

Form **990-PF****Return of Private Foundation**

OMB No 1545-0052

Department of the Treasury
Internal Revenue Service

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

2018

Open to Public Inspection

For calendar year 2018 or tax year beginning

, 2018, and ending

, 20

Name of foundation

TRUST FOR THE MEDITATION PROCESS

A Employer identification number

41-6286503

Number and street (or P O box number if mail is not delivered to street address)

Room/suite

B Telephone number (see instructions)

2751 HENNEPIN AVENUE SOUTH

259

(612) 554-7253

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

MINNEAPOLIS, MN 55408

G Check all that apply

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name change

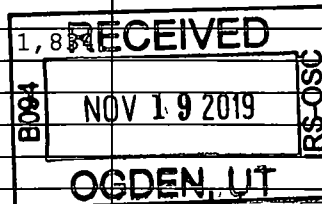
H Check type of organization

☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust☐ Other taxable private foundationI Fair market value of all assets at
end of year (from Part II, col (c), line
16) \$ 4,584,120.J Accounting method ☒ Cash ☐ Accrual
☐ Other (specify) _____

(Part I, column (d) must be on cash basis)

C If exemption application is
pending, check here. ☐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. ☐**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)

| | | | | | |
|-----|---|---------|---------|---|---------|
| 1 | Contributions, gifts, grants, etc., received (attach schedule) | 480,231 | ATCH 1 | | |
| 2 | Check <input type="checkbox"/> if the foundation is not required to attach Sch. B. | | | | |
| 3 | Interest on savings and temporary cash investments | 911 | 911 | | |
| 4 | Dividends and interest from securities | 124,395 | 124,395 | | |
| 5a | Gross rents | | | | |
| b | Net rental income or (loss) | | | | |
| 6a | Net gain or (loss) from sale of assets not on line 10 | 92,431 | | | |
| b | Gross sales price for all assets on line 6a 718,842 | | | | |
| 7 | Capital gain net income (from Part IV, line 2) | | 92,431 | | |
| 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) | | | | |
| 12 | Total. Add lines 1 through 11 | 697,968 | 217,737 | | |
| 13 | Compensation of officers, directors, trustees, etc. . . | 45,475 | | | 45,475 |
| 14 | Other employee salaries and wages | | | | |
| 15 | Pension plans, employee benefits | | | | |
| 16a | Legal fees (attach schedule) ATCH 2 | 1,550 | | | 1,550 |
| b | Accounting fees (attach schedule) ATCH 3 | 4,500 | 2,250 | | 2,250 |
| c | Other professional fees (attach schedule) [4] . . . | 25,985 | 25,985 | | |
| 17 | Interest | | | | |
| 18 | Taxes (attach schedule) (see instructions) [5] . . | 1,834 | 1,834 | | |
| 19 | Depreciation (attach schedule) and depletion . . | | | | |
| 20 | Occupancy | | | | |
| 21 | Travel, conferences, and meetings | 3,551 | | | 3,551 |
| 22 | Printing and publications | 493 | | | 493 |
| 23 | Other expenses (attach schedule) ATCH 6 | 1,412 | | | 1,412 |
| 24 | Total operating and administrative expenses. Add lines 13 through 23. | 84,800 | 30,069 | | 54,731 |
| 25 | Contributions, gifts, grants paid | 225,515 | | | 225,515 |
| 26 | Total expenses and disbursements. Add lines 24 and 25 | 310,315 | 30,069 | 0 | 280,246 |
| 27 | Subtract line 26 from line 12 | | | | |
| a | Excess of revenue over expenses and disbursements | 387,653 | | | |
| b | Net investment income (if negative, enter -0-) | | 187,668 | | |
| c | Adjusted net income (if negative, enter -0-) | | | | |



| Part II Balance Sheets | | Beginning of year (a) Book Value | End of year | |
|-----------------------------|---|-------------------------------------|----------------|-----------------------|
| | | | (b) Book Value | (c) Fair Market Value |
| Assets | 1 Cash - non-interest-bearing | 80,437. | 74,075. | 74,075. |
| | 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 schedule) ▶ Less allowance for doubtful accounts ▶ | | | |
| | 8 Inventories for sale or use. | | | |
| | 9 Prepaid expenses and deferred charges | | | |
| | 10a Investments - U S and state government obligations (attach schedule) . | | | |
| | b Investments - corporate stock (attach schedule) ATCH 7 | 4,070,906. | 4,464,921. | 4,510,045. |
| | c Investments - corporate bonds (attach schedule) | | | |
| | 11 Investments - land, buildings, and equipment basis Less accumulated depreciation (attach schedule) ▶ | | | |
| | 12 Investments - mortgage loans | | | |
| | 13 Investments - other (attach schedule) | | | |
| | 14 Land, buildings, and equipment basis Less accumulated depreciation (attach schedule) ▶ | | | |
| | 15 Other assets (describe ▶) | | | |
| | 16 Total assets (to be completed by all filers - see the instructions Also, see page 1, item I) | 4,151,343. | 4,538,996. | 4,584,120. |
| Liabilities | 17 Accounts payable and accrued expenses | | | |
| | 18 Grants payable | | | |
| | 19 Deferred revenue. | | | |
| | 20 Loans from officers, directors, trustees, and other disqualified persons. . | | | |
| | 21 Mortgages and other notes payable (attach schedule) | | | |
| | 22 Other liabilities (describe ▶) | | | |
| | 23 Total liabilities (add lines 17 through 22) | 0. | 0. | |
| Net Assets or Fund Balances | Foundations that follow SFAS 117, check here . . . ▶ <input type="checkbox"/> and complete lines 24 through 26, and lines 30 and 31. | | | |
| | 24 Unrestricted | | | |
| | 25 Temporarily restricted | | | |
| | 26 Permanently restricted | | | |
| | Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> X and complete lines 27 through 31. | | | |
| | 27 Capital stock, trust principal, or current funds | 4,151,343. | 4,538,996. | |
| | 28 Paid-in or capital surplus, or land, bldg, and equipment fund | | | |
| | 29 Retained earnings, accumulated income, endowment, or other funds . . | | | |
| | 30 Total net assets or fund balances (see instructions) | 4,151,343. | 4,538,996. | |
| | 31 Total liabilities and net assets/fund balances (see instructions) | 4,151,343. | 4,538,996. | |

Part III Analysis of Changes in Net Assets or Fund Balances

| | | |
|---|---|------------|
| 1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return). | 1 | 4,151,343. |
| 2 Enter amount from Part I, line 27a | 2 | 387,653. |
| 3 Other increases not included in line 2 (itemize) ▶ | 3 | |
| 4 Add lines 1, 2, and 3 | 4 | 4,538,996. |
| 5 Decreases not included in line 2 (itemize) ▶ | 5 | |
| 6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 | 6 | 4,538,996. |

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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 PART IV SCHEDULE | | | | | |
| 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 | 92,431. | |
| 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 | 259,663. | 4,394,849. | 0.059083 |
| 2016 | 238,296. | 4,018,679. | 0.059297 |
| 2015 | 274,182. | 4,567,578. | 0.060028 |
| 2014 | 238,275. | 4,711,621. | 0.050572 |
| 2013 | 209,322. | 4,509,399. | 0.046419 |
| 2 Total of line 1, column (d) | | | 2 0.275399 |
| 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 0.055080 |
| 4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5 | | | 4 4,580,793. |
| 5 Multiply line 4 by line 3. | | | 5 252,310. |
| 6 Enter 1% of net investment income (1% of Part I, line 27b). | | | 6 1,877. |
| 7 Add lines 5 and 6. | | | 7 254,187. |
| 8 Enter qualifying distributions from Part XII, line 4 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 | | | 8 280,246. |

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

| | | |
|---|-----------|--------|
| 1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary - see instructions) | 1 | 1,877. |
| b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b | | |
| c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b) | | |
| 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-) | 2 | |
| 3 Add lines 1 and 2 | 3 | 1,877. |
| 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 | 1,877. |
| 6 Credits/Payments | | |
| a 2018 estimated tax payments and 2017 overpayment credited to 2018 | 6a | |
| b Exempt foreign organizations - tax withheld at source | 6b | |
| c Tax paid with application for extension of time to file (Form 8868) | 6c | |
| d Backup withholding erroneously withheld | 6d | |
| 7 Total credits and payments. Add lines 6a through 6d | 7 | 0. |
| 8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached | 8 | 73. |
| 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed | 9 | 1,950. |
| 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid | 10 | |
| 11 Enter the amount of line 10 to be Credited to 2019 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/> 11 | 11 | |

Part VII-A Statements Regarding Activities

| | Yes | No |
|--|-----|----|
| 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? | | X |
| b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition If the answer is "Yes" to 1a or 1b , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities | | X |
| 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 <input type="checkbox"/> \$ _____ (2) On foundation managers <input type="checkbox"/> \$ _____ | | |
| e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____ | | |
| 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 |
| 4a 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 <i>General Instruction T</i> | | 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 | |
| 8a Enter the states to which the foundation reports or with which it is registered. See instructions <input type="checkbox"/> MN, | | |
| 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 <i>General Instruction G</i> ? 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. ATCH 8 | | X |

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 | | 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 | | X |
| 13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address WWW.TRUSTFORMEDITATION.ORG | X | |
| 14 The books are in care of MARTHA BOLINGER Telephone no 612-554-7253 Located at 3125 HOLMES AVE S #301 MINNEAPOLIS, MN ZIP+4 55408 | | |
| 15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year 15 | | |
| 16 At any time during calendar year 2018, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114 If "Yes," enter the name of the foreign country 16 | | X |

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 |
|--|-----|----|
| 1a During the year, did the foundation (either directly or indirectly) | | |
| (1) Engage in the sale or exchange, or leasing of property with a disqualified person? <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 type="checkbox"/> Yes <input checked="" type="checkbox"/> No | | |
| (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" 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"/> 1b | | |
| c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2018? 1c | | 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 2a | | |
| b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions) 2b | | X |
| c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 2c | | |
| 3a 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) 3b | | |
| 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 4a | | 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? 4b | | X |

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

| | | Yes | No |
|-----------|--|---|--|
| 5a | During the year, did the foundation pay or incur any amount to | | |
| (1) | Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |
| (2) | Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |
| (3) | Provide a grant to an individual for travel, study, or other similar purposes? | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |
| (4) | Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> 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? | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |
| b | If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions. | | <input checked="" type="checkbox"/> |
| | Organizations relying on a current notice regarding disaster assistance, check here | | <input type="checkbox"/> |
| 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? | <input checked="" type="checkbox"/> Yes | <input type="checkbox"/> No |
| | 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? | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |
| b | Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? | | <input checked="" type="checkbox"/> |
| | 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? | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |
| b | If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? | | |
| 8 | Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? | <input type="checkbox"/> Yes | <input checked="" type="checkbox"/> No |

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1 List all officers, directors, trustees, and foundation managers and their compensation. 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 |
|----------------------|---|---|---|---------------------------------------|
| ATCH 9 | | 45,475. | 0. | 0. |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

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

| (a) Name and address of each employee paid more than \$50,000 | (b) Title, and average hours per week devoted to position | (c) Compensation | (d) Contributions to employee benefit plans and deferred compensation | (e) Expense account, other allowances |
|---|---|------------------|---|---------------------------------------|
| NONE | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

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

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

| (a) Name and address of each person paid more than \$50,000 | (b) Type of service | (c) Compensation |
|---|---------------------|------------------|
| NONE | | |
| | | |
| | | |
| | | |
| | | |
| | | |

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

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 NONE | |
| | |
| 2 | |
| | |
| All other program-related investments. See instructions. | |
| 3 NONE | |
| | |
| Total. Add lines 1 through 3 ▶ | |

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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 | 1a | 4,511,349. |
| b | Average of monthly cash balances | 1b | 139,202. |
| c | Fair market value of all other assets (see instructions). | 1c | |
| d | Total (add lines 1a, b, and c) | 1d | 4,650,551. |
| e | Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) | 1e | |
| 2 | Acquisition indebtedness applicable to line 1 assets | 2 | |
| 3 | Subtract line 2 from line 1d. | 3 | 4,650,551. |
| 4 | Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions). | 4 | 69,758. |
| 5 | Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 | 5 | 4,580,793. |
| 6 | Minimum investment return. Enter 5% of line 5 | 6 | 229,040. |

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 | 229,040. |
| 2a | Tax on investment income for 2018 from Part VI, line 5 | 2a | 1,877. |
| b | Income tax for 2018 (This does not include the tax from Part VI). | 2b | |
| c | Add lines 2a and 2b. | 2c | 1,877. |
| 3 | Distributable amount before adjustments. Subtract line 2c from line 1. | 3 | 227,163. |
| 4 | Recoveries of amounts treated as qualifying distributions. | 4 | |
| 5 | Add lines 3 and 4 | 5 | 227,163. |
| 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 | 227,163. |

Part XII Qualifying Distributions (see instructions)

| | | | |
|----------|--|-----------|----------|
| 1 | Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes | | |
| a | Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26. | 1a | 280,246. |
| b | Program-related investments - total from Part IX-B. | 1b | |
| 2 | Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes. | 2 | |
| 3 | Amounts set aside for specific charitable projects that satisfy the | | |
| a | Suitability test (prior IRS approval required) | 3a | |
| b | Cash distribution test (attach the required schedule) | 3b | |
| 4 | Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4 | 4 | 280,246. |
| 5 | Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions. | 5 | 1,877. |
| 6 | Adjusted qualifying distributions. Subtract line 5 from line 4 | 6 | 278,369. |

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 | | | | 227,163. |
| 2 Undistributed income, if any, as of the end of 2018 | | | | |
| a Enter amount for 2017 only. | | | | |
| b Total for prior years 20 <u>16</u> , 20 <u>15</u> , 20 <u>14</u> | | | | |
| 3 Excess distributions carryover, if any, to 2018 | | | | |
| a From 2013 | | | | |
| b From 2014 | | | | |
| c From 2015 | | | | 18,911. |
| d From 2016 | | | | 39,498. |
| e From 2017 | | | | 43,429. |
| f Total of lines 3a through e | 101,838. | | | |
| 4 Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ <u>280,246.</u> | | | | |
| a Applied to 2017, but not more than line 2a | | | | |
| b Applied to undistributed income of prior years (Election required - see instructions). | | | | |
| c Treated as distributions out of corpus (Election required - see instructions) | | | | |
| d Applied to 2018 distributable amount. | | | | 227,163. |
| e Remaining amount distributed out of corpus. | 53,083. | | | |
| 5 Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a)) | | | | |
| 6 Enter the net total of each column as indicated below: | | | | |
| a Corpus Add lines 3f, 4c, and 4e Subtract line 5 | 154,921. | | | |
| b Prior years' undistributed income Subtract line 4b from line 2b. | | | | |
| c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed | | | | |
| d Subtract line 6c from line 6b Taxable amount - see instructions | | | | |
| e Undistributed income for 2017 Subtract line 4a from line 2a Taxable amount - see instructions | | | | |
| f Undistributed income for 2018 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2019. | | | | |
| 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions) | | | | |
| 8 Excess distributions carryover from 2013 not applied on line 5 or line 7 (see instructions) | | | | |
| 9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a | 154,921. | | | |
| 10 Analysis of line 9 | | | | |
| a Excess from 2014 | | | | |
| b Excess from 2015 | | | | 18,911. |
| c Excess from 2016 | | | | 39,498. |
| d Excess from 2017 | | | | 43,429. |
| e Excess from 2018 | | | | 53,083. |

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

NOT APPLICABLE

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

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

| | Tax year | | Prior 3 years | | (e) Total |
|--|----------|----------|---------------|----------|-----------|
| | (a) 2018 | (b) 2017 | (c) 2016 | (d) 2015 | |
| 2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed | | | | | |
| 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)(ii) | | | | | |
| (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

ATCH 10

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

c Any submission deadlines

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

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

| <div>Recipient</div> <div>Name and address (home or business)</div> | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|--|---|--------------------------------|----------------------------------|----------|
| a Paid during the year SEE SCHEDULE ATTACHED VARIOUS VARIOUS, MN 55401 | NONE | PC | VARIOUS | 225,515. |
| Total | | | ▶ 3a | 225,515. |
| b Approved for future payment | | | | |
| Total | | | ▶ 3b | |

Part XVI-A Analysis of Income-Producing Activities

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) Exclusion 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 . | | | 14 | 911. | |
| 4 Dividends and interest from securities | | | 14 | 124,395. | |
| 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 | 92,431. | |
| 9 Net income or (loss) from special events . . . | | | | | |
| 10 Gross profit or (loss) from sales of inventory . . | | | | | |
| 11 Other revenue a _____ | | | | | |
| b _____ | | | | | |
| c _____ | | | | | |
| d _____ | | | | | |
| e _____ | | | | | |
| 12 Subtotal Add columns (b), (d), and (e) | | | | 217,737. | |
| 13 Total. Add line 12, columns (b), (d), and (e) | | | | 13 | 217,737. |

(See worksheet in line 13 instructions to verify calculations)

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

[illegible]

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

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule

| (a) Name of organization | (b) Type of organization | (c) Description of relationship |
|--------------------------|--------------------------|---------------------------------|
| | | |
| | | |
| | | |
| | | |
| | | |

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

**Sign
Here**

CAROLE BAKER

Signature of officer or trustee

Date _____

OFFICER

Title

May the IRS discuss this return with the preparer shown below?

See instructions ☒ Yes ☐ No

**Paid
Preparer
Use Only**

Print/Type preparer's name

NANCY S LEHRMAN CPA

Preparer's signature _____

NANCY S LEHRMAN CPA

Date

11/15/2019

| | | | |
|-------|--|--|--|
| Check | | | |
|-------|--|--|--|

9 self-employed

| |
|------|
| PTIN |
|------|

P00160514

Firm's name ► SCHECHTER DOKKEN KANTER

Firm's address ▶ 100 WASHINGTON AVE SO #1600
MINNEAPOLIS, MN

Firm's EIN ▶ 41-1680240

Phone no 612-332-5500

Form **990-PF** (2018)

Schedule of Contributors

OMB No 1545-0047

2018

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.
▶ Go to www.irs.gov/Form990 for the latest information.

Name of the organization
TRUST FOR THE MEDITATION PROCESS

Employer identification number
41-6286503

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

- ☐ 501(c)() (enter number) organization
- ☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
- ☐ 527 political organization

Form 990-PF

- ☒ 501(c)(3) exempt private foundation
- ☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
- ☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000, or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I (entering "N/A" in column (b) instead of the contributor name and address), II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. ▶ \$ _____

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization **TRUST FOR THE MEDITATION PROCESS**Employer identification number
41-6286503**Part I Contributors** (see instructions) Use duplicate copies of Part I if additional space is needed

| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution |
|------------|---|----------------------------|--|
| 1 | C W TAYLOR TRUST C/O UNION BANK & TRUST 312 CENTRAL AVE SE #508 MINNEAPOLIS, MN 55414 | \$ 62,625. | Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions) |
| 2 | C W TAYLOR TRUST C/O UNION BANK & TRUST 312 CENTRAL AVE SE #508 MINNEAPOLIS, MN 55414 | \$ 416,948. | Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions) |
| | | \$ | Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions) |
| | | \$ | Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions) |
| | | \$ | Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions) |
| | | \$ | Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions) |
| | | \$ | Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions) |

| | |
|--------------------------------|------------|
| Employer identification number | 41-6286503 |
|--------------------------------|------------|

[illegible]

Name of organization **TRUST FOR THE MEDITATION PROCESS**

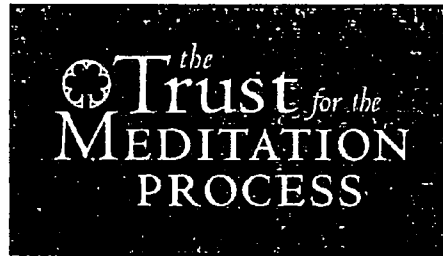
Employer identification number

41-6286503

Part III **Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor.** Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of **\$1,000 or less** for the year (Enter this information once. See instructions) ► \$ _____

Use duplicate copies of Part III if additional space is needed

| (a) No. from Part I | (b) Purpose of gift | (c) Use of gift | (d) Description of how gift is held |
|---|---------------------|--|-------------------------------------|
| 1 | GENERAL | GENERAL | TRUST |
| (e) Transfer of gift | | | |
| Transferee's name, address, and ZIP + 4 | | Relationship of transferor to transferee | |
| C W TAYLOR TRUST | | NONE | |
| (a) No. from Part I | (b) Purpose of gift | (c) Use of gift | (d) Description of how gift is held |
| | | | |
| (e) Transfer of gift | | | |
| Transferee's name, address, and ZIP + 4 | | Relationship of transferor to transferee | |
| | | | |
| (a) No. from Part I | (b) Purpose of gift | (c) Use of gift | (d) Description of how gift is held |
| | | | |
| (e) Transfer of gift | | | |
| Transferee's name, address, and ZIP + 4 | | Relationship of transferor to transferee | |
| | | | |
| (a) No. from Part I | (b) Purpose of gift | (c) Use of gift | (d) Description of how gift is held |
| | | | |
| (e) Transfer of gift | | | |
| Transferee's name, address, and ZIP + 4 | | Relationship of transferor to transferee | |
| | | | |
| (a) No. from Part I | (b) Purpose of gift | (c) Use of gift | (d) Description of how gift is held |
| | | | |
| (e) Transfer of gift | | | |
| Transferee's name, address, and ZIP + 4 | | Relationship of transferor to transferee | |
| | | | |



GRANTS AWARDED 2018

Amherst Wilder Foundation, St. Paul MN

\$5,000 To introduce mindfulness in the Youth Leadership Initiative

Bakken Center for Spirituality and Healing, University of Minnesota, Minneapolis MN

\$30,000 For the Mindfulness in Education Minnesota project

Broken Ground School, Concord NH

\$5,000 For a classroom mindfulness program and a community of practice for teachers

Brown University Watson Institute, Providence RI

\$5,000 For Contemplative Peace-building in Colombia

Center for Community Alternatives, Syracuse NY

\$5,000 For meditation in a community-based alternatives to incarceration program

College of Saint Mary, Omaha NE

\$5,000 For faculty retreats on contemplative practices

Contemplative Outreach, Butler NJ

\$20,000 For website and social media redesign

Contemplative Society, Victoria BC Canada

\$3,000 For a Wisdom School with Matthew Wright

Dakota Children's Advocacy Center, Bismarck ND

\$5,000 For a staff meditation retreat

Emory University Center for Contemplative Science

and Compassion-Based Ethics, Atlanta GA

\$5,000 For a monthly faculty seminar on research in contemplative practices

First Baptist Church in Needham, Needham MA

\$6,700 For a three-part forum on Contemplative Christianity

Flourish Foundation, Ketchum ID

\$5,000 For the Mindful Awareness Program in public schools

Friendship Center of Atlanta at Holy Comforter Church, Atlanta GA

\$1,500 For a mindfulness program in a center for adults with mental health challenges

Garrison Institute, Garrison NY

\$5,000 For retreat scholarships for underserved audiences

Georgetown University, Washington DC

\$25,000 For the first of three years support for the John Main Center

Hyde Park Methodist Church, Tampa FL

\$4,000 For a weekend conference with a nationally recognized speaker

Inner Strength Foundation and Urban Affairs Coalition, Philadelphia PA

\$5,000 To expand the teen mindfulness program into two inner city high schools

Kairos Earth Church of the Woods, Canterbury NH

\$5,000 For the writing and publication of the Contemplative Field Guide to Praying with Creation

Mindful Life Project, Richmond CA

\$5,000 For one year of the Mindful Life Program at a Title One school

Mindful Schools, Emeryville CA

\$15,000 To expand the Mindful Educators network

Next Move, Sacramento CA

\$2,500 For staff mindfulness training in a nonprofit addressing homelessness

Opening Word, Wyandich NY

\$5,000 To introduce mindfulness at an ESL nonprofit for immigrant women

Passionist Earth & Spirit Center, Louisville KY

\$5,000 For the Mindfulness Mentors Program

Pendle Hill, Wallingford PA

\$3,000 For a summer program: Silence, Contemplation and Scripture

Precious Blood Ministry of Reconciliation, Chicago IL
\$5,000 For a meditation room at a center for restorative justice on Chicago's south side

Prison Mindfulness Institute, Providence RI
\$5,000 For five mindfulness initiatives

Shalem Institute for Spiritual Formation, Washington DC
\$5,000 For scholarships for underserved groups to the Soul of Leadership program

Siloam, Philadelphia PA
\$5,000 For 12 half day retreats for folks living with HIV and AIDS

Southern Illinois University, Edwardsville IL
\$4,997 To furnish a mindfulness space and support a weekend retreat

Spirit Mountain Retreat Center, Idyllwild CA
\$2,700 To expand recovery workshops for women veterans

University of New Mexico, Albuquerque NM
\$2,500 For training at the Awareness Training Institute

University of Wyoming, Laramie WY
\$2,000 For a pilot mindfulness meditation course for incarcerated women

Veteran's Path, Mt. Juliet TN
\$5,000 For mindfulness-based 4 month Anchor program in Colorado

Veterans Yoga Project, Alameda CA
\$2,618 For mindfulness sessions at two retreats for Veterans and their families

Wild Goose Festival, Asheville NC
\$5,000 For year one of two years' support for the annual Wisdom Camp

TOTAL \$225,515

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

| Kind of Property | | Description | | | | P or D | Date acquired | Date sold |
|--|---------------------------------------|--|--------------------------|--------------------------------|------------------------------------|--------------|----------------------|------------|
| Gross sale price less expenses of sale | Depreciation allowed/ allowable | Cost or other basis | FMV as of 12/31/69 | Adj basis as of 12/31/69 | Excess of FMV over adj basis | | Gain or (loss) | |
| | | TOTAL CAPITAL GAIN DISTRIBUTIONS | | | | | 52,500. | |
| 25,000. | | RBC CASH 25000 GOLDMAN SACHS BK CD PROPERTY TYPE: SECURITIES 24,998. | | | | D | 01/01/2017 | 07/02/2018 |
| | | | | | | | 2. | |
| 1,376. | | RBC VANGUARD EMERGING MKTS SCH ATTACHED PROPERTY TYPE: SECURITIES 1,017. | | | | P | 12/30/2015 | 12/31/2018 |
| | | | | | | | 359. | |
| 51,200. | | RBC LOOMIS FLOAT SCH ATTACHED PROPERTY TYPE: SECURITIES 54,799. | | | | P | 11/07/2012 | 12/31/2018 |
| | | | | | | | -3,599. | |
| 25,000. | | RBC LOOMIS INVEST 25000 DISCOVER BK GREE PROPERTY TYPE: SECURITIES 25,021. | | | | D | 01/01/2017 | 10/02/2018 |
| | | | | | | | -21. | |
| 3,600. | | RBC LOOMIS INV SCH ATTACHED PROPERTY TYPE: SECURITIES 3,626. | | | | P | 01/01/2017 | 12/31/2018 |
| | | | | | | | -26. | |
| 33,400. | | RBC PARNASUS SCH ATTACHED PROPERTY TYPE: SECURITIES 28,270. | | | | P | 01/01/2017 | 12/31/2018 |
| | | | | | | | 5,130. | |
| 21,290. | | RBC S&P MID CAP SCH ATTACHED PROPERTY TYPE: SECURITIES 15,125. | | | | P | 12/30/2015 | 12/31/2018 |
| | | | | | | | 6,165. | |
| 24,329. | | RBC S&P SMALL CAP SCH ATTACHED PROPERTY TYPE: SECURITIES 15,754. | | | | P | 12/30/2015 | 12/31/2018 |
| | | | | | | | 8,575. | |
| 36,100. | | RBC TEMPLETON SCH ATTACHED PROPERTY TYPE: SECURITIES 38,987. | | | | P | 07/22/2014 | 12/31/2018 |
| | | | | | | | -2,887. | |
| 775. | | RBC VANGUARD REIT SCH ATTACHED PROPERTY TYPE: SECURITIES 769. | | | | P | 12/31/2015 | 12/31/2018 |
| | | | | | | | 6. | |
| 87,100. | | RBC VANGUARD INTL SCH ATTACHED PROPERTY TYPE: SECURITIES 72,488. | | | | P | 12/30/2015 | 12/31/2018 |
| | | | | | | | 14,612. | |
| | | RBC VANGUARD BASIC SCH ATTACHED | | | | D | 01/01/2017 | 12/31/2018 |

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

| Kind of Property | | Description | | | | P or D | Date acquired | Date sold |
|--|---------------------------------------|---------------------------------------|--------------------------|--------------------------------|------------------------------------|--------------|----------------------|-----------|
| Gross sale price less expenses of sale | Depreciation allowed/ allowable | Cost or other basis | FMV as of 12/31/69 | Adj basis as of 12/31/69 | Excess of FMV over adj basis | | Gain or (loss) | |
| 357,172. | | PROPERTY TYPE: SECURITIES 345,557. | | | | | 11,615. | |
| TOTAL GAIN (LOSS) | | | | | | | <u>92,431.</u> | |

FORM 990PF, PART I - CONTRIBUTIONS, GIFTS AND GRANTS RECEIVED

ATTACHMENT 1

| NAME AND ADDRESS | DATE | DIRECT PUBLIC SUPPORT |
|---|------------|-----------------------------|
| C W TAYLOR TRUST C/O UNION BANK & TRUST 312 CENTRAL AVE SE #508 MINNEAPOLIS, MN 55414 | 05/14/2018 | 62,625. |
| C W TAYLOR TRUST C/O UNION BANK & TRUST 312 CENTRAL AVE SE #508 MINNEAPOLIS, MN 55414 | 05/14/2018 | 416,948. |
| MISC CASH CONTRIBUTIONS | 12/31/2018 | 658. |
| TOTAL CONTRIBUTION AMOUNTS | | 480,231. |

ATTACHMENT 2

FORM 990PF, PART I - LEGAL FEES

| <u>DESCRIPTION</u> | <u>REVENUE AND EXPENSES PER BOOKS</u> | <u>NET INVESTMENT INCOME</u> | <u>ADJUSTED NET INCOME</u> | <u>CHARITABLE PURPOSES</u> |
|--------------------|---|--------------------------------------|------------------------------------|--------------------------------|
| LEGAL FEES | 1,550. | | | 1,550. |
| TOTALS | <u>1,550.</u> | | | <u>1,550.</u> |

ATTACHMENT 3

FORM 990PF, PART I - ACCOUNTING FEES

| DESCRIPTION | REVENUE AND EXPENSES PER BOOKS | NET INVESTMENT INCOME | ADJUSTED NET INCOME | CHARITABLE PURPOSES |
|-----------------|---|-----------------------------|---------------------------|------------------------|
| ACCOUNTING FEES | 4,500. | 2,250. | | 2,250. |
| TOTALS | <u>4,500.</u> | <u>2,250.</u> | | <u>2,250.</u> |

FORM 990PF, PART I - OTHER PROFESSIONAL FEES

| DESCRIPTION | REVENUE AND EXPENSES PER BOOKS | NET INVESTMENT INCOME |
|--------------------|---|-----------------------------|
| INVESTMENT ADVISOR | 25,985. | 25,985. |
| TOTALS | 25,985. | 25,985. |

ATTACHMENT 5FORM 990PF, PART I - TAXES

| <u>DESCRIPTION</u> | <u>REVENUE AND EXPENSES PER BOOKS</u> | <u>NET INVESTMENT INCOME</u> |
|--------------------|---|--------------------------------------|
| EXCISE TAX | 1,809. | 1,809. |
| MN FILING FEE | 25. | 25. |
| TOTALS | <u>1,834.</u> | <u>1,834.</u> |

ATTACHMENT 6

FORM 990PF, PART I - OTHER EXPENSES

| DESCRIPTION | REVENUE AND EXPENSES PER BOOKS | CHARITABLE PURPOSES |
|----------------------|---|------------------------|
| OFFICE SUPPLIES | 248. | 248. |
| POSTAGE AND DELIVERY | 557. | 557. |
| WEBSITE AND INTERNET | 505. | 505. |
| TELEPHONE | 102. | 102. |
| TOTALS | <u>1,412.</u> | <u>1,412.</u> |

ATTACHMENT 7FORM 990PF, PART II - CORPORATE STOCK

| <u>DESCRIPTION</u> | <u>ENDING BOOK VALUE</u> | <u>ENDING FMV</u> |
|------------------------------|------------------------------|-----------------------|
| RBC - TEMPLETON | 285,753. | 254,654. |
| RBC - LOOMIS FLOAT | 277,765. | 249,445. |
| RBC - LOOMIS INVESTMENT | 955,543. | 889,889. |
| RBC - PARNASUS | 617,418. | 616,143. |
| RBC - VANGUARD | 610,656. | 730,933. |
| RBC - S&P MID CAP | 198,136. | 215,618. |
| RBC - VANGUARD REIT | 247,887. | 230,152. |
| RBC - VANGUARD INTL | 872,360. | 887,163. |
| RBC - VANGUARD EMERGING MKTS | 210,236. | 228,265. |
| RBC - S&P SMALL CAP | 189,167. | 207,783. |
| TOTALS | <u>4,464,921.</u> | <u>4,510,045.</u> |

FORM 990PF, PART VII-A, LINE 10 - SUBSTANTIAL CONTRIBUTORS

ATTACHMENT 8

NAME AND ADDRESS

C W TAYLOR TRUST C/O UNION BANK & TRUST
312 CENTRAL AVE SE #508
MINNEAPOLIS, MN 55414

C W TAYLOR TRUST C/O UNION BANK & TRUST
312 CENTRAL AVE SE #508
MINNEAPOLIS, MN 55414

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

ATTACHMENT 9

| NAME AND ADDRESS | TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION | COMPENSATION | CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS | EXPENSE ACCT AND OTHER ALLOWANCES |
|--|---|--------------|---|---|
| CAROLE BAKER 2751 HENNEPIN AVENUE SOUTH 259 MINNEAPOLIS, MN 55408 | TRUSTEE | | | |
| HELEN WELTER NOT PROVIDED ST MICHAEL, MN 55376 | TRUSTEE | | | |
| MARTHA BOLINGER 2751 HENNEPIN #259 MINNEAPOLIS, MN 55408 | DIRECTOR 2.00 | 45,475. | | |
| PAUL TAYLOR NOT PROVIDED EDINA, MN 55406 | TRUSTEE | | | |
| DEBORAH CHERNICK NOT PROVIDED ST PAUL, MN 55116 | TRUSTEE | | | |

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

ATTACHMENT 9 (CONT'D)

| NAME AND ADDRESS | TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION | COMPENSATION | CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS | EXPENSE ACCT AND OTHER ALLOWANCES |
|--|---|--------------|---|---|
| MICHAEL LILJA NOT PROVIDED EDINA, MN 55435 | TRUSTEE | | | |
| THOMAS J BUSHLACK PH D NOT PROVIDED ST PAUL, MN 55116 | TRUSTEE | | | |
| ANTHONY (NELSON) COFFEY NOT PROVIDED ST PAUL, MN 55101 | TRUSTEE | | | |
| GRAND TOTALS | | 45,475. | 0. | 0. |

FORM 990PF, PART XV - NAME, ADDRESS AND PHONE FOR APPLICATIONS

M BOLINGER TR FOR MEDITATION PROCES
2751 HENNEPIN AVE S #259
MINNEAPOLIS, MN 55408
612-554-7253

FORM IN WHICH APPLICATION SHOULD BE SUBMITTED AND INFORMATION THEY
SHOULD INCLUDE:

ATTACHMENT

SUBMISSION DEADLINES:

ATTACHMENT

RESTRICTIONS OR LIMITATIONS ON AWARDS:

ATTACHMENT

TRUST FOR THE MEDITATION PROCESS

**REQUIRED STATEMENT UNDER REG. 53.4945-5 (d)
TO MEET THE REQUIREMENTS OF SECTION 4945 (h)
Verification of Expenditure Responsibility**

Grantee: Contemplative Society

Address: PO Box 23031 Cook St.
Victoria British Columbia
Canada V8V 4Z8

Grant Date: 7-17-2018

Grant Amount: US\$3,000

Grant Purpose: For a retreat with the Rev. Matthew Wright

Amounts expended by grantee: US\$3,000
(Based on last report received)

Has the grantee diverted any portion of the funds from the purpose of the grant? **No .**

Dates of any reports received from grantee: **March 2019**

Was any verification of the grantee reports deemed necessary? **No.**

If so, state the date and results of such verification:

BY: Martha Bolinger
TITLE: Director **DATE:** November 6, 2019

This form must be attached to Form 990 until grantee has reported in full on all granted funds.