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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 , and ending

Name of foundation: MORGAN FAMILY LEGACY FOUNDATION

A Employer identification number: 47-5638410

Number and street (or P O box number if mail is not delivered to street address): 11709 ROE AVE., SUITE D138 — Room/suite:

B Telephone number: 913-851-8385

City or town, state or province, country, and ZIP or foreign postal code: LEAWOOD, KS 66211

C If exemption application is pending, check here ▶ [ ]

10

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: [X] 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) ▶$ 5,607,670.

J Accounting method: [X] 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))

		(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	5,000.		N/A	
2	Check ▶ [ ] if the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments	4,688.	4,688.		STATEMENT 1
4	Dividends and interest from securities	181,192.	181,192.		STATEMENT 2
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	18,114.			
b	Gross sales price for all assets on line 6a 929,406.				
7	Capital gain net income (from Part IV, line 2)		18,114.		
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)				
11	Other income				
12	**Total** Add lines 1 through 11	208,994.	203,994.		
13	Compensation of officers, directors, trustees, etc	12,000.	12,000.		0.
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees STMT 3	92.	92.		0.
b	Accounting fees STMT 4	3,940.	3,940.		0.
c	Other professional fees STMT 5	30,058.	30,058.		0.
17	Interest				
18	Taxes STMT 6	11,443.	3,264.		0.
19	Depreciation and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses STMT 7	398.	398.		0.
24	**Total operating and administrative expenses** Add lines 13 through 23	57,931.	49,752.		0.
25	Contributions, gifts, grants paid	314,500.			314,500.
26	**Total expenses and disbursements** Add lines 24 and 25	372,431.	49,752.		314,500.
27	Subtract line 26 from line 12:				
a	Excess of revenue over expenses and disbursements	<163,437.>			
b	**Net investment income** (if negative, enter -0-)		154,242.		
c	**Adjusted net income** (if negative, enter -0-)			N/A	

Revenue — Operating and Administrative Expenses

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Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	238,012.	167,214.	167,214.
	2 Savings and temporary cash investments	1,185,696.	25,050.	25,050.
	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			
	7 Other notes and loans receivable ▶			
	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 STMT 8	0.	52,700.	52,651.
	b Investments - corporate stock STMT 9	1,219,709.	1,362,753.	2,113,607.
	c Investments - corporate bonds STMT 10	0.	71,984.	69,762.
	11 Investments - land, buildings, and equipment: basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 11	2,456,164.	3,255,209.	3,177,525.
	14 Land, buildings, and equipment: basis ▶			
	Less accumulated depreciation ▶			
	15 Other assets (describe ▶ DIVIDENDS DUE)	627.	1,861.	1,861.
	16 **Total assets** (to be completed by all filers - see the instructions. Also, see page 1, item I)	5,100,208.	4,936,771.	5,607,670.
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			
	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 ▶ ☐ 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 ▶ [X] and complete lines 27 through 31			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	5,100,208.	4,936,771.	
	30 **Total net assets or fund balances**	5,100,208.	4,936,771.	
	31 **Total liabilities and net assets/fund balances**	5,100,208.	4,936,771.	

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	5,100,208.
2	Enter amount from Part I, line 27a	2	<163,437.>
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	4,936,771.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	4,936,771.

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				
b	SEE ATTACHED STATEMENTS			
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	929,406.		911,292.	18,114.

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				18,114.

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 — 18,114.

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)
If (loss), enter -0- in Part I, line 8 — 3 — N/A

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	350,272.	6,132,788.	.057115
2016	0.	3,697,350.	.000000
2015	0.	0.	.000000
2014			
2013			

2 Total of line 1, column (d)	2	.057115
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	.019038
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	5,956,539.
5 Multiply line 4 by line 3	5	113,401.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,542.
7 Add lines 5 and 6	7	114,943.
8 Enter qualifying distributions from Part XII, line 4	8	314,500.

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	1,542.
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	1,542.
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	1,542.
6	Credits/Payments:				
a	2018 estimated tax payments and 2017 overpayment credited to 2018	6a	4,800.		
b	Exempt foreign organizations - tax withheld at source	6b	0.		
c	Tax paid with application for extension of time to file (Form 8868)	6c	0.		
d	Backup withholding erroneously withheld	6d	0.		
7	Total credits and payments. Add lines 6a through 6d			7	4,800.
8	Enter any **penalty** for underpayment of estimated tax. Check here [X] if Form 2220 is attached			8	0.
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	3,258.
11	Enter the amount of line 10 to be: **Credited to 2019 estimated tax** ▶ 3,258. **Refunded** ▶			11	0.

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. ▶ $ 0. **(2)** On foundation managers. ▶ $ 0.			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ 0.			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.	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? N/A	4b		
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. ▶ KS			
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 the 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

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 ▶ AMANDA K. MORGAN Telephone no. ▶ 913-851-8385

Located at ▶ 11709 ROE AVE., STE D138, LEAWOOD, KS ZIP+4 ▶ 66211

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 N/A

			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? STMT 13 ☒ 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

			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		X
	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 ▶ _____, _____, _____, _____

			Yes	No
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) N/A	2b		

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

			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.) N/A	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

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	N/A	5b		
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? N/A	☐ 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?	N/A	7b		
8 Is the foundation subject to the section 4960 tax on payment(s) of more than $1,000,000 in remuneration or 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.

(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
MICHAEL B. MORGAN 11709 ROE AVE., STE D138 LEAWOOD, KS 66211	DIRECTOR, CHAIRMAN & PRESI 1.00	0.	0.	0.
AMANDA K. MORGAN 11709 ROE AVE., STE D138 LEAWOOD, KS 66211	DIRECTOR, COO & SECRETARY 10.00	12,000.	0.	0.
BRIAN J. MORGAN 11709 ROE AVE., STE D138 LEAWOOD, KS 66211	DIRECTOR, CIO & TREASURER 1.00	0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). 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. 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 ▶		0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 N/A - REFER TO PART XV - ALL OF THE FOUNDATION'S CHARITABLE ACTIVITIES ARE CASH CONTRIBUTIONS PAID DIRECTLY TO TAX EXEMPT CHARITABLE ORGANIZATIONS.	0.
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
2	
All other program-related investments See instructions.	
3	
Total. Add lines 1 through 3 ▶	0.

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	5,066,098.
b	Average of monthly cash balances		1b	972,164.
c	Fair market value of all other assets		1c	8,986.
d	**Total** (add lines 1a, b, and c)		1d	6,047,248.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e 0.		
2	Acquisition indebtedness applicable to line 1 assets		2	0.
3	Subtract line 2 from line 1d		3	6,047,248.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)		4	90,709.
5	**Net value of noncharitable-use assets** Subtract line 4 from line 3. Enter here and on Part V, line 4		5	5,956,539.
6	**Minimum investment return** Enter 5% of line 5		6	297,827.

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	297,827.
2a	Tax on investment income for 2018 from Part VI, line 5	2a 1,542.		
b	Income tax for 2018. (This does not include the tax from Part VI.)	2b		
c	Add lines 2a and 2b		2c	1,542.
3	Distributable amount before adjustments. Subtract line 2c from line 1		3	296,285.
4	Recoveries of amounts treated as qualifying distributions		4	0.
5	Add lines 3 and 4		5	296,285.
6	Deduction from distributable amount (see instructions)		6	0.
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1		7	296,285.

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	314,500.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
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	314,500.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	1,542.
6	**Adjusted qualifying distributions** Subtract line 5 from line 4	6	312,958.

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.

823571 12-11-18

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				296,285.
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only			293,101.	
b Total for prior years: ____ , ____ , ____		0.		
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	0.			
4 Qualifying distributions for 2018 from Part XII, line 4: ▶ $ 314,500.				
a Applied to 2017, but not more than line 2a			293,101.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2018 distributable amount				21,399.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount - see instructions		0.		
e Undistributed income for 2017. Subtract line 4a from line 2a. Taxable amount - see instr			0.	
f Undistributed income for 2018. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2019				274,886.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2013 not applied on line 5 or line 7	0.			
9 **Excess distributions carryover to 2019** Subtract lines 7 and 8 from line 6a	0.			
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) N/A

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

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

	Tax year	Prior 3 years			
	(a) 2018	(b) 2017	(c) 2016	(d) 2015	(e) Total
2 a 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)(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.

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

SEE STATEMENT 12

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

STATEMENT 12

c Any submission deadlines:

STATEMENT 12

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

STATEMENT 12

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				
BARSTOW SCHOOL 11511 STATE LINE ROAD KANSAS CITY, MO 64114	N/A	TAX-EXEMPT CHARITY	AN INDEPENDENT K-12 SCHOOL THAT EMPHASIZES SYMMETRICAL DEVELOPMENT OF MIND, BODY AND CHARACTER	30,000.
THE TEMPLE, CONGREGATION B'NAI JEHUDAH 12320 NALL OVERLAND PARK, KS 66209	N/A	TAX-EXEMPT CHARITY	SUPPORT RELIGIOUS MISSION OF SYNAGOGUE	85,000.
CANCER LEAGUE OF COLORADO P O BOX 5373 DENVER, CO 80155	N/A	TAX-EXEMPT CHARITY	TO SECURE THE CURE OR CONTROL OF CANCER BY RAISING FUNDS TO SUPPORT INNOVATIVE CANCER RESEARCH AND	10,000.
CHILDREN'S MERCY HOSPITAL 2401 GILLHAM ROAD KANSAS CITY, MO 64108	N/A	TAX-EXEMPT CHARITY	PROVIDES PEDIATRIC MEDICAL CENTER THAT INTEGRATES CLINICAL CARE, RESEARCH AND MEDICAL EDUCATION	15,000.
COLORADO PHOTOGRAPHIC ARTS CENTER 1070 BANNOCK STREET DENVER, CO 80204	N/A	TAX-EXEMPT CHARITY	DEDICATED TO THE ART OF PHOTOGRAPHY, OFFERING CONTEMPORARY PHOTOGRAPHY EXHIBITIONS, CLASSES	10,000.
Total SEE CONTINUATION SHEET(S)			▶ 3a	314,500.
b Approved for future payment				
NONE				
Total			▶ 3b	0.

** SEE PURPOSE OF GRANT CONTINUATIONS

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
	(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	4,688.	
4 Dividends and interest from securities			14	181,192.	
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	18,114.	
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)		0.		203,994.	0.

13 Total Add line 12, columns (b), (d), and (e) 13 203,994.

(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).
	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

Amanda K Morgan | 3-26-19 | SECRETARY

Signature of officer or trustee | Date | Title

May the IRS discuss this return with the preparer shown below? See instr ☒ Yes ☐ No

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
ROBERT J. O'HALLORAN	ROBERT J. O'HALLO	03/22/19		P00218447
Firm's name ▶ O'HALLORAN SHERMAN ASSOCIATES, LLC			Firm's EIN ▶ 20-2069908	
Firm's address ▶ 4801 W. 110TH ST., SUITE 150 OVERLAND PARK, KS 66211			Phone no. (913)341-8500	

823622 12-11-18

Schedule B
(Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

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

OMB No 1545 0047

2018

Name of the organization	Employer identification number
MORGAN FAMILY LEGACY FOUNDATION	47-5638410

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: MORGAN FAMILY LEGACY FOUNDATION

Employer identification number: 47-5638410

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	CAROL MORGAN 14008 WINDSOR STREET LEAWOOD, KS 66224	$ 5,000.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions)

Name of organization: MORGAN FAMILY LEGACY FOUNDATION

Employer identification number: 47-5638410

Part II **Noncash Property** (see instructions) Use duplicate copies of Part II if additional space is needed

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		$	

Name of organization: MORGAN FAMILY LEGACY FOUNDATION

Employer identification number: 47-5638410

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 info. once.) ▶ $

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

(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

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
SECURITY TRUST AND INVESTMENTS	2,562.	2,562.	
SECURITY TRUST AND INVESTMENTS AMORTIZATION OF BOND DISCOUNT	103.	103.	
SECURITY TRUST AND INVESTMENTS AMORTIZATION OF BOND PREMIUM	<445.>	<445.>	
TD AMERITRADE, INC	2,468.	2,468.	
TOTAL TO PART I, LINE 3	4,688.	4,688.	

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
SECURITY BANK OF KANSAS CITY	98,863.	0.	98,863.	98,863.	
SECURITY TRUST AND INVESTMENTS	14,066.	5,566.	8,500.	8,500.	
TD AMERITRADE, INC	84,278.	10,449.	73,829.	73,829.	
TO PART I, LINE 4	197,207.	16,015.	181,192.	181,192.	

FORM 990-PF LEGAL FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
SPENCER FANE LLP-LEGAL ADVICE REGARDING COMPLIANCE WITH PRIVATE FOUNDATION	0.	0.		0.
RULES AND REGULATIONS	92.	92.		0.
TO FM 990-PF, PG 1, LN 16A	92.	92.		0.

FORM 990-PF	ACCOUNTING FEES		STATEMENT 4	
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
O'HALLORAN SHERMAN ASSOCIATES, LLC - ACCOUNTING FOR ACTIVITY AND	0.	0.		0.
PREPARATION OF FORM 990-PF. ASSIST WITH COMPLIANCE OF PRIVATE FOUNDATION	0.	0.		0.
RULES AND REGULATIONS.	3,940.	3,940.		0.
TO FORM 990-PF, PG 1, LN 16B	3,940.	3,940.		0.

FORM 990-PF	OTHER PROFESSIONAL FEES		STATEMENT 5	
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT FEES-CREATIVE PLANNING INC	26,047.	26,047.		0.
INVESTMENT FEES-SECURITY TRUST AND INVESTMENTS	4,011.	4,011.		0.
TO FORM 990-PF, PG 1, LN 16C	30,058.	30,058.		0.

FORM 990-PF	TAXES		STATEMENT 6	
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL EXCISE TAX ON INVESTMENT INCOME	8,179.	0.		0.
FOREIGN TAXES ON INVESTMENT INCOME	3,224.	3,224.		0.
TAXES AND LICENSES-KANSAS ANNUAL REPORT	40.	40.		0.
TO FORM 990-PF, PG 1, LN 18	11,443.	3,264.		0.

FORM 990-PF OTHER EXPENSES STATEMENT 7

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
SUPPLIES/POST OFFICE BOX RENTAL	312.	312.		0.
BANK FEES	86.	86.		0.
TO FORM 990-PF, PG 1, LN 23	398.	398.		0.

FORM 990-PF U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS STATEMENT 8

DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
US TREASURY NOTE DTD 1/31/2018 2.75%	X		5,970.	6,031.
US TREASURY NOTE DTD 1/31/2014 1.5%	X		8,985.	8,994.
US TREASURY NOTE DTD 8/15/2009 3.625%	X		8,137.	8,051.
US TREASURY NTS DTD 10/31/2015 1.875%	X		3,950.	3,911.
US TREASURY NOTE DTD 8/15/2011 2.125%	X		14,976.	14,863.
US TREASURY NOTE 2.125%	X		10,682.	10,801.
TOTAL U.S. GOVERNMENT OBLIGATIONS			52,700.	52,651.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			52,700.	52,651.

FORM 990-PF CORPORATE STOCK STATEMENT 9

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
35,536 SHS VALLEY VIEW BANCSHARES	1,151,366.	1,886,962.
455 SHS BERKSHIRE HATHAWAY INC	68,343.	92,902.
48 SHS AT & T	1,531.	1,370.
11 SHS AFFILIATED MANAGERS GROUP	2,224.	1,072.
6 SHS ALPHABET INC CL C	6,494.	6,214.
31 SHS ALTRIA GROUP INC	2,194.	1,531.
4 SHS AMAZON.COM INC	4,815.	6,008.

10 SHS AMERICAN TOWER CORP REIT	1,418.	1,582.
13 SHS AMERIPRISE FINANCIAL INC	2,200.	1,357.
43 SHS APPLE INC	7,400.	6,783.
11 SHS BERKSHIRE HATHAWAY INC CLASS B	2,201.	2,246.
1 SH BOOKING HLDGS INC	1,827.	1,722.
11 SHS BROADCOM INC	2,972.	2,797.
38 SHS CAMPBELL SOUP CO	1,640.	1,254.
18 SHS CATERPILLAR INC	2,833.	2,287.
24 SHS CELGENE CORP	2,621.	1,538.
33 SHS CONOCOPHILLIPS	1,862.	2,058.
12 SHS COSTCO WHOLESALE GROUP	2,289.	2,444.
32 SHS DANAHER CORP	3,002.	3,300.
16 SHS DIGITAL REALTY TRUST	1,822.	1,705.
28 SHS DOMINION ENERGY INC	2,167.	2,001.
22 SHS ECOLAB INC	2,981.	3,242.
39 SHS EXXON MOBILE CORP	3,386.	2,659.
14 SHS FACEBOOK INC CL A	2,586.	1,835.
169 SHS FORD MOTOR CO	1,806.	1,293.
41 SHS FORTIVE CORP	2,970.	2,774.
75 SHS GENERAL ELECTRIC	726.	568.
52 SHS HALLIBURTON CO	2,635.	1,382.
42 SHS HESS CORP	2,080.	1,701.
16 SHS HOME DEPOT INC	3,030.	2,749.
41 SHS JP MORGAN	4,437.	4,002.
155 SHS KEY CORP	3,174.	2,291.
30 SHS KRAFT HEINZ COMPANY	2,333.	1,291.
7 SHS MCDONALDS CORP	1,100.	1,243.
66 SHS MERCK & CO INC	3,731.	5,043.
51 SHS MICROSOFT CORP	4,439.	5,180.
2 SHS NETFLIX INC	731.	535.
8 SHS NORTHROP GRUMMAN CORP	2,455.	1,959.
23 SHS PNC FINANCIAL SERVICES GROUP INC	3,333.	2,689.
31 SHS PEPSICO INC	3,624.	3,425.
21 SHS PROCTOR & GAMBLE CO	1,536.	1,930.
12 SHS RAYTHEON CO	2,261.	1,840.
18 SHS SALESFORCE.COM INC	1,899.	2,465.
29 SHS STARBUCKS CORP	1,707.	1,868.
15 SHS THERMO FISHER SCIENTIFIC INC	2,948.	3,357.
20 SHS UNION PACIFIC CORP	2,731.	2,765.
9 SHS UNITED TECHNOLOGIES CORP	1,116.	958.
13 SHS UNITED HEALTH GROUP INC	2,908.	3,239.
65 SHS VERIZON COMMUNICATIONS INC	3,415.	3,654.
25 SHS VISA INC CL A	2,894.	3,298.
20 SHS WAL-MART INC	1,720.	1,863.
13 SHS ALLERGAN PLC	2,215.	1,738.
19 SHS EATON CORP PLC	1,553.	1,305.
36 SHS MEDTRONIC PLC	3,053.	3,275.
21 SHS CHUBB LIMITED	3,012.	2,713.
31 SHS TE CONNECTIVITY LTD	3,007.	2,345.
TOTAL TO FORM 990-PF, PART II, LINE 10B	1,362,753.	2,113,607.

FORM 990-PF	CORPORATE BONDS	STATEMENT 10

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
AON PLC SENIOR GLOBAL NOTE DTD 2/23/2016 3.875%	2,081.	1,974.
AT & T INC SR GLOBAL NT DTD 1/29/2016 3.6%	4,082.	3,975.
ALPHABET INC SENIOR GLOBAL NOTE DTD 8/02/2016 1.998%	2,838.	2,727.
AMAZON COM INC SR NOTE DTD 11/29/2012 2.5%	2,994.	2,934.
AMERICAN INTERNATIONAL GROUP INC SR GLBL NT DTD 3/22/2016 3.9%	3,102.	2,886.
AMGEN INC SR GLBL NT DTD 5/22/2014 3.625%	4,141.	3,988.
APPLE INC GLOBAL NOTE DTD 5/3/2013 2.4%	3,953.	3,868.
BANK AMERICA CORP DTD 10/19/2015 2.625%	4,023.	3,958.
BLACKROCK INC SR NT DTD 3/18/2014 3.5%	3,108.	3,032.
CHEVRON CORP SENIOR GLORBAL NOTE DTD 5/9/2016 2.1%	2,983.	2,942.
CITIGROUP INC SR GLBL NT 20 DTD 10/26/2015 2.65%	3,006.	2,960.
GENERAL ELECTRIC CAPITAL COPR MEDIUM TERM NOTE DTD 8/7/209 6%	3,114.	3,032.
GOLDMAN SACHS GROUP INC MEDIUM TERM NOTE DTD 12/15/2010 6%	3,150.	3,106.
INTEL CORP SR NOTE DTD 12/11/2012 2.7%	3,025.	2,955.
JP MORGAN SENIOR NOTE DTD 9/24/2012 3.25%	3,059.	2,976.
LOWES COS INC SENIOR GLOBAL NOTE 3.1%	3,016.	2,741.
MORGAN STANLEY SENIOR NOTE DTD 7/28/2011 5.5%	3,239.	3,144.
ORACLE CORP SENIOR GLOBAL NOTE DTD 6/29/2016 2.65%	2,919.	2,780.
RIO TINTO FINANCE USA LTD SR GLBL NT DTD 6/16/2015 3.75%	3,124.	3,012.
SALESFORCE.COM INC SR NT DTD 4/5/2018 3.7%	2,982.	3,016.
VERIZON COMMUNICATIONS INC SENIOR NOTE DTD 11/7/2012 2.45%	3,946.	3,880.
WELLS FARGO CO DTD 9/28/2015 3.55%	4,099.	3,876.
TOTAL TO FORM 990-PF, PART II, LINE 10C	71,984.	69,762.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT 11

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
1249 SHARES ISHARES MSCI EAFE SMALL CAP ETF	COST	64,235.	64,723.
2805 SHARES SCHWAB SCH US REIT ETF	COST	116,023.	108,021.
1776 SHS ISHARES CORE S & P 500ETF	COST	390,931.	446,859.
1855 SHS ISHARES CORE US AGGBD ET ETF	COST	201,508.	197,539.

5464 SHS ISHARES CORE MSCI EMKT ETF	COST	263,463.	257,628.
7567 SHS SCHWAB INTL EQTY ETF	COST	236,225.	214,524.
2231 SHS SPDR SERIES TRUST PORTFOLIO MD ETF	COST	74,880.	65,636.
10351 SHS VANGUARD FTSE DEV MKT ETF	COST	405,253.	384,022.
2348 SHS VANGUARD INT-TERM CORP ETF	COST	205,943.	194,555.
1444 SHS VANGUARD MID CAP ETF	COST	186,934.	199,532.
3905.49 SHS DFA US MICRO CAP FD	COST	77,833.	72,213.
4038.98 SHS DFA EMERGING MARKETS SMALL CAP PFT	COST	84,764.	75,690.
1612.111 SHS DFA INTL SML PTFL	COST	32,990.	25,681.
2246.539 SHS DFA US SMALL CAP VALUE PORT	COST	77,590.	67,396.
625005.13 SHS FEDERATED GOVT OBLIGATIONS INSTL CASH	COST	625,005.	625,005.
559.284 SHS GUGGENHEIM MACRO OPPORTUNITIES INSTL	COST	15,000.	14,541.
4110.014 SHS LORD ABBETT SHORT DURATION INCOME 1	COST	17,509.	17,015.
850.760 SHS DFA EMERGING MARKETS CORE EQUITY	COST	20,000.	16,377.
767.089 SHS DFA INTERNATIONAL SMALL CAP VALUE I	COST	18,000.	12,772.
416.156 SHS DFA US SMALL CAP	COST	15,000.	12,381.
2112.933 SHS IVY INTERNATIONAL CORE EQUITY I	COST	43,000.	32,349.
112.969 SHS MFS INTERNATIONAL VALUE R6	COST	5,000.	4,256.
353.208 SHS OPPENHEIMER DEVELOPING MARKETS I	COST	15,000.	13,274.
112.015 SHS T ROWE PRICE MID-CAP GROWTH I	COST	10,000.	8,555.
491.871 SHS T ROWE PRICE MID CAP VALUE FD CL I	COST	15,000.	11,997.
150 SHS SCHWAB US LARGE CAP GROWTH ETF	COST	11,051.	10,339.
500 SHS SCHWAB US LARGE CAP VALUE ETF	COST	27,072.	24,645.
TOTAL TO FORM 990-PF, PART II, LINE 13		3,255,209.	3,177,525.

FORM 990-PF GRANT APPLICATION SUBMISSION INFORMATION STATEMENT 12
PART XV, LINES 2A THROUGH 2D

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

AMANDA K. MORGAN
11709 ROE AVENUE, SUITE D138
LEAWOOD, KS 66211

TELEPHONE NUMBER

913-851-8385

FORM AND CONTENT OF APPLICATIONS

BRIEF LETTER STATING GENERAL NATURE, GOALS, & PURPOSE OF REQUESTING ORGANIZATION

ANY SUBMISSION DEADLINES

SUBMISSION SHOULD BE MADE BY DECEMBER 31ST FOR REQUEST FOR FUNDS FOR NEXT CALENDAR YEAR

RESTRICTIONS AND LIMITATIONS ON AWARDS

ORGANIZATION MUST BE TAX EXEMPT UNDER IRC 501(C)(3)

PART VII-B - SELF-DEALING (SECTION 4941), LINE 1a(4)

Amanda Morgan is the secretary and one of the directors of The Morgan Family Legacy Foundation. She is not one of the grantors of the foundation. Amanda attends numerous meetings, performs administrative duties and provides investment guidance for The Morgan Family Legacy Foundation, including taking minutes at meetings, receiving and presenting charitable requests to the other directors/officers of The Morgan Family Legacy Foundation, responding to those requests, and any other tasks that arise throughout the year related to The Morgan Family Legacy Foundation. The fee for her services was based on actual time spent performing these duties and was reasonable and not excessive.

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold, e g., 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	1954.96 SHS DFA INTL REAL ESTATE SEC PTF	P	12/15/17	05/11/18
b	509 SHS SPDR SERIES TRUST BLOOMBERG SRT TR EFT	P	05/08/17	04/10/18
c	48 SHHS SELECT SECTOR SPDR TRUST ENERGY ETF	P	09/11/17	05/11/18
d	4599 SHS VANGUARD FTSE DEV MKT ETF	P	VARIOUS	10/03/18
e	8700.78 SHS DFA INTL REAL ESTATE SEC PTF	P	VARIOUS	05/11/18
f	8 SHS ISHARES TRUST CORE S & P 500 ETF	P	03/24/17	10/17/18
g	662 SHS ISHARES TRUST CORE US AGGBD ET ETF	P	VARIOUS	02/09/18
h	1054 SHS ISHARES TRUST PFD AND INCM SEC ETF	P	VARIOUS	10/12/18
i	2106 SHS SPDR SERIES TRUST BLOOMBERG SRT TR ETF	P	VARIOUS	04/10/18
j	1031 SHS SPDR SERIES TRUST BLOOMBERG SRT TR ETF	P	06/13/16	05/11/18
k	992 SHS SELECT SECTOR SPDR TRUST ENERGY ETF	P	VARIOUS	05/11/18
l	273 SHS VANGUARD MID CAP ETF	P	VARIOUS	10/03/18
m	4 SHS BERKSHIRE HATHAWAY INC CLASS B	P	01/03/18	03/22/18
n	1 SHS CATERPILLAR INC	P	01/03/18	01/25/18
o	7 SHS CONOCOPHILLIPS	P	01/03/18	05/10/18

	(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	1,955.		1,907.	48.
b	13,939.		14,243.	<304.>
c	3,687.		3,124.	563.
d	198,457.		206,352.	<7,895.>
e	45,583.		45,838.	<255.>
f	2,250.		1,890.	360.
g	70,788.		73,900.	<3,112.>
h	37,818.		41,142.	<3,324.>
i	57,671.		57,709.	<38.>
j	28,269.		27,636.	633.
k	76,207.		68,045.	8,162.
l	44,723.		37,573.	7,150.
m	791.		800.	<9.>
n	169.		157.	12.
o	485.		395.	90.

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a				48.
b				<304.>
c				563.
d				<7,895.>
e				<255.>
f				360.
g				<3,112.>
h				<3,324.>
i				<38.>
j				633.
k				8,162.
l				7,150.
m				<9.>
n				12.
o				90.

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	
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). If (loss), enter "-0-" in Part I, line 8	3	

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold, e.g., 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	4 SHS COSTCO WHOLESALE CORP	P	01/03/18	05/10/18
b	1666.667 SHS EATON VANCE FLOATING RATE I	P	01/02/18	12/21/18
c	2 SHS FACEBOOK INC CL A	P	01/03/18	12/07/18
d	12 SHS HESS CORP	P	01/03/18	05/10/18
e	9 SHS KEY CORP	P	01/04/18	12/07/18
f	3 SHS KRAFT HEINZ COMPANY	P	01/04/18	03/22/18
g	1184.834 SHS LORD ABBETT SHORT DURATION INCOME	P	12/01/17	02/13/18
h	2380.952 SHS LORD ABBETT SHORT DURATION INCOME	P	12/01/17	03/22/18
i	1190.476 SHS LORD ABBETT SHORT DURATION INCOME	P	12/01/17	03/27/18
j	2392.344 SHS LORD ABBETT SHORT DURATION INCOME	P	12/01/17	05/23/18
k	478.469 SHS LORD ABBETT SHORT DURATION INCOME	P	12/01/17	06/13/18
l	2 SHS PNC FINANCIAL SERVICES GROUP INC	P	01/03/18	12/07/18
m	2 SHS RAYTHEON CO	P	01/03/18	11/02/18
n	3 SHS SALEFORCE.COM INC	P	01/03/18	03/22/18
o	800 SHS SCHWAB US LARGE CAP VALUE ETF	P	12/01/17	01/04/18

	(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	781.		763.	18.
b	14,533.		15,000.	<467.>
c	277.		369.	<92.>
d	759.		594.	165.
e	153.		184.	<31.>
f	182.		233.	<51.>
g	5,000.		5,047.	<47.>
h	10,000.		10,143.	<143.>
i	5,000.		5,071.	<71.>
j	10,000.		10,191.	<191.>
k	2,000.		2,038.	<38.>
l	257.		290.	<33.>
m	365.		377.	<12.>
n	353.		317.	36.
o	44,320.		43,316.	1,004.

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a				18.
b				<467.>
c				<92.>
d				165.
e				<31.>
f				<51.>
g				<47.>
h				<143.>
i				<71.>
j				<191.>
k				<38.>
l				<33.>
m				<12.>
n				36.
o				1,004.

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	
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). If (loss), enter "-0-" in Part I, line 8	3	

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold, e.g., 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	200 SHS SCHWAB US LARGE CAP VALUE ETF	P	12/01/17	10/09/18
b	16 SHS STARBUCKS CORP	P	01/03/18	09/25/18
c	29 SHS TJX COS INC	P	01/03/18	02/16/18
d	TARGET CORP SENIOR NOTE DTD 7/13/2010 3.875%	P	01/03/18	06/28/18
e	2 SHS UNION PACIFIC CORP	P	01/03/18	12/07/18
f	US TREASURY NOTE DTD 8/31/2011 1.5% 8/31/2018	P	01/03/18	02/26/18
g	US TREASURY NOTE DTD 8/31/2011 1.5% 8/31/2018	P	01/03/18	04/04/18
h	4703.669 SHS VANGUARD SHORT TERM INVESTMENT ADMIR	P	12/01/17	01/02/18
i	14075.674 SHS VANGUARD SHORT TERM INVESTMENT ADMI	P	12/01/17	01/03/18
j	4 SHS VERIZON COMMUNICATIONS INC	P	01/03/18	05/10/18
k	1 SH VISA INC CL A	P	01/03/18	01/25/18
l	31 SHS NVENT ELECTRIC PLC	P	01/03/18	05/10/18
m	31 SHS PENTAIR LT	P	01/03/18	05/10/18
n	US TREASURY NTS DTD 11/17/2016 1% 11/30/2018	P	01/03/18	10/23/18
o	1 SH PRICELINE GROUP, INC	P	01/03/18	02/27/18

	(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	11,212.		10,829.	383.
b	914.		942.	<28.>
c	2,268.		2,189.	79.
d	3,061.		3,101.	<40.>
e	299.		273.	26.
f	2,994.		2,997.	<3.>
g	2,996.		2,998.	<2.>
h	50,000.		50,094.	<94.>
i	149,624.		149,906.	<282.>
j	188.		210.	<22.>
k	125.		116.	9.
l	773.		732.	41.
m	1,374.		1,467.	<93.>
n	5,992.		5,995.	<3.>
o	1,827.		1,827.	0.

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a				383.
b				<28.>
c				79.
d				<40.>
e				26.
f				<3.>
g				<2.>
h				<94.>
i				<282.>
j				<22.>
k				9.
l				41.
m				<93.>
n				<3.>
o				0.

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	
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); If (loss), enter "-0-" in Part I, line 8	3	

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold, e.g., 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	11 SHS BROADCOM LTD	P	01/03/18	04/05/18
b	CAPITAL GAINS DIVIDENDS - STMT 2			
c				
d				
e				
f				
g				
h				
i				
j				
k				
l				
m				
n				
o				

	(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	2,972.		2,972.	0.
b	16,015.			16,015.
c				
d				
e				
f				
g				
h				
i				
j				
k				
l				
m				
n				
o				

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

	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a				0.
b				16,015.
c				
d				
e				
f				
g				
h				
i				
j				
k				
l				
m				
n				
o				

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	18,114.
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). If (loss), enter "-0-" in Part I, line 8	3	N/A