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Form **990-PF**

Return of Private Foundation
or Section 4947(a)(1) Trust Treated as Private Foundation

OMB No 1545-0052

2018

Department of the Treasury
Internal Revenue Service

▶ 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.

Open to Public Inspection

For calendar year 2018 or tax year beginning , 2018, and ending , 20

Name of foundation W LEROY AND MILDRED MCCURDY LARRY MCCURDY-TRUSTEE		A Employer identification number 42-6468385
Number and street (or P.O. box number if mail is not delivered to street address) 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 <input type="checkbox"/> 6
G Check all that apply	Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change <input type="checkbox"/>	D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation 04 <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ 1,671,902	J Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> 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 <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))					(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc., received (attach schedule)						
	2	Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B						
	3	Interest on savings and temporary cash investments			4	4	4	
	4	Dividends and interest from securities			88,948	88,948	88,948	
	5a	Gross rents						
	b	Net rental income or (loss)						
	6a	Net gain or (loss) from sale of assets not on line 10			35,566			
	b	Gross sales price for all assets on line 6a 573,736						
	7	Capital gain net income (from Part IV, line 2)				35,566		
	8	Net short-term capital gain					1,187	
	9	Income modifications						
	10a	Gross sales less returns and allowances						
Operating and Administrative Expenses	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			124,518	124,518	90,139	
	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			1,135	1,135	1,135	
	c	Other professional fees (attach schedule)						
	17	Interest						
	18	Taxes (attach schedule) (see instructions) STM110			2,235	667	667	
	19	Depreciation (attach schedule) and depletion						
	20	Occupancy						
	21	Travel, conferences, and meetings						
	22	Printing and publications						
	23	Other expenses (attach schedule) STM103			17,137	17,137	17,137	
	24	Total operating and administrative expenses. Add lines 13 through 23			20,507	18,939	18,939	0
	25	Contributions, gifts, grants paid			92,205			92,723
	26	Total expenses and disbursements. Add lines 24 and 25			112,712	18,939	18,939	92,723
	27	Subtract line 26 from line 12						
	a	Excess of revenue over expenses and disbursements			11,806			
	b	Net investment income (if negative, enter -0-)				105,579		
	c	Adjusted net income (if negative, enter -0-)					71,200	

For Paperwork Reduction Act Notice, see instructions.

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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	42,599	1,422	1,422
	2 Savings and temporary cash investments			
	3 Accounts receivable 2,599			
	Less allowance for doubtful accounts	2,401	2,599	2,599
	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)			
	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) STM118	1,649,685	1,703,537	1,667,881	
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)	1,694,685	1,707,558	1,671,902	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable	92,723	92,205	
	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)	92,723	92,205		
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	1,601,962	1,615,353	
	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)	1,601,962	1,615,353	
31 Total liabilities and net assets/fund balances (see instructions)	1,694,685	1,707,558		

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	1,601,962
2 Enter amount from Part I, line 27a	2	11,806
3 Other increases not included in line 2 (itemize) STM115	3	1,585
4 Add lines 1, 2, and 3	4	1,615,353
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	1,615,353

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 573,736		538,170	35,566	
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			35,566	
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 35,566
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 1,187

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	86,982	1,854,469	0.046904
2016	93,538	1,739,649	0.053768
2015	96,815	1,870,755	0.051752
2014	91,333	1,936,292	0.047169
2013	85,646	1,826,660	0.046887
2 Total of line 1, column (d)			2 0.24648
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 0.049296
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5			4 1,844,091
5 Multiply line 4 by line 3			5 90,906
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 1,056
7 Add lines 5 and 6			7 91,962
8 Enter qualifying distributions from Part XII, line 4			8 92,723

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 VII 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)			
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		1	1,056
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	1,056
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	1,056
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	1,600	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	1,600	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	544	
11 Enter the amount of line 10 to be. Credited to 2019 estimated tax <input checked="" type="checkbox"/> 544 Refunded <input type="checkbox"/>	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 checked="" type="checkbox"/> \$ _____ (2) On foundation managers <input checked="" type="checkbox"/> \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input checked="" 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?		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.		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		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2018 or the tax year beginning in 2018? See instructions for Part XIV? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

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?	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		<input type="checkbox"/>
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?	Yes	No
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	N/A
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?		X
1c		
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 ▶		
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?	<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		N/A
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		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?		X
4b		

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

5a During the year, did the foundation pay or incur any amount to

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions ☐ Yes ☒ No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

	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

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?

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?

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

5b		N/A
6b		X
7b		N/A
8		

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
LARRY CARRIKER 1704 S PARK AVE, OSKALOOSA, 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 N/A	0
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	1,841,901
b	Average of monthly cash balances	1b	30,273
c	Fair market value of all other assets (see instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	1,872,174
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	1,872,174
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	28,083
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,844,091
6	Minimum investment return. Enter 5% of line 5	6	92,205

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	92,205
2a	Tax on investment income for 2018 from Part VI, line 5	2a	1,056
b	Income tax for 2018 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	1,056
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	91,149
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	91,149
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	91,149

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	92,723
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	92,723
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	1,056
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	91,667

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				91,149
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only			91,155	
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 ▶ \$ <u>92,723</u>				
a Applied to 2017, but not more than line 2a			91,155	
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				91,149
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 N/A

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

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

Tax year	Prior 3 years			(e) Total
(a) 2018	(b) 2017	(c) 2016	(d) 2015	
85% of line 2a				
Qualifying distributions from Part XII, line 4 for each year listed	N/A			
Amounts included in line 2c not used directly for active conduct of exempt activities				
Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c				

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

a "Assets" alternative test - enter

(1) Value of all assets

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

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

c "Support" alternative test - enter

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

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

(3) Largest amount of support from an exempt organization

(4) Gross investment income

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year - see instructions.)**1 Information Regarding Foundation Managers:**

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

NONE

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

NONE

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

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

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

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 SCHEDULE ATTACHED				92,723
Total			3a	92,723
b Approved for future payment SCHEDULE ATTACHED				92,205
Total			3b	92,205

Enter gross amounts unless otherwise indicated

(See worksheet in line 13 instructions to verify calculations)

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Federal Supporting Statements

2018 PG01

Name(s) as shown on return

Tax ID Number

W LEROY AND MILDRED MCCURDY

42-6468385

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

STATEMENT #115

NON DIVIDEND DISTRIBUTION 1,585

TOTAL 1,585

FORM 990PF - PART II - LINE 13 INVESTMENTS: OTHER SCHEDULE

PG01
STATEMENT #118

CATEGORY	BOOK VALUE (BOY)	BOOK VALUE (EOY)	FMV (EOY)
EDWARD JONES MUTUAL FDS	933,351	1,703,537	1,667,881
MORGAN STANLEY MUTUAL FDS	716,334		
TOTAL	1,649,685	1,703,537	1,667,881

Federal Supporting Statements

2018 PG01

Name(s) as shown on return

Tax ID Number

W LEROY AND MILDRED MCCURDY

42-6468385

STATEMENT #103~

FORM 990PF - PART I - LINE 23 - OTHER EXPENSES SCHEDULE

DESCRIPTION	REVENUE AND EXPENSES	NET INVESTMENT	ADJUSTED NET INCOME	CHARITABLE PURPOSE
INVEST FEES MUT FUNDS	17,137	17,137	17,137	0
TOTALS	17,137	17,137	17,137	0

PG01

STATEMENT #108~

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

DESCRIPTION	REVENUE AND EXPENSES	NET INVESTMENT	ADJUSTED NET INCOME	CHARITABLE PURPOSE
HUNT AND ASSOC TAX PREP	1,135	1,135	1,135	0
TOTALS	1,135	1,135	1,135	0

Federal Supporting Statements

2018 PG01

Name(s) as shown on return

Tax ID Number

W LEROY AND MILDRED MCCURDY

42-6468385

STATEMENT #110~

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

DESCRIPTION	REVENUE AND EXPENSES	NET INVESTMENT	ADJUSTED NET INCOME	CHARITABLE PURPOSE
FOREIGN TAXES PAID	667	667	667	0
FED EXCISE TAX PAID	1,568	0	0	0
TOTALS	2,235	667	667	0

PG01

STATEMENT #134~

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

- P-PURCHASE

DESCRIPTION	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	01-15-2018	07-18-2018	9,361		7,657	1,704	1,704
ED JONES PUBL TRADED SECURITIES	P	09-17-2015	11-13-2018	196,198		173,412	22,786	22,786
ED JONES PUBL TRADED SECURITIES	P	05-02-2018	08-09-2018	136,563		136,903	(340)	(340)
ED JONES PUBL TRADED SECURITIES	P	03-17-2015	08-09-2018	96,270		97,516	(1,246)	(1,246)
MG STAN PUBL TRADED SECURITIES	P	01-09-2018	02-09-2018	13,932		14,109	(177)	(177)
MG STAN PUBL TRADED SECURITIES	P	06-02-2016	02-09-2018	121,260		108,450	12,810	12,810
MG STAN PUBL TRADED SECURITIES	P	11-01-2016	05-02-2018	124		123	1	1
MG STAN PUBL TRADED SECURITIES	P	12-01-2016	05-04-2018	28		28	28	28
TOTAL				573,736		538,170	35,566	35,566

W. Leroy & Mildred McCurdy Charitable Trust
42-6468385
Form 990-PF, Part XV, Line 3 (a): Paid During Year

	\$92,723 To Distribute	% to Each Entity	Dollars to Each Entity
(1) Mid American Nazarene College 2030 E College Way Olathe, KS 66062-1899 Purpose: For General Operations of College.		20%	\$ 18,545
(2) World Gospel Missions PO Box 948 Marion, IN 46952-0948 Purpose: For missionary work of the Donald Hawk Family. As long as they are doing missionary work.		14%	\$ 12,982
(3) Iowa Nazarene Missionary Society % Barb Dunsdon, Treasurer PO Box 402 Tabor, IA 51653 Purpose: For missionary work		5%	\$ 4,636
(4) Fremont United Methodist Church PO Box 18 Fremont, IA 52561 Purpose: For advanced special mission work.		5%	\$ 4,636
(5) Mahaska County Outreach Kendra Slycord, Treasurer 2367 Highway 92 Oskaloosa, IA 52577-9626 Purpose: For general operations of its outreach program		5%	\$ 4,636
(6) White Oak Cemetery Assoc. White Oak Township, Mahaska County % Larry Linsley, Treasurer 2725 Teller Avenue Cedar, IA 52543 Purpose: For the upkeep of said cemetery		2%	\$ 1,854

(7) Gideons International PO Box 140800 Nashville, TN 37214-0800	9% \$ 8,345
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Purpose: For general operations of Gideons International work.

(8) Kentucky Mountain Bible College Missionary & Pastoral Scholarship Fund PO Box 10 Vancleve, KY 41385	10% \$ 9,273
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Purpose: To be used by persons attending this Christian college and is preparing for missionary or pastoral work

(9) Fremont Ambulance, Ltd. PO Box 192 Fremont, IA 52561	2% \$ 1,854
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Purpose: For general operations of the rescue unit.

(10) Mahaska County Historical Society Nelson Pioneer Farm & Crafts Museum PO Box 578 Oskaloosa, IA 52577	2% \$ 1,854
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Purpose: For general operations of museum.

(11) Iowa State Holiness Association Attn: Brady Hunter, President 3981 Addison Avenue Riceville, IA 50466	2% \$ 1,854
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Purpose: For general operations of camp meetings

(12) Iowa Wesleyan College 601 N Main Street Mount Pleasant, IA 52641	20% \$ 18,545
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Purpose: For general operations of college

(13) American Bible Society 1865 Broadway New York, NY 10023-7505	4% \$ 3,709
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Purpose: For general operations of American Bible Society.

Totals	<u>100%</u>	\$ <u>92,723</u>
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W Leroy & Mildred McCurdy Charitable Trust
42-6468385
Form 990-PF, Part XV, Line 3 (b): Approved for Future Payment

	\$92,205 To Distribute	% to Each Entity	Dollars to Each Entity
(1) Mid American Nazarene College 2030 E College Way Olathe, KS 66062-1899 Purpose: For General Operations of College.		20%	\$ 18,441
(2) World Gospel Missions PO Box 948 Marion, IN 46952-0948 Purpose: For missionary work of the Donald Hawk Family. As long as they are doing missionary work		14%	\$ 12,909
(3) Iowa Nazarene Missionary Society Tina Goetzinger, Iowa District Treasurer 5701 W Mustang Rd Cedar Rapids, IA 52411 Purpose. For missionary work.		5%	\$ 4,610
(4) Fremont United Methodist Church PO Box 18 Fremont, IA 52561 Purpose For advanced special mission work.		5%	\$ 4,610
(5) Mahaska County Outreach Kendra Slycord, Treasurer 2367 Highway 92 Oskaloosa, IA 52577-9626 Purpose. For general operations of its outreach program		5%	\$ 4,610
(6) White Oak Cemetery Assoc. White Oak Township, Mahaska County % Michelle Hall, Treasurer 2998 255th Street Oskaloosa, Iowa 52577 Purpose For the upkeep of said cemetery		2%	\$ 1,844
(7) Gideons International		9%	\$ 8,299

PO Box 140800
Nashville, TN 37214-0800

Purpose: For general operations of Gideons Internation work.

(8) Kentucky Mountain Bible College Missionary & Pastoral Scholarship Fund 855 Hwy 541 Jackson, KY 41339	10% \$ 9,221
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Purpose: To be used by persons attending this Christian college and is preparing for missionary or pastoral work.

(9) Fremont Ambulance, Ltd 223 South Miles Street Fremont, IA 52561	2% \$ 1,844
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Purpose: For general operations of the rescue unit.

(10) Mahaska County Historical Society Nelson Pioneer Farm & Crafts Museum PO Box 578 Oskaloosa, IA 52577	2% \$ 1,844
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Purpose. For general operations of museum

(11) Iowa State Holiness Association Attn: Brady Hunter, President 3981 Addison Avenue Riceville, IA 50466	2% \$ 1,844
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Purpose: For general operations of camp meetings.

(12) Iowa Wesleyan College 601 N Main Street Mount Pleasant, IA 52641	20% \$ 18,441
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Purpose: For general operations of college.

(13) American Bible Society 101 N.Independence Mall East Floor 8 Philadelphia, PA 19106-2155	4% \$ 3,688
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Purpose. For general operations of American Bible Society.

Totals	<u>100% \$ 92,205</u>
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