the organization's operations	\$5,000
Hanul Family Alliance 5008 North Kedzie Avenue Chicago, Illinois 60625	NONE	PC	A one-month matching grant in conjunction with IL Give 2018	\$5,000
Heart2Heart Senior Outreach of South Florida 2701 West Cypress Creek Road Fort Lauderdale, Florida 33309	NONE	PC	A third-year grant to expand programming to organize volunteers from houses of worship to establish friendships and regular visitation with isolated nursing home residents	\$35,000
Henry J Kaiser Family Foundation 185 Berry Street, Suite 2000 San Francisco, California 94107	NONE	Private Operating Foundation	An 18-month grant for policy research on the potential impact of ACA repeal for older adults	\$57,983
Hope Meadows 1530 Fairway Drive Rantoul, Illinois 61866	NONE	PC	A one-year grant to develop an organizational strategy to address the mounting needs of the community's aging population	\$38,902
Hospice of the Florida Suncoast 5771 Roosevelt Blvd #700 Clearwater, Florida 33760	NONE	PC	A third-year grant to help older patients and their caregivers understand hospice as an option for end-of-life care, and help hospital staff with the logistics of timely referrals to hospice care	\$30,000

Recipient Name and Address	Relationship	Foundation Status of Recipient	Purpose of Grant	Amount
Housing Opportunities and Maintenance for the Elderly 1419 West Carroll Avenue, FL 2 Chicago, Illinois 60607	NONE	PC	A third-year grant to strengthen its program that assists seniors with moving services	\$30,000
Housing Opportunities and Maintenance for the Elderly 1419 West Carroll Avenue, FL 2 Chicago, Illinois 60607	NONE	PC	A one-month matching grant in conjunction with IL Give 2018	\$5,000
Housing Options Provided for the Elderly, Inc 7300 Dartmouth Avenue, Suite 100 University City, Missouri 63130	NONE	PC	A second-year grant to counsel homeowners who have Home Equity Conversion Mortgages that are in arrears	\$25,000
Housing Options Provided for the Elderly, Inc 7300 Dartmouth Avenue, Suite 100 University City, Missouri 63130	NONE	PC	A second-year grant to counsel homeowners who have Home Equity Conversion Mortgages that are in arrears	\$25,000
Illinois Partners for Human Service 33 West Grand Avenue, Suite 300 Chicago, Illinois 60654	NONE	PC	A one-year grant for an organizational capacity building project focused on board development	\$15,000
Illinois Partners for Human Service 33 West Grand Avenue, Suite 300 Chicago, Illinois 60654	NONE	PC	A one-month matching grant in conjunction with IL Give 2018	\$5,000
Independence Health & Therapy 2028 North Seminary Avenue Woodstock, Illinois 60098	NONE	PC	A one-month matching grant in conjunction with IL Give 2018	\$5,000
Indiana University Office of Research Administration 980 Indiana Avenue, Lockefield Village, RM 2232 Indianapolis, Indiana 46202-2915	NONE	PC	A two-year grant to compare the quality of end-of-life care planning in Indiana nursing facilities using and not using the POLST Paradigm	\$50,000
ITNGateway 17 Point West Boulevard, Suite A St. Charles, Missouri 63301	NONE	PC	A one-year grant to expand transportation services to specific areas of St. Louis County	\$39,985
Jane Addams Senior Caucus 1111 N. Wells, Suite 302 Chicago, Illinois 60610-3445	NONE	PC	A two-year grant for local advocacy with the Chicago Housing Authority, to provide Language Access Assistance Services for older CHA tenants with limited proficiency in English	\$25,000
Jane Addams Senior Caucus 1111 N. Wells, Suite 302 Chicago, Illinois 60610-3445	NONE	PC	A six-month grant to engage a consultant who will work to improve the organization's approach to Human Resources, with an emphasis on staffing structure and performance evaluations	\$5,000
Jane Addams Senior Caucus 1111 N. Wells, Suite 302 Chicago, Illinois 60610-3445	NONE	PC	A one-month matching grant in conjunction with IL Give 2018	\$5,000
JourneyCare Foundation 2050 Clare Court Glenview, Illinois 60025-7635	NONE	PC	A 17-month grant to pilot a home-based primary care program for older people with multiple chronic diseases who have difficulty accessing care in traditional office settings	\$37,500
Justice in Aging 1444 Eye Street NW, Suite 1100 Washington, DC 20005	NONE	PC	A one-year grant to decrease improper balance billing and increase access to healthcare for low-income older adults who are dually eligible for Medicare and Medicaid	\$40,000
Justice in Aging 1444 Eye Street NW, Suite 1100 Washington, DC 20005	NONE	PC	A one-year grant to continue advocacy efforts that decrease improper billing and increase access to health care for low income adults who are dually eligible for Medicare and Medicaid	\$40,000
Kenwood Oakland Community Organization 4242 S. Cottage Grove Avenue Chicago, Illinois 60653	NONE	PC	A third-year grant to continue training older residents in low-income housing to advocate for improving the quality and safety of affordable housing units for African American older persons	\$30,000
LAF, dba Legal Aid Chicago 120 S. LaSalle Street, Suite 900 Chicago, Illinois 60603-3425	NONE	PC	A one-year grant to continue to provide free civil legal services to low-income, older people living in Cook County to ensure their financial stability	\$25,000
Latino Alzheimer's and Memory Disorders Alliance 6112 West Cermak Road Cicero, Illinois 60706-1054	NONE	PC	A one-year grant to expand its dementia support programs to Cicero/Berwyn	\$19,687
Latino Alzheimer's and Memory Disorders Alliance 6112 West Cermak Road Cicero, Illinois 60706-1054	NONE	PC	A one-year grant to continue its expansion of dementia care services at the Cicero/Berwyn site	\$39,523
Latino Alzheimer's and Memory Disorders Alliance 6112 West Cermak Road Cicero, Illinois 60706-1054	NONE	PC	A one-month matching grant in conjunction with IL Give 2018	\$5,000

Recipient Name and Address	Relationship	Foundation Status of Recipient	Purpose of Grant	Amount
Legal Aid Society of Palm Beach County, Inc 423 Fern Street, Suite 200 West Palm Beach Florida 33401-5839	NONE	PC	A one-year grant to provide free legal services and education to veterans 65 years and older	\$24,950
Legal Aid Society of Palm Beach County, Inc 423 Fern Street, Suite 200 West Palm Beach, Florida 33401-5839	NONE	PC	A one-year grant to continue providing civil legal services and education to Palm Beach County older veterans in the areas of benefits, justice, and estate planning advocacy	\$25,000
Legal Council for Health Justice 17 N State Street, Suite 900 Chicago, Illinois 60602-3569	NONE	PC	A one-year grant to protect the rights of Illinois' low-income seniors to receive medically necessary care through the Community Care and Long-Term Services and Supports Program	\$25,000
Legal Council for Health Justice 17 N State Street, Suite 900 Chicago, Illinois 60602-3569	NONE	PC	A one-year grant to continue advocacy to protect the rights of seniors receiving Medicaid in Illinois	\$25,000
Life Matters Media, Inc 517 N Racine Avenue, Unit 2 Chicago, Illinois 60642-5894	NONE	PC	A second-year grant to promote advance care planning conversations in Chatham as a model for the Chicago region	\$23,032
Life Matters Media, Inc 517 N Racine Avenue, Unit 2 Chicago, Illinois 60642-5894	NONE	PC	A one-month matching grant in conjunction with IL Give 2018	\$5,000
Lincoln Park Village, Inc 2502 N Clark Street, #225 Chicago Illinois 60614-1850	NONE	PC	A one-year grant to create co-mentoring relationships between older (aged 65+) and younger adults to showcase cross-generational, bi-directional learning	\$50,000
Lincoln Park Village, Inc 2502 N Clark Street, #225 Chicago, Illinois 60614-1850	NONE	PC	A one-month matching grant in conjunction with IL Give 2018	\$5,000
Little Brothers - Friends of the Elderly 355 North Ashland Avenue Chicago, Illinois 60607	NONE	PC	A one-month matching grant in conjunction with IL Give 2018	\$5,000
Little Sisters of the Poor, St Joseph's Home for the Elderly 80 West Northwest Highway Palatine, Illinois 60067-3582	NONE	PC	A one-year grant to launch a Music Therapy Program and to enhance volunteer services for the benefit of low-income older residents of St Joseph's Home for the Elderly	\$38,790
Loyola University of Chicago 820 N Michigan Ave Chicago, Illinois 60611	NONE	PC	A one-year grant to establish a scholarship, to be awarded annually, in the name of Nathaniel McParland, M D	\$75,000
Lutheran Social Services of Northeast Florida, Inc 4615 Phillips Highway Jacksonville, Florida 32207	NONE	PC	A third-year grant to address food insecurity for low-income older adults by providing regularly scheduled food deliveries to nine low-income senior housing facilities	\$18,000
Lyric Opera of Chicago 20 North Wacker Drive, Suite 860 Chicago, Illinois 60606	NONE	PC	A one-year grant to support the free Senior Matinee performance of "Idomeneo" for Chicago seniors	\$7,500
Maplewood Housing for the Visually Impaired dba Friedman Place 5527 N Maplewood Avenue Chicago, Illinois 60625	NONE	PC	A one-year grant to continue support for the Certified Vision Rehabilitation Specialist position	\$18,545
Maplewood Housing for the Visually Impaired dba Friedman Place 5527 N Maplewood Avenue Chicago, Illinois 60625	NONE	PC	A one-month matching grant in conjunction with IL Give 2018	\$5,000
Meals On Wheels Northeastern Illinois 1123 Emerson Street Suite 213 Evanston, Illinois 60201	NONE	PC	A six-month grant for preliminary planning about strategic approaches to meal production to accommodate organizational growth	\$5,000
Meals On Wheels Northeastern Illinois 1123 Emerson Street, Suite 213 Evanston, Illinois 60201	NONE	PC	A one-month matching grant in conjunction with IL Give 2018	\$5,000
Meals On Wheels of Sheboygan County, Inc 1004 S Taylor Drive Sheboygan, Wisconsin 53081-4773	NONE	PC	A one-year grant to implement an inter-professional, holistic approach for in-home assessment of falls, medication risk, and mental health screening for older clients of the Fresh Meals On Wheels Program	\$30,000
Medicare Rights Center 266 West 37th Street, 3rd Floor New York, New York 10018-6609	NONE	PC	A one-year grant, in partnership with Center for Medicare Advocacy, to protect older Americans from erosion of affordable, quality healthcare coverage resulting from proposed changes to the Affordable Care Act, Medicare, and Medicaid	\$45,500
Medicare Rights Center 266 West 37th Street, 3rd Floor New York, New York 10018-6609	NONE	PC	A one-year grant to continue working in partnership with the Center for Medicare Advocacy to protect access to quality healthcare coverage for older Americans	\$46,000

Recipient Name and Address	Relationship	Foundation Status of Recipient	Purpose of Grant	Amount
Memorial Foundation, Inc 3329 Johnson Street Hollywood, Florida 33021	NONE	PC	A third-year grant for the community-based dance, strength training, and boxing programs provided for older persons with Parkinson's disease and their caregivers	\$17,000
Mercy Housing Lakefront 120 S LaSalle Street, Suite 1850 Chicago, Illinois 60603	NONE	PC	A one-month matching grant in conjunction with IL Give 2018	\$5,000
Miami University Office for the Advancement of Research and Scholarship (OARS) 102 Roubush Hall 501 E. High Street Oxford, Ohio 45056	NONE	PC	A one-year grant to examine if the increased presence and level of social workers in skilled nursing facilities improves psychosocial functioning and discharge outcomes	\$49,321
Mid-Florida Area Agency on Aging, Inc. d/b/a Elder Options 100 SW 75th Street Suite 301 Gainesville, Florida 32607	NONE	PC	A one-year grant to plan, develop, and launch a volunteer program to increase programs and services for older adults living in three rural counties	\$34,061
Milwaukee Christian Center, Inc 807 S 14th St Milwaukee, Wisconsin 53204-2104	NONE	PC	A one-year grant to continue adaptation of Stepping On, an evidence-based falls prevention program, for use with Southeast Asian older adults	\$47,500
Naples Senior Center at JFCS 5025 Castello Drive Naples, Florida 34103	NONE	PC	A third-year grant to continue case management services for older adults with dementia and their caregivers	\$26,875
Naples Senior Center at JFCS 5025 Castello Drive Naples, Florida 34103	NONE	PC	A third-year grant to continue case management services for older adults with dementia and their caregivers	\$26,875
National Association of Community Health Centers, Inc 7501 Wisconsin Avenue Suite 1100W Bethesda, Maryland 20814-6593	NONE	PC	A one-year grant to educate and provide technical assistance to engage more Federally Qualified Health Centers to adopt the PACE program to assure integrated care of the growing number of older patients who are low-income and eligible for nursing home care	\$65,675
National Association of Nutrition and Aging Services Programs 1612 K Street NW, Suite #200 Washington, DC 20006	NONE	PC	A one-year grant for a national grassroots advocacy campaign in support of the Congregate Dining Program under the Older Americans Act	\$20,000
National Committee for Responsive Philanthropy 1900 L Street NW Suite 825 Washington, DC 20036	NONE	PC	A one-year grant for 2018 membership support	\$15,000
National Consumer Law Center 7 Winthrop Square Boston, Massachusetts 02110	NONE	PC	A one-year grant for advocacy addressing reverse mortgage foreclosure policies, and to provide technical assistance to legal service attorneys with cases related to reverse mortgage foreclosure	\$25,000
National Consumer Voice for Quality Long-Term Care 1001 Connecticut Avenue NW, Suite 632 Washington, DC 20036-5508	NONE	PC	A one-year grant for advocacy with CMS to provide clarity around expectations regarding closure of nursing homes in terms of the role of state survey agencies in collaboration with partners, sharing of closure plans, and protection of residents' rights throughout the closure and transfer process	\$45,000
National Institute on Retirement Security 1612 K Street NW, Suite 500 Washington, DC 20006	NONE	PC	A six-month grant to measure the economic impacts of retiree expenditures from benefits of defined benefit pension plans	\$23,300
North Shore Senior Center 161 Northfield Road Northfield, Illinois 60093	NONE	PC	A one-year grant to hire a nurse care manager to address complex health-related needs of older adults served by the CareOptions Program	\$25,000
North Shore Senior Center 161 Northfield Road Northfield, Illinois 60093	NONE	PC	A one-month matching grant in conjunction with IL Give 2018	\$5,000
North West Housing Partnership 1701 E Woodfield Road, Suite 203 Schaumburg, Illinois 60173	NONE	PC	A two-year grant to pilot a health-housing strategy by implementing a CAPABLE demonstration in Chicago's northwest suburbs	\$32,665
Northwest Side Housing Center 5233 W Diversey Avenue Chicago, Illinois 60639	NONE	PC	A one-month matching grant in conjunction with IL Give 2018	\$5,000
Northwestern University Office for Sponsored Research (OSR) 750 N Lake Shore Drive, Rubloff 7th Floor Chicago, Illinois 60611	NONE	PC	A two-year grant to study the feasibility of a resistance exercise program targeting frail, home-bound elders	\$44,686

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Northwestern University Office for Sponsored Research (OSR) 750 N Lake Shore Drive, Rubloff 7th Floor Chicago, Illinois 60611	NONE	PC	A one-year grant for a feasibility study to test the impact of emotion regulation training on short-term cognitive function in adults 65 to 80 years old	\$49,956
Northwestern University Office for Sponsored Research (OSR) 750 N Lake Shore Drive, Rubloff 7th Floor Chicago, Illinois 60611	NONE	PC	A two-year grant for research to compare the impact on frailty of a high intensity walking program with a moderate intensity walking program for older residents of an assisted living community	\$53,657
Oak Park River Forest Food Pantry, dba Beyond Hunger 848 Lake Street Oak Park, Illinois 60301	NONE	PC	A one-year grant providing continuation support for a nutrition program targeting low-income, homebound older adults	\$15,000
Oak Park River Forest Food Pantry, dba Beyond Hunger 848 Lake Street Oak Park, Illinois 60301	NONE	PC	A one-month matching grant in conjunction with IL Give 2018	\$5,000
Pension Rights Center 1730 M Street NW, Suite 1000 Washington, DC 20036-4542	NONE	PC	A second-year grant to continue to protect retirees from potential pension benefit reductions and find solutions to save financially distressed multiemployer pension plans	\$30,000
Prairie State Legal Services, Inc 303 North Main Street, Suite 600 Rockford, Illinois 61101	NONE	PC	A one-month matching grant in conjunction with IL Give 2018	\$5,000
Public Interest Law Initiative c/o Foley & Lardner 321 North Clark Street, 28th Floor Chicago, Illinois 60654-4714	NONE	PC	A one-year grant to expand a collaborative project with CDEL, bringing legal services to low-income older adults through law student internships	\$6,600
Racine Kenosha Community Action Agency, Inc 2000 63rd Street Kenosha, Wisconsin 53143	NONE	PC	A second-year grant to increase low-income seniors' access to fresh produce	\$27,000
Revitalize Milwaukee 700 W Virginia Street, Suite 306 Milwaukee, Wisconsin 53204	NONE	PC	A second-year grant to provide housing repairs and other services to low-income older adults who wish to live independently in safety and health	\$20,000
Rush University Medical Center 1645 West Jackson Chicago, Illinois 60612	NONE	PC	A third-year grant supporting a program that facilitates behavior and lifestyle changes among older African American women who are overweight, pre-diabetic, or diabetic	\$50,000
Saint John's Community Care 222 Goethe Ave Collinsville, Illinois 62234-3306	NONE	PC	A one-year grant to launch a program for older adults with early stage dementia and their caregivers	\$30,619
Saint John's Community Care 222 Goethe Ave Collinsville, Illinois 62234-3306	NONE	PC	A one-month matching grant in conjunction with IL Give 2018	\$5,000
SeniorAge Area Agency on Aging 1735 S Fort Avenue Springfield, Missouri 65807-1204	NONE	PC	A one-year grant to implement the evidence-based Stress-Busting Program for caregivers in southwest Missouri	\$27,506
Seniors Assistance Center 7774 W Irving Park Rd Norridge, Illinois 60706	NONE	PC	A six-month grant to engage a consultant as SAC develops a three-year strategic plan	\$4,000
Sinsinawa Dominicans 585 County Road Z Sinsinawa, Wisconsin 53824-9701	NONE	PC	A one-month grant to purchase transport, and install recliner lift chairs and armchairs for older Sisters at St. Dominic Villa	\$24,067
The Arc of the United States 1825 K Street NW, Suite 1200 Washington, DC 20006			A second-year grant to assist elderly caregivers of adult children with intellectual and developmental disabilities	\$32,350
Tides Center PO Box 29907 San Francisco, CA 94129	NONE	PC	A one-year grant to update key information from the Retooling for an Aging America report, originally published by the Institute of Medicine	\$33,500
TimeSlips Creative Storytelling, Inc 4461 N Lake Drive Milwaukee, Wisconsin 53211	NONE	PC	An 18-month grant to design and pilot test an online Learning Center, aimed at expanding access to an innovative model for dementia care	\$58,000
Trustees of Boston University Boston University Grants Receivables P O Box 28763 New York, New York 10087-8763	NONE	PC	A one-year grant to address older adult behavioral health needs through an online training program for senior center staff members	\$58,000

Recipient Name and Address	Relationship	Foundation Status of Recipient	Purpose of Grant	Amount
University of Illinois at Chicago Grants & Contracts 28395 Network Place Chicago, Illinois 60673-1283	NONE	PC	A one-year grant to expand the reach and accessibility of Fit & Strong! by developing a web-based training curriculum for new instructors in partnership with the National Recreation and Parks Association	\$25,000
University of Illinois at Chicago Grants & Contracts 28395 Network Place Chicago, Illinois 60673-1283	NONE	PC	A one-year grant to pilot test a program aimed at helping older adults with intellectual disabilities plan for the future	\$50,000
University of Illinois at Chicago Grants & Contracts 28395 Network Place Chicago, Illinois 60673-1283	NONE	PC	A one-year grant to pilot test a program aimed at helping older adults with intellectual disabilities plan for the future	\$49,026
University of Iowa Division of Sponsored Programs 100 Gilmore Hall 112 N Capitol Street The University of Iowa Iowa City Iowa 52242	NONE	PC	One-year grant to develop and test a digital disaster preparedness program tool that can be used to support older adults in rural settings	\$49,989
University of Iowa Division of Sponsored Programs 100 Gilmore Hall 112 N Capitol Street The University of Iowa Iowa City, Iowa 52242	NONE	PC	A one-year grant to study antecedents, consequences, and patterns of medical cannabis use among older persons	\$69,395
University of Iowa Division of Sponsored Programs 100 Gilmore Hall 112 N Capitol Street The University of Iowa Iowa City Iowa 52242	NONE	PC	An 18-month grant for research to improve the effectiveness of over-the-counter hearing aids	\$57,000
University of Iowa Division of Sponsored Programs 100 Gilmore Hall 112 N Capitol Street The University of Iowa Iowa City, Iowa 52242	NONE	PC	A 17-month grant to conduct a survey of Medicare/Medicaid certified nursing home social service directors to describe this workforce and determine its training needs	\$43,775
University of Massachusetts Boston Office of Research and Sponsored Programs 100 Morrissey Blvd Boston, Massachusetts 02125-3393	NONE	PC	A one-year grant to continue its program to provide pension counseling to Illinois retirees, assisting them to retrieve earned pension benefits, and addressing other pension problems	\$74,000
University of Massachusetts Boston Office of Research and Sponsored Programs 100 Morrissey Blvd Boston, Massachusetts 02125-3393	NONE	PC	A one-year grant to provide pension counseling to older individuals in Illinois	\$67,000
University of Massachusetts Boston Office of Research and Sponsored Programs 100 Morrissey Blvd Boston, Massachusetts 02125-3393	NONE	PC	A three-year grant to build sustainability for the Elder Economic Security Standard Index, a unique, geographically-specific measure of the income required for older people to stay in their homes and remain independent	\$26,497
University of Minnesota Office of Sponsored Projects Administration 450 McNamara Alumni Center 200 Oak Street S E Minneapolis, Minnesota 55455-2070	NONE	PC	A two-year grant to examine barriers to and strong examples of local and state coordination enabling person-centered, long-term services and supports for financially vulnerable older people	\$59,000
University of Minnesota Office of Sponsored Projects Administration 450 McNamara Alumni Center 200 Oak Street S E Minneapolis, Minnesota 55455-2070	NONE	PC	A two-year grant to examine barriers to and strong examples of local and state coordination enabling person-centered, long-term services and supports for financially vulnerable older people	\$50,477
University of South Florida Attn: Research Projects Receivables P O Box 864568 Orlando, Florida 32886-4568	NONE	PC	A two-year grant for pilot research on an intervention to improve older adults' cognitive and motor function	\$43,533
University of South Florida Attn: Research Projects Receivables P O Box 864568 Orlando, Florida 32886-4568	NONE	PC	A two-year grant for pilot research on an intervention to improve older adults' cognitive and motor function	\$43,020

Recipient Name and Address	Relationship	Foundation Status of Recipient	Purpose of Grant	Amount
University of Southern California 3500 S Figueroa Street, Suite 102 Los Angeles, California 90089-8001	NONE	PC	A one-year grant to provide state-specific training and promote advocacy networks to enable available and effective home modification services allowing older adults to age in place	\$30,000
University of Southern California 3500 S Figueroa Street, Suite 102 Los Angeles, California 90089-8001	NONE	PC	A one-year grant to provide state-specific training and promote advocacy networks to enable available and effective home modification services allowing older adults to age in place	\$37,312
University of Washington Office of Sponsored Programs 4333 Brooklyn Avenue NE Box 359472 Seattle, Washington 98195-9472	NONE	PC	A one-year grant to adapt and evaluate a curriculum for occupational therapists to use motivational interviewing in their work to facilitate older adults' management of their own care	\$59,997
Vietnamese Association of Illinois 5110 N Broadway Chicago, Illinois 60640	NONE	PC	One-year grant for a new intensive health case management program	\$22,414
Virginia Polytechnic Institute and State University Office of Sponsored Programs North End Center 300 Turner Street NW Suite 4200 (0170) Blacksburg, Virginia 24060	NONE	PC	An 18-month grant to study the nature, extent, and impact of abuse by perpetrators who are also designated as surrogate decision makers for individuals 65 years and older	\$50,000
White Crane Wellness Center 1657 W Foster Ave Chicago, Illinois 60640-2013	NONE	PC	A second-year grant for a collaborative Falls Prevention Initiative	\$20,000
White Crane Wellness Center 1657 W Foster Ave Chicago, Illinois 60640-2013	NONE	PC	A third-year grant to continue funding collaborative fall prevention programs	\$30,000
Woodstock Institute 67 East Madison Suite 2108 Chicago, Illinois 60603	NONE	PC	A one-year grant to improve access for older people to safe, affordable, convenient, and appropriate financial services and to stop or decrease the harm to older people caused by high-cost, predatory, and/or conflicted financial services	\$15,000
Young Men's Christian Association of the Suncoast, Inc 2469 Enterprise Road Clearwater, Florida 33763	NONE	PC	A one-year grant to expand an arthritis management program	\$15,000
				\$4,303,257

Recipient's Name and Address	Relationship	Foundation Status of Recipient	Purpose of Grant	Schedule Date	Amount
AARP Foundation 601 E Street NW Washington, DC 20049	NONE	PC	An 18-month grant to develop educational videos for informal caregivers who must manage complex medical equipment in caring for older adults	1/15/2019	\$88,375
AARP Foundation 601 E Street NW Washington, DC 20049	NONE	PC	An 18-month grant to develop educational videos for informal caregivers who must manage complex medical equipment in caring for older adults	7/15/2019	\$88,375
AARP Foundation 601 E Street NW Washington, DC 20049	NONE	PC	An 18-month grant to develop educational videos for informal caregivers who must manage complex medical equipment in caring for older adults	1/15/2020	\$88,376
AgeOptions, Inc 1048 Lake Street, Suite 300 Oak Park, Illinois 60301	NONE	PC	A one-year grant for continued support of the Make Medicare Work Coalition (MMW) to help older Illinoisans access affordable healthcare and use their benefits effectively, and to implement the first year of a business plan to sustain MMW	1/15/2019	\$75,000
AgeOptions, Inc 1048 Lake Street, Suite 300 Oak Park, Illinois 60301	NONE	PC	A one-year grant for continued support of the Make Medicare Work Coalition (MMW) to help older Illinoisans access affordable healthcare and use their benefits effectively, and to implement the first year of a business plan to sustain MMW	7/15/2019	\$50,000
Alliance for Aging, Inc 760 NW 107th Ave Suite 214 Miami, Florida 33172-3155	NONE	PC	A one-year grant to deliver the Chronic Disease Self Management Program to Creole-speaking older persons	7/15/2019	\$20,562
Antioch Area Healthcare Accessibility Alliance 874 Main Street Antioch, Illinois 60002-1509	NONE	PC	A second-year grant to increase community-dwelling older adults' access to health-related services	1/15/2019	\$25,000
Benjamin Rose Institute on Aging 11890 Fairhill Road Cleveland Ohio 44120-1053	NONE	PC	A 30-month grant to create and market a searchable online resource presenting details about 50 evidence-based dementia caregiving programs to promote their replication and provide families with guidance on where to turn for assistance	1/15/2019	\$29,417
Boston College 140 Commonwealth Avenue Chestnut Hill, Massachusetts 02467	NONE	PC	A two-year grant for research to test the efficacy of a memory strategy that capitalizes on socioemotional processing to benefit the late-life learner	7/15/2019	\$33,990
Center for Disability and Elder Law, Inc 205 W Randolph, Suite 1610 Chicago, Illinois 60606-1892	NONE	PC	A third-year grant to allow low-income seniors to meet with pro bono legal services in their own community to have their legal issues evaluated and addressed	1/15/2019	\$35,000
Chinese American Service League, Inc 2141 S Tan Court Chicago, Illinois 60616-1998	NONE	PC	A one-year continuation grant to bring an evidence-based exercise program, EnhanceFitness, to elderly Chinese residents	1/15/2019	\$45,000
Chinese Mutual Aid Association 1016 West Argyle Street Chicago, Illinois 60640	NONE	PC	A four-month grant for a collaborative project to build the capacity of private pay, in-home care programs targeting Asian-American older adults in Chicago	1/15/2019	\$39,164
CJE SeniorLife 3003 W Touhy Avenue Chicago, Illinois 60645-2833	NONE	PC	A two-year grant for research to compare the impact on frailty of a high intensity walking program with a moderate intensity walking program for older residents of an assisted living community	1/15/2020	\$37,000
Concordia University Chicago 7400 Augusta Street River Forest, Illinois 60305	NONE	PC	A six-month grant to guide the Center for Gerontology's strategic planning process	1/15/2019	\$21,082
Depression and Bipolar Support Alliance 55 E Jackson Blvd., Suite 490 Chicago, Illinois 60604-4396	NONE	PC	A 15-month grant for a peer-support model to enhance primary care depression treatment for older adults	7/15/2019	\$53,161
Food Research and Action Center 1200 18th Street NW, Suite 400 Washington, DC 20036	NONE	PC	A one-year grant to increase low-income older adults' access to and participation in the SNAP/Food Stamps program	1/15/2019	\$41,570
Greater Chicago Food Depository 4100 W Ann Lane Place Chicago, Illinois 60632	NONE	PC	A five-month grant to conduct a planning project for a prepared meals program for low-income older adults	1/15/2019	\$45,000
Housing Opportunities and Maintenance for the Elderly 1419 West Carroll Avenue, FL 2 Chicago, Illinois 60607	NONE	PC	A one-year grant to partner with Rush University Medical Center to replicate the Community Aging in Place-Advancing Better Living for Elders program (CAPABLE) with clients of H O M E's Upkeep & Repair Service	1/15/2019	\$25,000
Housing Opportunities and Maintenance for the Elderly 1419 West Carroll Avenue, FL 2 Chicago, Illinois 60607	NONE	PC	A one-year grant to partner with Rush University Medical Center to replicate the Community Aging in Place-Advancing Better Living for Elders program (CAPABLE) with clients of H O M E's Upkeep & Repair Service	7/15/2019	\$25,000
Housing Options Provided for the Elderly, Inc 7300 Dartmouth Avenue, Suite 100 University City, Missouri 63130	NONE	PC	A third-year grant to counsel older homeowners who may default on their Home Equity Conversion Mortgage and train 40 additional housing counselors to counsel borrowers who are in arrears	1/15/2019	\$37,500
Housing Options Provided for the Elderly, Inc 7300 Dartmouth Avenue, Suite 100 University City, Missouri 63130	NONE	PC	A third-year grant to counsel older homeowners who may default on their Home Equity Conversion Mortgage and train 40 additional housing counselors to counsel borrowers who are in arrears	7/15/2019	\$37,500
Howard Brown Health 4025 North Shendan Road Chicago, Illinois 60613-2010	NONE	PC	A one-year grant to advance programming for LGBTQ older adults	1/15/2019	\$45,072

Recipient's Name and Address	Relationship	Foundation Status of Recipient	Purpose of Grant	Schedule Date	Amount
Jane Addams Senior Caucus 1111 N Wells, Suite 302 Chicago Illinois 60610-3445	NONE	PC	A two-year grant for local advocacy with the Chicago Housing Authority, to provide Language Access Assistance Services for older CHA tenants with limited proficiency in English	10/15/2019	\$25,000
JourneyCare Foundation 2050 Claire Court Glenview, Illinois 60025-7635	NONE	PC	A 17-month grant to pilot a home-based primary care program for older people with multiple chronic diseases who have difficulty accessing care in traditional office settings	4/15/2019	\$37,500
Justice in Aging 1444 Eye Street NW, Suite 1100 Washington, DC 20005	NONE	PC	A one-year grant to continue advocacy efforts that decrease improper billing and increase access to health care for low income adults who are dually eligible for Medicare and Medicaid	7/15/2019	\$40,000
Legal Aid Society of Palm Beach County, Inc 423 Fern Street, Suite 200 West Palm Beach, Florida 33401-5839	NONE	PC	A one-year grant to continue providing civil legal services and education to Palm Beach County older veterans in the areas of benefits, justice, and estate planning advocacy	4/15/2019	\$25,000
Legal Council for Health Justice 17 N State Street, Suite 900 Chicago, Illinois 60602-3569	NONE	PC	A one-year grant to continue advocacy to protect the rights of seniors receiving Medicaid in Illinois	4/15/2019	\$25,000
Life Matters Media, Inc 517 N Racine Avenue, Unit 2 Chicago, Illinois 60642-5894	NONE	PC	A third-year grant for a project focused on encouraging advance care planning among older adults in the Chatham neighborhood	1/15/2019	\$21,666
Meals On Wheels of Sheboygan County, Inc 1004 S Taylor Drive Sheboygan, Wisconsin 53081-4773	NONE	PC	A one-year grant to implement an inter-professional holistic approach for in-home assessment of falls, medication risk, and mental health screening for older clients of the Fresh Meals On Wheels Program	1/15/2019	\$39,125
Medicare Rights Center 266 West 37th Street, 3rd Floor New York, New York 10018-6609	NONE	PC	A one-year grant to continue working in partnership with the Center for Medicare Advocacy to protect access to quality healthcare coverage for older Americans	1/15/2019	\$46,000
Medicare Rights Center 266 West 37th Street, 3rd Floor New York, New York 10018-6609	NONE	PC	A one-year grant to continue working in partnership with the Center for Medicare Advocacy to protect access to quality healthcare coverage for older Americans	4/15/2019	\$45,500
Mercy Housing Lakefront 120 S LaSalle Street Suite 1850 Chicago, Illinois 60603	NONE	PC	A two-year grant to provide gerontology training to service coordinators and case managers in affordable senior housing to meet the needs of residents who are aging in place	1/15/2019	\$20,750
Mercy Housing Lakefront 120 S LaSalle Street Suite 1850 Chicago, Illinois 60603	NONE	PC	A two-year grant to provide gerontology training to service coordinators and case managers in affordable senior housing, to meet the needs of residents who are aging in place	12/15/2019	\$20,750
Miami University Scripps Gerontology Center 396 Upham Hall 100 Bishop Circle Oxford, Ohio 45056	NONE	PC	An 18-month grant for research to assess 1) how local tax levies that fund services for older adults directly or indirectly affect caregivers' lives, and 2) how these programs could enhance their intentional focus on and effectiveness for caregivers	6/15/2019	\$95,508
Miami University Scripps Gerontology Center 396 Upham Hall 100 Bishop Circle Oxford, Ohio 45056	NONE	PC	An 18-month grant for research to assess 1) how local tax levies that fund services for older adults directly or indirectly affect caregivers' lives, and 2) how these programs could enhance their intentional focus on and effectiveness for caregivers	12/15/2019	\$50,000
Miami University Scripps Gerontology Center 396 Upham Hall 100 Bishop Circle Oxford, Ohio 45056	NONE	PC	An 18-month grant for research to assess 1) how local tax levies that fund services for older adults directly or indirectly affect caregivers' lives, and 2) how these programs could enhance their intentional focus on and effectiveness for caregivers	6/15/2020	\$50,000
National Association of Community Health Centers, Inc 7501 Wisconsin Avenue, Suite 1100W Bethesda Maryland 20814-6593	NONE	PC	A one-year grant to educate and provide technical assistance to engage more Federally Qualified Health Centers to adopt the PACE program to assure integrated care of the growing number of older patients who are low-income and eligible for nursing home care	4/15/2019	\$60,000
National Consumer Law Center 7 Winthrop Square Boston, Massachusetts 02110	NONE	PC	A one-year grant for advocacy addressing reverse mortgage foreclosure policies, and to provide technical assistance to legal service attorneys with cases related to reverse mortgage foreclosure	7/15/2019	\$31,214
National Consumer Voice for Quality Long-Term Care 1001 Connecticut Avenue NW, Suite 632 Washington, DC 20036-5508	NONE	PC	A one-year grant for advocacy with CMS to provide clarity around expectations regarding closure of nursing homes in terms of the role of state survey agencies in collaboration with partners, sharing of closure plans, and protection of residents' rights throughout the closure and transfer process	4/15/2019	\$45,750
North West Housing Partnership 1701 E Woodfield Road, Suite 203 Schaumburg Illinois 60173	NONE	PC	A two-year grant to pilot a health-housing strategy by implementing a CAPABLE demonstration in Chicago's northwest suburbs	7/15/2019	\$40,000
North West Housing Partnership 1701 E Woodfield Road, Suite 203 Schaumburg, Illinois 60173	NONE	PC	A two-year grant to pilot a health-housing strategy by implementing a CAPABLE demonstration in Chicago's northwest suburbs	1/15/2020	\$47,600
Northwestern University Office for Sponsored Research 750 N Lake Shore Drive, Rubloff 7th Floor Chicago, Illinois 60208-0001	NONE	PC	A two-year grant for research to compare the impact on frailty of a high intensity walking program with a moderate intensity walking program for older residents of an assisted living community	4/15/2019	\$70,000
Pension Rights Center 1730 M Street NW, Suite 1000 Washington, DC 20036-4542	NONE	PC	A second-year grant to continue to protect retirees from potential pension benefit reductions and find solutions to save financially distressed multiemployer pension plans	1/15/2019	\$30,000

Recipient's Name and Address	Relationship	Foundation Status of Recipient	Purpose of Grant	Schedule Date	Amount
The Arc of the United States 1825 K Street NW, Suite 1200 Washington, DC 20006	NONE	PC	A third-year grant to continue offering support to older adult caregivers of people with intellectual and developmental disabilities	1/15/2019	\$50,000
The Arc of the United States 1825 K Street NW, Suite 1200 Washington, DC 20006	NONE	PC	A third-year grant to continue offering support to older adult caregivers of people with intellectual and developmental disabilities	7/15/2019	\$22,000
The Chicago School of Professional Psychology 203 N LaSalle Street, Suite 1900 Chicago, Illinois 60601	NONE	PC	A second-year grant for mental health services to low-income senior housing residents who have symptoms of a hoarding disorder	1/15/2019	\$43,000
The Chicago School of Professional Psychology 203 N LaSalle Street, Suite 1900 Chicago, Illinois 60601	NONE	PC	A second-year grant for mental health services to low-income senior housing residents who have symptoms of a hoarding disorder	4/15/2019	\$42,790
TimeSlips Creative Storytelling, Inc 4461 N Lake Drive Milwaukee, Wisconsin 53211	NONE	PC	An 18-month grant to design and pilot test an online Learning Center, aimed at expanding access to an innovative model for dementia care	1/15/2019	\$58,865
Trustees of Boston University Boston University Grants Receivables P O Box 28763 New York, New York 10087-8763	NONE	PC	A one-year grant to address older adult behavioral health needs through an online training program for senior center staff members	1/15/2019	\$57,333
United Cerebral Palsy Seguin of Greater Chicago 3100 South Central Avenue Cicero, Illinois 60804-3956	NONE	PC	A second-year grant to increase the frequency and intensity of nursing care for older group home residents with intellectual or developmental disabilities to promote their independence and enable them to age with dignity	1/15/2019	\$36,400
University of Iowa Division of Sponsored Programs 100 Gilmore Hall 112 N Capitol Street The University of Iowa Iowa City, Iowa 52242	NONE	PC	An 18-month grant for research to improve the effectiveness of over-the-counter hearing aids	1/15/2019	\$57,521
University of Iowa Division of Sponsored Programs 100 Gilmore Hall 112 N Capitol Street The University of Iowa Iowa City Iowa 52242	NONE	PC	A 17-month grant to conduct a survey of Medicare/Medicaid certified nursing home social service directors to describe this workforce and determine its training needs	4/15/2019	\$40,000
University of Massachusetts Boston Office of Research and Sponsored Programs 100 Morrissey Blvd Boston, Massachusetts 02125-3393	NONE	PC	A one-year grant to provide pension counseling to older individuals in Illinois	1/15/2019	\$66,552
University of Massachusetts Boston Office of Research and Sponsored Programs 100 Morrissey Blvd Boston Massachusetts 02125-3393	NONE	PC	A three-year grant to build sustainability for the Elder Economic Security Standard Index, a unique, geographically-specific measure of the income required for older people to stay in their homes and remain independent	4/15/2019	\$26,496
University of Massachusetts Boston Office of Research and Sponsored Programs 100 Morrissey Blvd Boston Massachusetts 02125-3393	NONE	PC	A three-year grant to build sustainability for the Elder Economic Security Standard Index, a unique, geographically-specific measure of the income required for older people to stay in their homes and remain independent	10/15/2019	\$38,791
University of Massachusetts Boston Office of Research and Sponsored Programs 100 Morrissey Blvd Boston, Massachusetts 02125-3393	NONE	PC	A three-year grant to build sustainability for the Elder Economic Security Standard Index, a unique, geographically-specific measure of the income required for older people to stay in their homes and remain independent	4/15/2020	\$38,790
University of Massachusetts Boston Office of Research and Sponsored Programs 100 Morrissey Blvd Boston, Massachusetts 02125-3393	NONE	PC	A three-year grant to build sustainability for the Elder Economic Security Standard Index, a unique, geographically-specific measure of the income required for older people to stay in their homes and remain independent	10/15/2020	\$28,463
University of Massachusetts Boston Office of Research and Sponsored Programs 100 Morrissey Blvd Boston, Massachusetts 02125-3393	NONE	PC	A three-year grant to build sustainability for the Elder Economic Security Standard Index, a unique, geographically-specific measure of the income required for older people to stay in their homes and remain independent	4/15/2021	\$28,463
University of Minnesota Office of Sponsored Projects Administration 450 McNamara Alumni Center 200 Oak Street S E Minneapolis Minnesota 55455-2070	NONE	PC	A two-year grant to examine barriers to and strong examples of local and state coordination enabling person-centered, long-term services and supports for financially vulnerable older people	5/15/2019	\$59,000
University of South Florida Attn: Research Projects Receivables P O Box 864568 Orlando, Florida 32886-4568	NONE	PC	A two-year grant for pilot research on an intervention to improve older adults' cognitive and motor function	4/15/2019	\$44,000
Virginia Commonwealth University 800 E Leigh Street, Suite 3100 P O Box 843039 Richmond, Virginia 23284	NONE	PC	A one-year grant to evaluate the efficacy of a video intervention to disrupt ageism by creating positive changes in attitudes and behaviors about aging among staff working in the continuum of senior residential living	1/15/2019	\$46,034
Virginia Commonwealth University 800 E Leigh Street, Suite 3100 P O Box 843039 Richmond, Virginia 23284	NONE	PC	A one-year grant to evaluate the efficacy of a video intervention to disrupt ageism by creating positive changes in attitudes and behaviors about aging among staff working in the continuum of senior residential living	4/15/2019	\$46,034

Recipient's Name and Address	Relationship	Foundation Status of Recipient	Purpose of Grant	Schedule Date	Amount
Virginia Polytechnic Institute and State University Office of Sponsored Programs North End Center 300 Turner Street NW, Suite 4200 (0170) Blacksburg, Virginia 24060	NONE	PC	An 18-month grant to study the nature, extent, and impact of abuse by perpetrators who are also designated as surrogate decision makers for individuals 65 years and older	4/15/2019	\$54,581
Virginia Polytechnic Institute and State University Office of Sponsored Programs North End Center 300 Turner Street NW, Suite 4200 (0170) Blacksburg, Virginia 24060	NONE	PC	An 18-month grant to study the nature, extent, and impact of abuse by perpetrators who are also designated as surrogate decision makers for individuals 65 years and older	9/30/2019	\$50,000
White Crane Wellness Center 1657 W Foster Ave Chicago, Illinois 60640-2013	NONE	PC	A third-year grant to continue funding collaborative fall prevention programs	4/15/2019	\$25,000
Grand Total					\$2,812,620

Recipient's Name	Address	Relationship	Foundation Status of Recipient	Amount
Lincoln Park Village, Inc	2502 N Clark Street Chicago, IL 60614	NONE	PC	7,500 00
Chicago Public Media, Inc	848 E Grand Avenue Chicago, IL 60611	NONE	PC	600 00
Dominican University	7900 West Division Street River Forest, IL 60305	NONE	PC	7,500 00
Housing Opportunities & Maintenance for the Elderly	1419 W Carroll Avenue, FL 2 Chicago, IL 60607-1149	NONE	PC	150 00
Final Options Illinois	1055 W Bryn Mawr #F212 Chicago, IL 60660	NONE	PC	150 00
Center for Medicare Advocacy, Inc	1025 Connecticut Ave, NW, Ste. 709 Washington, D C 20036	NONE	PC	300 00
Vocel	5317 W Chicago Ave Chicago, IL 60651	NONE	PC	3,750 00
Paho Foundation	2 Ravinia Drive NE, Suite 1540 Atlanta, GA 30346	NONE	PC	375 00
Lions Club International	300 W 22nd Street Oak Brook, IL 60523	NONE	PC	300 00
Northern Illinois Food Bank	273 Dearborn Ct Geneva, IL 60134	NONE	PC	300 00
Wayside Cross Ministries	215 E New York Street Aurora, IL 60505	NONE	PC	300 00
Lincoln Park Village, Inc	2502 N Clark Street Chicago IL 60614	NONE	PC	6,000 00
Freedom Service Dogs of America	2000 W Union Avenue Englewood, CO 80110	NONE	PC	150 00
Shirley Ryan Ability Lab	355 East Ene Street Chicago, IL 60611	NONE	PC	750 00
College of DuPage Foundation	435 Fawell Blvd Glen Ellyn, IL 60137	NONE	PC	600 00
Sinsinawa Dominicans, Inc	585 County Road Z Sinsinawa, WI 53824-9700	NONE	PC	300 00
DuPage Pads	601 West Liberty Wheaton, IL 60187	NONE	PC	300 00
Umoja Student Development Corporation	910 W Van Buren #710 Chicago, IL 60607	NONE	PC	450 00
Deborah's Place	2822 W Jackson Blvd Chicago, IL 60612	NONE	PC	150 00
Free Spirit Media	906 S Homan Ave 5th Floor Chicago, IL 60624	NONE	PC	225 00
Catholic Charities-Archdiocese of Chicago	721 N LaSalle St -4th Floor Chicago, IL 60654-3503	NONE	PC	750 00
Loras College	1450 Alta Vista Street Dubuque, IA 52001	NONE	PC	7,500 00
Sarah's Circle	4838 N Shendan Chicago, IL 60640	NONE	PC	900 00
St Vincent de Paul Regional Seminary	10701 S Military Trail Boynton Beach, FL 33436	NONE	PC	1,200 00
American Occupational Therapy Found	4720 Montgomery Lane, #202 P O Box 31220 Bethesda, MD 20814-1220	NONE	PC	3,000 00
St Luke's Episcopal Church	939 Hinman Avenue Evanston IL 60202	NONE	PC	4,800 00
Little Sisters of the Poor St Joseph's Home for the Elderly	80 W Northwest Hwy Palatine, IL 60067	NONE	PC	150 00
St Philip The Apostle Church	1962 Old Willow Road Northfield, IL 60093	NONE	PC	7,500 00
Little Sisters of the Poor St Joseph's Home for the Elderly	80 W Northwest Hwy Palatine, IL 60067	NONE	PC	100 00
Wildflowers Institute	1144 Pacific Avenue San Francisco, CA 94133-4212	NONE	PC	900 00
St Gabriel Catholic Church	731 N Ocean Blvd Pompano Beach, FL 33062	NONE	PC	900 00
Lincoln Park Village, Inc	2502 N Clark Street Chicago, IL 60614	NONE	PC	6,000 00
Little Sisters of the Poor St Joseph's Home for the Elderly	80 W Northwest Hwy Palatine, IL 60067	NONE	PC	150 00
Pass With Flying Colors	4300 N Knox Avenue Chicago, IL 60641	NONE	PC	1,875 00
Little Sisters of the Poor St Joseph's Home for the Elderly	80 W Northwest Hwy Palatine, IL 60067	NONE	PC	300 00
Chesapeake Bay Retriever Relief & Rescue	P O Box 2187 Poquoson, VA 23662	NONE	PC	150 00
Bethesda Hospital Foundation	2815 S Seacrest Blvd Boynton Beach, FL 33435	NONE	PC	1,200 00
St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	NONE	PC	2,400 00
Bamboo Bend Project Inc	6288 Blad Hill Road Grayling, MI 49738	NONE	PC	150 00
Umoja Student Development Corporation	910 W Van Buren #710 Chicago, IL 60607	NONE	PC	300 00
St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	NONE	PC	2,400 00
University of Chicago	5235 S Harper Ct Suite 450 Chicago, IL 60615	NONE	PC	450 00
University of Chicago	5235 S Harper Ct Suite 450 Chicago, IL 60615	NONE	PC	750 00
Advocate Chantable Foundation	3075 Highland Parkway, #600 Downers Grove, IL 60515	NONE	PC	1,200 00
The Colorado College	14 E Cache LaPoudre St Colorado Springs, CO 80901	NONE	PC	3,000 00
Italian American Human Relations Fnd Chgo	624 N Western Avenue Chicago, IL 60612	NONE	PC	675 00
Little Sisters of the Poor St Joseph's Home for the Elderly	80 W Northwest Hwy Palatine, IL 60067	NONE	PC	1,500 00
SewHope	3828 Brookside Road Toledo, OH 43606	NONE	PC	3,750 00
St Jude Children's Research Hospital	Workplace Giving-ALSAC 501 St Jude Place Memphis, TN 38105	NONE	PC	240 00
Miami University	7 Roudebush Hall 501 E High Street, MSC#1031 Oxford, OH 45056	NONE	PC	7,500 00
Little Brothers-Friends of the Elderly	355 N Ashland Avenue Chicago, IL 60607	NONE	PC	750 00
Chicago Foundation for Women	1 E Wacker Dr , Suite 1620 Chicago, IL 60601	NONE	PC	1,875 00
Naples Senior Center at JFCS Inc Jewish Family & Comm Serv of SW FL	5025 Castello Drnve, #101 Naples, FL 34103	NONE	PC	750 00
Chicago City Day School	541 W Hawthorne Place Chicago, IL 60657	NONE	PC	6,000 00
St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	NONE	PC	4,800 00
Housing Opportunities & Maintenance for the Elderly	1419 W Carroll Avenue, FL 2 Chicago, IL 60607-1149	NONE	PC	1,500 00
YWCA Evanston/North Shore	1215 Church Street Evanston, IL 60201	NONE	PC	300 00
American Cancer Society, Inc	250 Williams Street, 4th Floor Atlanta, GA 30303-1032	NONE	PC	270 00
Support Our Aging Religious, Inc (SOAR)	3025 4th Street, NE Washington, D C 20017	NONE	PC	300 00
Services for Adults Staying in Their Homes	1123 Emerson, #200 Evanston, IL 60201	NONE	PC	750 00
Impact Behavioral Health Partners	2100 Ridge Avenue #G-320 Evanston, IL 60201	NONE	PC	750 00

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Access Living of Metropolitan Chicago	115 W Chicago Avenue Chicago, IL 60654	NONE	PC	1,200 00
American Cancer Society, Inc	250 Williams Street, 4th Floor Atlanta, GA 30303-1032	NONE	PC	150 00
Heartland Community College Fnd	1500 W Raab Road Normal, IL 61761-9921	NONE	PC	2,250 00
Bonnie J Addano Lung Cancer Fnd	1100 Industrial Road, Suite 1 San Carlos, CA 94070	NONE	PC	3,000 00
St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	NONE	PC	4,800 00
Lincoln Park Village, Inc	2502 N Clark Street Chicago, IL 60614	NONE	PC	3,000 00
Lincoln Park Village, Inc	2502 N Clark Street Chicago, IL 60614	NONE	PC	3,000 00
Northern Illinois Food Bank	273 Dearborn Ct Geneva, IL 60134	NONE	PC	180 00
Misencordia Home	6300 North Ridge Chicago, IL 60660	NONE	PC	1,584 63
Catholic Charities-Archdiocese of Chicago	721 N LaSalle St -4th Floor Chicago, IL 60654-3503	NONE	PC	300 00
University of Rochester	P O Box 270032 Rochester, NY 14627-0032	NONE	PC	150 00
Saint Gabriel Church	731 N Ocean Blvd Pompano Beach, FL 33062	NONE	PC	600 00
St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	NONE	PC	4,800 00
Chicago Public Library Foundation	20 N Michigan Ave Suite 520 Chicago, IL 60602	NONE	PC	1,500 00
Lincoln Park Village Inc	2502 N Clark Street Chicago, IL 60614	NONE	PC	750 00
Lifeline Theatre	6912 N Glenwood Chicago, IL 60626	NONE	PC	300 00
St Luke's Episcopal Church	939 Hinman Avenue Evanston, IL 60202	NONE	PC	1,550 01
YWCA Evanston/North Shore	1215 Church Street Evanston, IL 60201	NONE	PC	150 00
The Possibility Project	104 W 27th Street, 12th Floor New York, NY 10001	NONE	PC	1,500 00
Center on Budget and Policy Priorities	820 First Street, NE #510 Washington, D C 20002	NONE	PC	175 00
University of Massachusetts Boston	Office of Research & Spon Programs 100 Morrissey Blvd Boston, MA 02125	NONE	PC	750 00
National Ovarian Cancer Coalition	4900 Hopyard Rd #100 Pleasanton, CA 94588	NONE	PC	375 00
Umoja Student Development Corporation	910 W Van Buren #710 Chicago, IL 60607	NONE	PC	300 00
Chicago Innovation Foundation	2001 N Halsted #201 Chicago, IL 60657	NONE	PC	2,250 00
Lincoln Park Village, Inc	2502 N Clark Street Chicago, IL 60614	NONE	PC	3,000 00
Food Research and Action Center	1200 18th Street, NW Suite 400 Washington, D C 20036	NONE	PC	175 00
Chicago Innovation Foundation	2001 N Halsted #201 Chicago, IL 60657	NONE	PC	2,250 00
Chicago Innovation Foundation	2001 N Halsted #201 Chicago, IL 60657	NONE	PC	750 00
Steuben County Literacy Coalition	1208 South Wayne Street Angola, IN 46703	NONE	PC	300 00
American Academy of Home Care Medicine	8735 West Higgins Rd #300 Chicago, IL 60631	NONE	PC	175 00
Misencordia Home	6300 North Ridge Chicago, IL 60660	NONE	PC	2,400 00
Center for Black Women's Wellness	477 Windsor Street SW, #309 Atlanta, GA 30312	NONE	PC	4,500 00
Final Options Illinois	1055 W Bryn Mawr #F212 Chicago, IL 60660	NONE	PC	150 00
A New Thing Ministries	1683 W Canbaea Trail, #2-B Atlanta, GA 30316	NONE	PC	150 00
Alpha and Omega Society, Inc	P O Box 311644 Atlanta, GA 30331	NONE	PC	300 00
Global Ageing Network	2519 Connecticut Ave NW Washington, D C 20903	NONE	PC	300 00
English Springer Rescue America, Inc	1025 Rose Creek Drive Suite 620 #305 Woodstock, GA 30189	NONE	PC	150 00
The Moody Church	1635 North LaSalle Chicago, IL 60614	NONE	PC	300 00
Dominican University	7900 West Division Street River Forest, IL 60305	NONE	PC	10,500 00
Jewish Home Foundation	1414 N Prospect Ave Milwaukee, WI 53202	NONE	PC	175 00
Rush University Medical Center	Office of Philanthropy 1201 W Harrison Street #300 Chicago, IL 60607	NONE	PC	750 00
Honor Flight	175 S Tuttle Road Springfield, OH 45505	NONE	PC	150 00
Center for Black Women's Wellness	477 Windsor Street SW, #309 Atlanta, GA 30312	NONE	PC	750 00
About-Face Media Literacy, Inc	P O Box 191145 San Francisco, CA 94119	NONE	PC	150 00
Chicago Architecture Foundation	111 E Wacker Drive Chicago, IL 60601	NONE	PC	225 00
Family Matters, Inc	7731 N Marshfield Ave Chicago, IL 60626	NONE	PC	150 99
West Suburban Special Recreation Fnd	2915 Maple Street Franklin Park, IL 60131	NONE	PC	12,000 00
Catholic Charities-Archdiocese of Chicago	721 N LaSalle St -4th Floor Chicago, IL 60654-3503	NONE	PC	600 00
Center for Black Women's Wellness	477 Windsor Street SW, #309 Atlanta, GA 30312	NONE	PC	750 00
The Jane Goodall Institute	1595 Spring Hill Road, #550 Vienna, VA 22182	NONE	PC	150 00
Roger Williams University	One Old Ferry Road Bnslol, RI 03809	NONE	PC	120 00
Greater Chicago Food Depository	4100 W Ann Lane Place Chicago, IL 60632	NONE	PC	300 00
Seraj Library Project	636 North Harvey Oak Park, IL 60302	NONE	PC	750 00
Center for Black Women's Wellness	477 Windsor Street SW, #309 Atlanta, GA 30312	NONE	PC	750 00
Northwest Side Housing Center	5233 W Diversey Chicago, IL 60639	NONE	PC	750 00
Lincoln Park Village, Inc	2502 N Clark Street Chicago, IL 60614	NONE	PC	375 00
United Cerebral Palsy Seguin/Greater Chgo	3100 S Central Avenue Cicero, IL 60804	NONE	PC	150 00
Housing Opportunities & Maintenance for the Elderly	1419 W Carroll Avenue, FL 2 Chicago, IL 60607-1149	NONE	PC	1,500 00
The Posse Foundation	111 W Jackson, Suite 1100 Chicago, IL 60604	NONE	PC	480 00
English at Large	800 W Cummings Park Woburn, MA 01801	NONE	PC	840 00
Free Spirit Media	906 S Homan Ave 5th Floor Chicago, IL 60624	NONE	PC	300 00

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Greater Chicago Food Depository	4100 W Ann Lue Place Chicago, IL 60632	NONE	PC	150 00
American Red Cross	P O Box 37295 Washington, D C 20036	NONE	PC	150 00
Chicago Public Media, Inc	848 E Grand Avenue Chicago, IL 60611	NONE	PC	600 00
Dominican University	7900 West Division Street River Forest, IL 60305	NONE	PC	12,750 00
Art Institute of Chicago	111 S Michigan Avenue Chicago, IL 60603	NONE	PC	450 00
Lydia Home Association	4300 W Irving Park Road Chicago, IL 60634	NONE	PC	450 00
Medicare Rights Center	266 W 37th Street, 3rd Floor New York, NY 10018	NONE	PC	750 00
A New Thing Ministries	1683 W Canbaea Trail, #2-B Atlanta, GA 30316	NONE	PC	750 00
Alpha and Omega Society, Inc	P O Box 311644 Atlanta, GA 30331	NONE	PC	1,500 00
Total Matching Gifts				<u>209,615 63</u>