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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 , 20

Name of foundation JAMES & MARIE MCCURDY FAMILY
LARRY MCCURDY

A Employer identification number
42-6468384

Number and street (or P O box number if mail is not delivered to street address) Room/suite
6729 AUGUSTINE CT

B Telephone number (see instructions)
(641)777-1667

City or town, state or province, country, and ZIP or foreign postal code
JOHNSTON, IA 50131

C If exemption application is pending, check here ▶ ☐

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

D 1 Foreign organizations, check here ▶ ☐
2 Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

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

04

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

I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ $ 2,307,020

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

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))

	Line	Description	(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 ▶ ☒ if the foundation is not required to attach Sch B				
	3	Interest on savings and temporary cash investments	53	53	53	
	4	Dividends and interest from securities	113,522	113,522	113,522	
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	52,295			
	b	Gross sales price for all assets on line 6a 745,965				
	7	Capital gain net income (from Part IV, line 2)		52,295		
	8	Net short-term capital gain			938	
	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	165,870	165,870	114,513	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc				
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule) STM108	1,125	1,125	1,125	
	c	Other professional fees (attach schedule) STM109	21,627	21,627	21,627	
	17	Interest				
	18	Taxes (attach schedule) (see instructions) STM110	2,664	736	736	
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)				
	24	**Total operating and administrative expenses.** Add lines 13 through 23	25,416	23,488	23,488	0
	25	Contributions, gifts, grants paid	126,697			123,887
	26	**Total expenses and disbursements.** Add lines 24 and 25	152,113	23,488	23,488	123,887
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	13,757			
	b	**Net investment income** (if negative, enter -0-)		142,382		
	c	**Adjusted net income** (if negative, enter -0-)			91,025	

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Part II **Balance Sheets** Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)

			Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing	57,899	1,149	1,149
	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) STM137	2,169,742	2,244,225	2,305,871
	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 ▶ STM120)	2,772	3,269	
	16	**Total assets** (to be completed by all filers - see the instructions Also, see page 1, item I)	2,230,413	2,248,643	2,307,020
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable	123,887	126,697	
	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)	123,887	126,697	
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26, and lines 30 and 31.**			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds	2,106,526	2,121,946	
	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)	2,106,526	2,121,946	
	31	**Total liabilities and net assets/fund balances** (see instructions)	2,230,413	2,248,643	

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	2,106,526
2	Enter amount from Part I, line 27a	2	13,757
3	Other increases not included in line 2 (itemize) ▶STM115	3	1,663
4	Add lines 1, 2, and 3	4	2,121,946
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	2,121,946

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)
1a	See STM134			
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	745,965		693,670	52,295
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				52,295
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	52,295
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	938

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

1 Enter the appropriate amount in each column for each year, see the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2017	114,672	2,477,739	0.046281
2016	123,452	2,293,433	0.053828
2015	107,368	2,469,048	0.043486
2014	90,661	2,147,369	0.04222
2013	84,704	1,813,220	0.046715

2 **Total** of line 1, column (d)	2	0.232529
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	0.046506
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	2,533,945
5 Multiply line 4 by line 3	5	117,844
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,424
7 Add lines 5 and 6	7	119,268
8 Enter qualifying distributions from Part XII, line 4	8	123,887

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter ________ (attach copy of letter if necessary-see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ [X] and enter 1% of Part I, line 27b	1	1,424
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	1,424
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	1,424
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 2,000		
d	Backup withholding erroneously withheld — 6d		
7	Total credits and payments Add lines 6a through 6d	7	2,000
8	Enter any **penalty** for underpayment of estimated tax Check here ☐ if Form 2220 is attached	8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	576
11	Enter the amount of line 10 to be **Credited to 2019 estimated tax** ▶ 576 **Refunded** ▶	11	

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition	1b		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?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year **(1)** On the foundation ▶ $ ________ **(2)** On foundation managers ▶ $ ________			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ ________			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities	2		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	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		N/A
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by *General Instruction T*	5		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?	6	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.	7	X	
8a	Enter the states to which the foundation reports or with which it is registered See instructions ▶			
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	8b	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 instructions for Part XIV)? If "Yes," complete Part XIV	9		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		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?	13	X	

Website address ▶ N/A

14 The books are in care of ▶ LARRY MCCURDY Telephone no ▶ 641-777-1667

Located at ▶ 6729 AUGUSTINE CT, JOHNSTON, IA ZIP+4 ▶ 50131

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 |

			Yes	No
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
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? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b	N/A	
	Organizations relying on a current notice regarding disaster assistance, check here ▶ ☐			
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? ☐ Yes ☒ No If "Yes," list the years ▶ ____, ____, ____, ____			
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	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 ▶ ____, ____, ____, ____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2018 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969, **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2018)	3b	N/A	
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

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

			Yes	No
5a	During the year, did the foundation pay or incur any amount to			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No			
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No			
	(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No			
	(4) Provide a grant to an organization other than a charitable, etc, organization described in section 4945(d)(4)(A)? See instructions ☐ Yes ☒ No			
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No			
b	If any answer is "Yes" to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance? See instructions	5b	N/A	
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ 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? ☐ Yes ☒ No			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	6b		X
	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?	7b	N/A	
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? ☐ Yes ☒ 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
JANICE ESPY P O BOX 820, FAIRFIELD, IA 52556	TRUSTEE 0.00	0	0	0
MATTHEW CARRIKER 801 FOX RUN DRIVE, IA 52577	TRUSTEE 0.00	0	0	0
LARRY MCCURDY 6729 AUGUSTINE CT, JOHNSTON, IA 50131	TRUSTEE 1.00	0	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 ▶ 0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)*

3 Five highest-paid independent contractors for professional services. See instructions. If none, enter "NONE."

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over $50,000 for professional services ▶		

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 SEE PART XV FOR CONTRIBUTIONS PAID.CONTRIBUTIONS MADE ONLY TO NON PROFIT EDUCATIONAL AND CHARITABLE ORGANIZATIONS.	0
2	
3	
4	

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

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

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	2,530,978
b	Average of monthly cash balances	1b	41,555
c	Fair market value of all other assets (see instructions)	1c	0
d	**Total** (add lines 1a, b, and c)	1d	2,572,533
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	0
3	Subtract line 2 from line 1d	3	2,572,533
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	38,588
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	2,533,945
6	**Minimum investment return.** Enter 5% of line 5	6	126,697

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	126,697
2a	Tax on investment income for 2018 from Part VI, line 5	2a	1,424		
b	Income tax for 2018 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	1,424
3	Distributable amount before adjustments Subtract line 2c from line 1			3	125,273
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	125,273
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	125,273

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	123,887
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	123,887
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	1,424
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	122,463

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				125,273
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only			121,959	
b Total for prior years ______, ______, ______				
3 Excess distributions carryover, if any, to 2018:				
a From 2013				
b From 2014				
c From 2015				
d From 2016				
e From 2017				
f **Total** of lines 3a through e				
4 Qualifying distributions for 2018 from Part XII, line 4 ► $ 123,887				
a Applied to 2017, but not more than line 2a			121,959	
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				
e Remaining amount distributed out of corpus				
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				
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				125,273
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				
10 Analysis of line 9				
a Excess from 2014				
b Excess from 2015				
c Excess from 2016				
d Excess from 2017				
e Excess from 2018				

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

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

b Check box to indicate whether the 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		N/A			
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 ▶ [X] 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

N/A

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

c Any submission deadlines

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

Part XV Supplementary Information *(continued)*

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient 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
a *Paid during the year*				
SEE ATTACHED			SEE ATTACHED	123,887
Total ▶ 3a				123,887
b *Approved for future payment*				
SEE ATTACHED			SEE ATTACHED	0
Total ▶ 3b				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income (See instructions)
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	53	
4 Dividends and interest from securities			14	113,522	
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					
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)				113,575	

13 **Total.** Add line 12, columns (b), (d), and (e) . . . 13 113,575

(See worksheet in line 13 instructions to verify calculations)

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

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

Part XVII **Information Regarding Transfers to and Transactions and Relationships With Noncharitable Exempt Organizations**

			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

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
		N/A	

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
N/A		

Sign Here

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

LARRY MCCURDY Larry McCurdy | 11/14/19 | TRUSTEE

Signature of officer or trustee | Date | 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	Preparer's signature	Date	Check ☐ if self-employed	PTIN
CHUCK C CONVERSE	Chuck C. Converse	11-14-19		P00026443
Firm's name ▶ HUNT & ASSOCIATES P C			Firm's EIN ▶ 42-1395096	
Firm's address ▶ 1201 HIGH AVE WEST OSKALOOSA IA 52577			Phone no 641-672-2541	

Name(s) as shown on return: JAMES & MARIE MCCURDY FAMILY

Tax ID Number: 42-6468384

FORM 990PF - PART III - LINE 3
OTHER INCREASES SCHEDULE

STATEMENT #115

NON DIVIDEND DISTRIBUTION	1,663
TOTAL	1,663

PG01

FORM 990PF - PART II - LINE 15
OTHER ASSETS SCHEDULE

STATEMENT #120

DESCRIPTION	BOY BOOK	EOY BOOK	FMV
CORP DIVIDEND RECEIVABLE	2,772	3,269	
TOTAL	2,772	3,269	

PG01

FORM 990PF - PART II - LINE 10(B)
INVESTMENTS: CORPORATE STOCK SCHEDULE

STATEMENT #137

CATEGORY	BOY	BOOK VALUE	EOY FMV
MORGAN STANLEY MUTUAL FUNDS	733,734		
EDWARD JONES STOCK MUT FDS	1,436,008	2,244,225	2,305,871
TOTALS	2,169,742	2,244,225	2,305,871

Federal Supporting Statements

2018 PG01

Name(s) as shown on return: JAMES & MARIE MCCURDY FAMILY

Tax ID Number: 42-6468384

FORM 990PF - PART I - LINE 16(B) - ACCOUNTING FEES SCHEDULE

STATEMENT #108~

DESCRIPTION	REVENUE AND EXPENSES	NET INVESTMENT	ADJUSTED NET INCOME	CHARITABLE PURPOSE
ACCOUNTING FEES	1,125	1,125	1,125	0
TOTALS	1,125	1,125	1,125	0

PG01

FORM 990PF - PART I - LINE 16(C) - OTHER PROFESSIONAL FEES SCHEDULE

STATEMENT #109~

DESCRIPTION	REVENUE AND EXPENSES	NET INVESTMENT	ADJUSTED NET INCOME	CHARITABLE PURPOSE
INVESTMENT FEES	21,627	21,627	21,627	0
TOTALS	21,627	21,627	21,627	0

Federal Supporting Statements

2018 PG01

Name(s) as shown on return: JAMES & MARIE MCCURDY FAMILY

Tax ID Number: 42-6468384

FORM 990PF - PART I - LINE 18 - TAXES SCHEDULE

STATEMENT #110~

DESCRIPTION	REVENUE AND EXPENSES	NET INVESTMENT	ADJUSTED NET INCOME	CHARITABLE PURPOSE
US TREAS FED TAX	1,928	0	0	0
FOREIGN TAX	736	736	736	0
TOTALS	2,664	736	736	0

PG01

FORM 990-PF - PART IV - CAPITAL GAINS AND LOSSES INFORMATION (OVERFLOW)

STATEMENT #134~

DESCRIPTION	P-PURCHASE D-DONATION	DATE ACQUIRED	DATE SOLD	SALES PRICE	DEPRECIATION	COST OR OTHER BASIS	GAIN OR LOSS	GAINS MINUS EXCESS OR LOSSES
ED JONES PUBL TRADED SECURITIES	P	12-12-2017	07-18-2018	21,038		18,619	2,419	2,419
ED JONES PUBL TRADED SECURITIES	P	09-17-2015	07-18-2018	320,792		280,530	40,262	40,262
ED JONES PUBL TRADED SECURITIES	P	09-12-2011	11-14-2018	3,840		3,980	(140)	(140)
ED JONES PUBL TRADED SECURITIES	P	05-02-2018	08-10-2018	136,580		137,882	(1,302)	(1,302)
ED JONES PUBL TRADED SECURITIES	P	03-20-2015	08-10-2018	125,216		127,362	(2,146)	(2,146)
MG STAN PUBL TRADED SECURITIES	P	01-09-2018	02-09-2018	14,153		14,332	(179)	(179)
MG STAN PUBL TRADED SECURITIES	P	03-02-2012	05-02-2018	124,194		110,814	13,380	13,380
MG STAN PUBL TRADED	P	11-01-2016	05-02-2018	124		123	1	1
MG STAN PUBL TRADED SEC SPDR GOLD	P	03-15-2015	05-04-2018	28		28		
TOTAL				745,965		693,670	52,295	52,295

James & Marie McCurdy Family Charitable Trust
42-6468384
Form 990-PF,Part XV,Line 3 (a): Paid During Year

	$123,887 To Distribute	Dollars to Each Entity
(1) Bidwell Riverside Center 1203 Heartford Avenue Des Moines, IA 50315 Purpose· Individual & family ministries		$ 2,000
(2) MUMM's (Mobile United Methodist Missionaries) Attn· Ritanna Seaton 1670 220th Street Batavia, IA 52533 Purpose: Children missionary work		$ 4,500
(3) Iowa Wesleyan College Attn· Office of Institutional Relations 601 N Main Street Mt. Pleasant, IA 52641-1398 Purpose: Campus Ministry		$ 2,500
(4) Samaritan's Purse PO Box 3000 Boone, NC 28607 Purpose Christian Humanitarian Work		$ 15,500
(5) Ecumenical Lord's Cupboard PO Box 223 Ottumwa, IA 52501 Purpose. Food Relief		$ 4,000
(6) LOVE, Inc 500 High Avenue West Oskaloosa, IA 52577 Purpose: Local missions		$ 2,500
(7) The Ecumenical Cupboard 205 South D Street Oskaloosa, IA 52577 Purpose: Food relief		$ 3,000
(8) God's Kids 11700 Industry Avenue Fontana, CA 92337-6934 Purpose. Orphanage(s) with greatest need		$ 3,500

(9) Mahaska County Habitat for Humanity | $ 3,000
PO Box 583
Oskaloosa, IA 52577

Purpose: Local project

(10) Child Evangelism Fellowship | $ 2,500
PO Box 652
Oskaloosa, IA 52577

Purpose: Children ministries

(11) Food for the Hungry | $ 8,000
1224 East Washington Street
Phoenix, AZ 85034-1102

Purpose: Feeding programs

(12) Prison Fellowship | $ 5,000
PO Box 1550
Merrifield, VA 22116-1550

Purpose. Prison ministries

(13) Our Daily Bread Ministries | $ 3,000
Box 2222
Grand Rapids, MI 49501-2222

Purpose: Christian ministries

(14) Crisis Intervention Services | $ 1,500
500 High Ave West
Oskaloosa, IA 52577

Purpose: Women's/Children's Shelter

(15) Doctors Without Boarders | $ 5,000
333 Seventh Ave, 2nd Floor
New York, NY 10001

Purpose: Medical Projects

(16) The Smile Train | $ 4,000
PO Box 96246
Washington D.C 20090-6246

Purpose. Children Medical Surgeries

(17) Hope Ministries | $ 3,500
PO Box 862
Des Moines, IA 50304-0862

Purpose: Christian Outreach Programs

(18) Pay It Forward Christmas Charity, Inc. $ 1,500
c/o Mary Sauter
1009 E Ave. East
Albia, IA 52531

Purpose· Christmas Outreach Program

(19) Fremont United Methodist Church $ 4,000
PO Box 18
Fremont, IA 52561

Purpose: General Operations = $1,000 and
Local Mission Outreach Program = $3,000

(20) Hopewell Church $ 4,000
10400 Echo Avenue
Blakesburg, IA 52536

Purpose: Christian ministries

(21) Christain Appalachian Project $ 1,500
PO Box 55911
Lexington, KY 40555-5911

Purpose: Care for the Poor

(22) Blank Children's Hospital $ 3,387
1200 Pleasant Street
Des Moines, IA 50309

Purpose· Children's Hospital Care

(23) Billy Graham Evangelistic Association $ 13,000
Attn· Planned Giving Admin
1 Billy Graham Parkway
Charlotte, NC 28201-0001

Purpose. Christian Ministries

(24) Food Bank of Southern Iowa, Inc. $ 4,000
PO Box 1294
705 West Main
Ottumwa, IA 52501

Purpose: Food Relief

(25) The Salvation Army Service Extension Unit $ 1,000
PO Box 487
Oskaloosa, IA 52577

Purpose Christian Outreach Work

(26) ZION Lutheran Church $ 2,000
4300 Beaver Avenue
Des Moines, IA 50310
Purpose. Local Outreach Ministries

(27) World Christian Broadcasting 605 Bradley Ct. Franklin, TN 37067-8200 Purpose. Broadcasting Christian The Good News of Jesus Christ	$	5,000
(28) Fremont Baptist Church PO Box 196 Fremont, IA 52561 Purpose: Local Christian Ministries = $3,000 and Furnace AirConditioner Replacement Project = $3,500	$	3,000
(29) University of Iowa Foundation Levitt Center for University Advancement One West Park Road, PO Box 4550 Iowa City, IA 52244-4550 Purpose: Holden Comprehensive Cancer Center	$	2,000
(30) Hour of Power P O Box 100 Garden Grove, CA 92842 Purpose: TV Ministries	$	2,500
(31) Mayo Clinic Attn. Development 200 1st Street S.W Rochester, MN 55905 Purpose. Research in Lewy Body Dementia @ UDALL Center for Excellence	$	4,000
Totals	$	123,887

James & Marie McCurdy Family Charitable Trust
42-6468384
Form 990-PF,Part XV,Line 3 (b): Approved for Future Payments

	$126,697 To Distribute	Dollars to Each Entity
(1) Bidwell Riverside Center 1203 Heartford Avenue Des Moines, IA 50315 Purpose: Individual & family ministries		$ 2,000
(2) MUMM's (Mobile United Methodist Missionaries) Attn: Ritanna Seaton 1670 220th Street Batavia, IA 52533 Purpose. Children missionary work		$ 4,500
(3) Iowa Wesleyan College Attn: Office of Institutional Relations 601 N Main Street Mt. Pleasant, IA 52641-1398 Purpose: Campus Ministry		$ 2,500
(4) Samaritan's Purse PO Box 3000 Boone, NC 28607 Purpose: Christian Humanitarian Work		$ 15,500
(5) Ecumenical Lord's Cupboard 202 East 4th Street Ottumwa, IA 52501-0249 Purpose· Food Relief		$ 4,000
(6) LOVE, Inc 500 High Avenue West Oskaloosa, IA 52577 Purpose: Local missions		$ 3,000
(7) Ecumenical Cupboard 205 South D Street Oskaloosa, IA 52577 Purpose: Food relief		$ 4,000

(8) Mahaska County Habitat for Humanity PO Box 583 Oskaloosa, IA 52577 Purpose: Local project	$	3,000
(9) Child Evangelism Fellowship PO Box 652 Oskaloosa, IA 52577 Purpose: Children ministries	$	2,500
(10) Food for the Hungry 1224 East Washington Street Phoenix, AZ 85034 Purpose: Feeding programs	$	8,000
(11) Prison Fellowship PO Box 1550 Merrifield, VA 22116-1550 Purpose: Prison ministries	$	5,000
(12) Our Daily Bread Ministries Box 2222 Grand Rapids, MI 49501-2222 Purpose. Christian ministries	$	3,000
(13) Crisis Intervention Services 500 High Ave West Oskaloosa, IA 52577 Purpose: Women's/Children's Shelter	$	2,500
(14) Doctors Without Boarders 333 Seventh Ave, 2nd Floor New York, NY 10001 Purpose: Medical Projects	$	5,000
(15) The Smile Train 41 Madison Ave, 28th Floor New York, NY 10010 Purpose: Children Medical Surgeries	$	4,000
(16) Hope Ministries PO Box 862 Des Moines, IA 50304-0862 Purpose: Christian Outreach Programs	$	3,500

(17) Pay It Forward Christmas Charity, Inc c/o Mary Sauter 1009 E Ave. East Albia, IA 52531 Purpose. Christmas Outreach Program	$	1,500
(18) Fremont United Methodist Church PO Box 18 Fremont, IA 52561 Purpose: General Operations = $1,000 and Locas Mission Outreach Program = $3,000	$	4,000
(19) Hopewell Church 10400 Echo Avenue Blakesburg, IA 52536 Purpose: Christian ministries	$	4,000
(20) Christain Appalachian Project PO Box 55911 Lexington, KY 40555-5911 Purpose: Care for the Poor	$	1,500
(21) Blank Children's Hospital 1200 Pleasant Street Des Moines, IA 50309 Purpose. Children's Hospital Care	$	3,697
(22) Billy Graham Evangelistic Association Attn· Planned Giving Admin 1 Billy Graham Parkway Charlotte, NC 28201-0001 Purpose: Christian Ministries	$	15,500
(23) Food Bank of Southern Iowa, Inc. PO Box 1294 705 West Main Ottumwa, IA 52501 Purpose: Food Relief	$	4,000
(24) The Salvation Army Service Extension Unit PO Box 487 Oskaloosa, IA 52577 Purpose: Christian Outreach Work	$	1,000

(25) ZION Lutheran Church 4300 Beaver Avenue Des Moines, IA 50310 Purpose: Local Outreach Ministries	$	2,000
(26) World Christian Broadcasting 605 Bradley Ct Franklin, TN 37067-8200 Purpose: Broadcasting Christian The Good News of Jesus Christ	$	5,000
(27) Fremont Baptist Church PO Box 196 Fremont, IA 52561 Purpose General Operations = $2,000 Local Christian Ministries = $2,000	$	4,000
(28) University of Iowa Foundation Levitt Center for University Advancement One West Park Raod, PO Box 4550 Iowa City, IA 52244-4550 Purpose: Holden Comprehensive Cancer Center	$	2,000
(29) Crystal Cathedral Ministries dba Hour of Power PO Box 100 Garden Grove, CA 92842-0100 Purpose TV Ministires	$	2,500
(30) Mayo Clinic Attn. Development 200 1st Street S W Rochester, MN 55905 Purpose: Research in Lewy Body Dementia @ UDALL Center for Excellence	$	4,000
Totals	$	126,697