

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 (a) Book Value	End of year (b) Book Value (c) Fair Market Value		
Assets	1	Cash—non-interest-bearing		1	1
	2	Savings and temporary cash investments	30	14,418	14,418
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	2,533,383	2,185,946	3,501,107
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)				
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	2,533,413	2,200,365	3,515,526	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ☐ 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	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	2,533,413	2,200,365	
30	Total net assets or fund balances (see instructions)	2,533,413	2,200,365		
31	Total liabilities and net assets/fund balances (see instructions) .	2,533,413	2,200,365		

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	2,533,413
2	Enter amount from Part I, line 27a	2	-614,269
3	Other increases not included in line 2 (itemize) ▶ _____	3	285,012
4	Add lines 1, 2, and 3	4	2,204,156
5	Decreases not included in line 2 (itemize) ▶ _____	5	3,791
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	2,200,365

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)
1 a GS 284-0 PUBLICLY TRADED		2018-06-30	2018-12-31
b GS 285-7 PUBLICLY TRADED		2018-06-30	2018-12-31
c CAPITAL GAINS DIVIDENDS	P		
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 201,690		143,388	58,302
b 412,791		399,792	12,999
c 12,129			12,129
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(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			58,302
b			12,999
c			12,129
d			
e			

2 Capital gain net income or (net capital loss)	2	83,430
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	

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 does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see 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	1,360,703	3,740,606	0 363765
2016	763,099	3,939,521	0 193703
2015	648,672	4,141,155	0 156640
2014	1,245,464	4,092,842	0 304303
2013	195,500	4,140,537	0 047216

2 Total of line 1, column (d)	2	1 065627
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 213125
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	4,453,108
5 Multiply line 4 by line 3	5	949,069
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,354
7 Add lines 5 and 6	7	950,423
8 Enter qualifying distributions from Part XII, line 4	8	744,812

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 ☐ and enter 1% of Part I, line 27b	1	2,708
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	2,708
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	2,708
6	Credits/Payments		
a	2018 estimated tax payments and 2017 overpayment credited to 2018	6a	5,015
b	Exempt foreign organizations—tax withheld at source	6b	
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	5,015
8	Enter any penalty for underpayment of estimated tax. Check here ☐ 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	2,307
11	Enter the amount of line 10 to be Credited to 2019 estimated tax ☐ 2,307 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	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition). <i>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</i>	1b	No
c Did the foundation file Form 1120-POL for this year?	1c	No
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? <i>If "Yes," attach a detailed description of the activities</i>	2	No
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? <i>If "Yes," attach a conformed copy of the changes</i>	3	No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	No
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T</i>	5	No
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	Yes
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ PA		
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? <i>If "No," attach explanation</i> .	8b	Yes
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 taxable year beginning in 2018? See the instructions for Part XIV. <i>If "Yes," complete Part XIV</i>	9	No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i> 	10	Yes

Part VII-A Statements Regarding Activities (continued)

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		No
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		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	Yes	
14	The books are in care of ► JOAN BYRNE HALL Telephone no ► (610) 649-7161			

Located at **►** 7 SPRING MILL LANE HAVERFORD PA ZIP+4 **►** 19041

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here ► ☐			
	and enter the amount of tax-exempt interest received or accrued during the year ► 15			
16	At any time during calendar year 2018, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
	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.

1a	During the year did the foundation (either directly or indirectly)		Yes	No
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions. ☐	1b		
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		No
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 ► 20____, 20____, 20____, 20____			
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		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2018 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2018).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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		No

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

		Yes	No
5a	During the year did the foundation pay or incur any amount to		
(1)	Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes	☒ No
(2)	Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	☐ Yes	☒ No
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes	☒ No
(4)	Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions.	☐ Yes	☒ No
(5)	Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes	☒ No
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions.	5b	
	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? If "Yes," attach the statement required by Regulations section 53.4945–5(d)	☐ Yes	☐ No
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	6b	
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes	☒ No
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	7b	
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 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, foundation managers and their compensation. See instructions				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Additional Data Table				
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. ►		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	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3 ►	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	4,427,378
b	Average of monthly cash balances.	1b	93,544
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	4,520,922
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	4,520,922
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	67,814
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	4,453,108
6	Minimum investment return. Enter 5% of line 5.	6	222,655

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	222,655
2a	Tax on investment income for 2018 from Part VI, line 5.	2a	2,708
b	Income tax for 2018 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	2,708
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	219,947
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	219,947
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	219,947

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	744,812
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	744,812
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	744,812

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				219,947
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2018				
a From 2013.				
b From 2014. 1,044,294				
c From 2015. 457,998				
d From 2016. 569,949				
e From 2017. 1,176,217				
f Total of lines 3a through e.	3,248,458			
4 Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ <u>744,812</u>				
a Applied to 2017, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2018 distributable amount.				219,947
e Remaining amount distributed out of corpus	524,865			
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	3,773,323			
b Prior years' undistributed income Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2017 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2018 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2019				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2013 not applied on line 5 or line 7 (see instructions).	0			
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	3,773,323			
10 Analysis of line 9				
a Excess from 2014. 1,044,294				
b Excess from 2015. 457,998				
c Excess from 2016. 569,949				
d Excess from 2017. 1,176,217				
e Excess from 2018. 524,865				

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2018, enter the date of the ruling. ▶					
b Check box to indicate whether the organization 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	
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)) See Additional Data Table	
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	
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	
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	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
Name and address (home or business)				
a <i>Paid during the year</i> See Additional Data Table				
Total			▶ 3a	
b <i>Approved for future payment</i>				
Total			▶ 3b	

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2018)

Part XVII

- ## Part XVII

(a) Line No |

- 2a** Is the foun

- b** If "Yes," co

	Under
--	-------

Sign

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
BARBARA B BAEKGAARD	TRUSTEE 1 00	0	0	0
11003 HIGHCLERE PLACE FORT WAYNE, IN 46814				
JOAN BYRNE HALL	TRUSTEE 2 00	0	0	0
7 SPRING MILL LANE HAVERFORD, PA 19041				
ANNE-MARIE RAY	TRUSTEE 1 00	0	0	0
11008 TURNBERRY CT FORT WAYNE, IN 46814				
THOMAS BYRNE	TRUSTEE 1 00	0	0	0
6142 W HAMILTON RD FORT WAYNE, IN 46814				
JAMES BYRNE	TRUSTEE 1 00	0	0	0
2 WALLINGFORD RD MARBLEHEAD, MA 01945				

Form 990PF Part XV Line 1a - 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).

BARBARA B BAEKGAARD
JOAN BYRNE HALL
ANNE-MARIE RAY
THOMAS BYRNE
JAMES BYRNE

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
BOB WOODRUFF FOUNDATION 1350 BROADWAY SUITE 905 NEW YORK, NY 10018	NONE	PUBLIC CHARITY	COMMUNITY LIFE	50,000
CANCER SUPPORT COMMUNITY 734 15TH STREET NW SUITE 300 WASHINGTON, DC 20005	NONE	PUBLIC CHARITY	COMMUNITY LIFE	161,460
CEREBRAL PALSY FOUNDATION 3 COLUMBUS CIRCLE 15TH FLOOR NEW YORK, NY 10019	NONE	PUBLIC CHARITY	COMMUNITY LIFE	12,500
Total ► 3a				744,812

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
ERIN'S HOUSE FOR GRIEVING CHILDREN 5670 YMCA PARK DRIVE WEST FORT WAYNE, IN 46835	NONE	PUBLIC CHARITY	COMMUNITY LIFE	5,000
ESSEX COUNTY COMMUNITY FDN WOMEN'S FUND OF ESSEX COUNTY 175 ANDOVER STREET STE 101 DANVERS, MA 01923	NONE	PUBLIC CHARITY	COMMUNITY LIFE	2,000
EVANS SCHOLAR FOUNDATION - EDWARD W BRADLEY SCHOLARSHIP ONE BRIAR ROAD GOLF, IL 60029	NONE	PUBLIC CHARITY	EDUCATION	25,000
Total ▶ 3a				744,812

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
FOOD FOR THOUGHT INC 174 WATERCOLOR WAY STE 103 286 SANTA ROSA BEACH, FL 32459	NONE	PUBLIC CHARITY	COMMUNITY LIFE	10,000
GMVS SKI CLUB271 MOULTON RD WAITSFIELD, VT 05673	NONE	PUBLIC CHARITY	COMMUNITY LIFE	1,000
HIGH FIVES FOUNDATIONPO BOX 3212 TRUCKEE, CA 96160	NONE	PUBLIC CHARITY	COMMUNITY LIFE	1,000
Total ▶ 3a				744,812

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
HOLDERNESS SCHOOLPO BOX 1879 PLYMOUTH, NH 03264	NONE	PUBLIC CHARITY	EDUCATION	25,000
HOPE COLLEGE - COUNCIL SCHOLARSHIP - ENDOWED PO BOX 9000 HOLLAND, MI 494229000	NONE	PUBLIC CHARITY	EDUCATION	1,750
HOPE COLLEGE - HOPE FUND SCHOLARCHIP PO BOX 9000 HOLLAND, MI 494229904	NONE	PUBLIC CHARITY	EDUCATION	9,000
Total ▶ 3a				744,812

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
HOPE COLLEGE - PARENTS COUNCIL SCHOLARSHIP PO BOX 9000 HOLLAND, MI 494229904	NONE	PUBLIC CHARITY	EDUCATION	1,750
HOPE SUMMER REPERTORY THEATRE 141 EAST 12TH STREET HOLLAND, MI 49423	NONE	PUBLIC CHARITY	COMMUNITY LIFE	5,000
INDIANA UNIVERSITY VARSITY CLUB 1001 EAST 17TH STREET BLOOMINGTON, IN 47408	NONE	PUBLIC CHARITY	EDUCATION	20,000
Total ▶ 3a				744,812

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
JOHN F KENNEDY CENTER FOR THE PERFORMING ARTS 2700 F STREET WASHINGTON, DC 20566	NONE	PUBLIC CHARITY	COMMUNITY LIFE	10,000
LIFE INTERNATIONAL 72 RANSOM AVE NE GRAND RAPIDS, MI 49503	NONE	PUBLIC CHARITY	COMMUNITY LIFE	5,000
NORTH SHORE MEDICAL CENTER PO BOX 1282 MARBLEHEAD, MA 01945	NONE	PUBLIC CHARITY	COMMUNITY LIFE	2,000
Total ► 3a				744,812

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
OX-BOW SCHOOL OF ART & ARTISTS RESIDENCY 3435 RUPPRECHT WAY P O BOX 204 SAUGATUCK, MI 494530216	NONE	PUBLIC CHARITY	EDUCATION	10,000
ROBERT F KENNEDY HUMAN RIGHTS 88 PINE STREET SUITE 801 NEW YORK, NY 10005	NONE	PUBLIC CHARITY	COMMUNITY LIFE	6,800
SAUGATUCK CENTER FOR THE ARTS 400 CULVER STREET PO BOX 940 SAUGATUCK, MI 49453	NONE	PUBLIC CHARITY	COMMUNITY LIFE	5,000
Total ► 3a				744,812

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
ST LAWRENCE UNIVERSITY - ADVANCEMENT 23 ROMODA DRIVE CANTON, NY 13617	NONE	PUBLIC CHARITY	EDUCATION	25,000
TEAM RUBICON USA 6171 W CENTURY BLVD LOS ANGELES, CA 90045	NONE	PUBLIC CHARITY	COMMUNITY LIFE	5,000
THE CARRIAGE HOUSE3327 LAKE AVE FT WAYNE, IN 46805	NONE	PUBLIC CHARITY	COMMUNITY LIFE	10,000
Total ▶ 3a				744,812

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
THE MOBILITY WORKS FOUNDATION 4199 KINROSS LAKES PARKWAY RICHFIELD, OH 44286	NONE	PUBLIC CHARITY	COMMUNITY LIFE	5,000
TOWER SCHOOL75 WEST SHORE DR MARBLEHEAD, MA 01945	NONE	PUBLIC CHARITY	EDUCATION	35,000
UNITED WAY OF ALLEN COUNTY PO BOX 11784 FORT WAYNE, IN 46860	NONE	PUBLIC CHARITY	COMMUNITY LIFE	10,000
Total ▶ 3a				744,812

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
UNTERMYER GARDENS CONSERVATORY 945 NORTH BROADWAY YONKERS, NY 10701	NONE	PUBLIC CHARITY	COMMUNITY LIFE	2,500
US OLYMPIC AND PARALYMPIC FOUNDATION 1 OLYMPIC PLAZA COLORADO SPRINGS, CO 80909	NONE	PUBLIC CHARITY	COMMUNITY LIFE	123,552
US OLYMPIC AND PARALYMPIC FOUNDATION 1 OLYMPIC PLAZA COLORADO SPRINGS, CO 80909	NONE	PUBLIC CHARITY	COMMUNITY LIFE	75,000
Total ▶ 3a				744,812

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
VERA BRADLEY FOUNDATION FOR BREAST CANCER 12420 STONEBRIDGE ROAD ROANOKE, IN 46783	NONE	PUBLIC CHARITY	BREAST CANCER RESEARCH	50,000
VINCENT VILLAGE INC 2827 HOLTON AVENUE FORT WAYNE, IN 46806	NONE	PUBLIC CHARITY	COMMUNITY LIFE	2,500
YELLOWSTONE CLUB COMMUNITY FOUNDATION 1111 RESEARCH DR UNIT B BOZEMAN, MT 59718	NONE	PUBLIC CHARITY	COMMUNITY LIFE	5,000
Total ▶ 3a				744,812

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	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
Name and address (home or business)				
a <i>Paid during the year</i>				
YMCA40 LEGGS HILL ROAD MARBLEHEAD, MA 01945	NONE	PUBLIC CHARITY	COMMUNITY LIFE	2,000
YOU GOTTA BELIEVE YOUTH INC 535 8TH AVENUE SUITE 1400 NEW YORK, NY 10018	NONE	PUBLIC CHARITY	COMMUNITY LIFE	25,000
Total ▶ 3a				744,812

TY 2018 Accounting Fees Schedule

Name: BARBARA BRADLEY BAEKGAARD FAMILY
FOUNDATION C/O JOAN BYRNE HALL TRUSTEE

EIN: 80-0670424

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	6,390	1,598	0	0

TY 2018 Investments Corporate Stock Schedule

Name: BARBARA BRADLEY BAEKGAARD FAMILY
FOUNDATION C/O JOAN BYRNE HALL TRUSTEE
EIN: 80-0670424

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
MARKETABLE SECURITIES	2,185,946	3,501,107

TY 2018 Legal Fees Schedule

Name: BARBARA BRADLEY BAEKGAARD FAMILY
FOUNDATION C/O JOAN BYRNE HALL TRUSTEE

EIN: 80-0670424

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ATTORNEY FEES	153	77	0	0

TY 2018 Other Decreases Schedule

Name: BARBARA BRADLEY BAEKGAARD FAMILY
FOUNDATION C/O JOAN BYRNE HALL TRUSTEE

EIN: 80-0670424

Description	Amount
OTHER UNREALIZED GAIN	3,791

TY 2018 Other Increases Schedule

Name: BARBARA BRADLEY BAEKGAARD FAMILY
FOUNDATION C/O JOAN BYRNE HALL TRUSTEE

EIN: 80-0670424

Description	Amount
UNREALIZED GAIN ON SECURITIES DONATED FROM FOUNDATION	285,012

TY 2018 Other Professional Fees Schedule

Name: BARBARA BRADLEY BAEKGAARD FAMILY
FOUNDATION C/O JOAN BYRNE HALL TRUSTEE

EIN: 80-0670424

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	12,673	12,673	0	0
CONSULTING FEES	0	0	0	0

**TY 2018 Substantial Contributors
Schedule**

Name: BARBARA BRADLEY BAEKGAARD FAMILY
FOUNDATION C/O JOAN BYRNE HALL TRUSTEE

EIN: 80-0670424

Name	Address
JOAN BYRNE HALL	7 SPRING MILL LANE HAVERFORD, PA 19041
ANNE-MARIE RAY	11008 TURNBERRY CT FORT WAYNE, IN 46814
THOMAS BYRNE	13114 PERRY LAKE CT FORT WAYNE, IN 46845
JAMES BYRNE	2 WALLINGFORD ROAD MARBLEHEAD, MA 01945
BARBARA B BAEKGAARD	11003 HIGHCLERE PLACE FORT WAYNE, IN 46814

TY 2018 Taxes Schedule

Name: BARBARA BRADLEY BAEKGAARD FAMILY
FOUNDATION C/O JOAN BYRNE HALL TRUSTEE

EIN: 80-0670424

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAX	733	733	0	0