2949106000301 **Return of Private Foundation**

Department of the Treasury Internal Revenue Service

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

Do not enter social security numbers on this form as it may be made public ► Go to www.irs.gov/Form990PFfor instructions and the latest information

Open to Public Inspection

	F	or ca	lendar year 2018 or	tax	year begin	ning		10	/01 ,20	18, <u>and</u> (ending		4	09/30,2019
	Name of foundation SIMONSON FAMILY CHARITABLE FOUNDATION Number and street (or P O. box number if mail is not delivered to street address) Room/suite					A Employerid	lentif	ication number						
							37-	-656 <u>03</u> 85						
						'suite	B Telephone n	umb	er (see instructions)					
														1
		P.0	. BOX 419248							- 1			81	16-234-2000
			own, state or province, cou	ntry,	, and ZIP or fore	eign post	al code							
												C If exemption a pending, chec	pplica k here	otion is
	_	KAN	SAS CITY, MO 6	641	141-6248							ponding, and		
	2080	Che	ck all that apply:		Initial return	n		Initial return	of a forme	r public o	harity	D 1 Foreign org	janizat	tions, check here >
	7				Final return)		Amended r	eturn					tions meeting the
	4				Address ch	ange		Name chan	ge					nere and attach
		Che	ck type of organization	on:	X Section	n 501	(c <u>)(3)</u> e	exempt private	foundation	(ŊL	F If private four	dation	status was terminated
í	\mathbb{Z}		ection 4947(a)(1) none					Other taxable p		dation \	17			n)(1)(A), check here
	1		market value of a				_	method: X	Cash 🔙 A	ccrual	,	F If the foundati	on is i	n a 60-month termination
:	世		of year (from Part II,					pecify)				under section	507(b	o)(1)(B), check here .
₩.	ă_		▶ \$ 2,167			· ·		(d) must be on a	ash basis.)					(4) DF
	ξĿ	art	Analysis of Revenu	ie a	and Expense	s (The	1 (4)	Revenue and	(b) Net u	nvestment		(c) Adjusted net	•	(d) Disbursements for charitable
EWELOPE			may not necessarily e	qua	I the amounts		e	expenses per books		ome		income		purposes (cash basis only)
GWEO	<u> </u>		column (a) (see instru								+-			(casii basis oniy)
, [6	-1	1	Contributions, gifts, grants, etc		ceived (attach sch ition is not requi		<u> </u>			·				
121	$\boldsymbol{\lambda}$	2	attach So	ch. E	3			-			+			1
//*	1	3	Interest on savings and ter		•			E2 4E2		52,45	- -			
		4	Dividends and interest					52,452	-	32,43				- 1
		5a	Gross rents				. ~			2 C	- f	* p - 0	٠,٥	2 007 1
	4.		Net rental income or (loss				-	10,934		<u>ــــ ـــــ</u>	-	3) à
	ğ	ba b	Net gain or (loss) from sal Gross sales price for all	е от	assets not on II	, 836 .	P2.2 10 11			H.	2 72		LBAYE.	اسور خدید د د د د
	Revenue	7	assets on line 6a Capital gain net income	a Ife			. 0			10,93		- A.	· ;	7 g g g
	Re	8	Net short-term capital					- H- ~ H	3 4 4					100
		9	Income modifications	_) <u> </u>		R	ECE	IVFD	7	
			Gross sales less returns and allowances				Co.	W.,	, 1	6	,	70	3	
_		ь	Less Cost of goods sold	- 1			٠ , ٠	<u>ن ي الأ</u>	, , ,	8 , t	FR_1	9 '2020 S		i
2070		J	Gross profit or (loss) (at		h schedule)		1		, og (S		0.1
9		11	Other income (attach s	che	dule)							<u></u>	L	1 4 6 60 0 E 0 11
7	<u>-</u>	12	Total. Add lines 1 thro	ugh	11			 63,386			847F	N, UT	_	
83		13	Compensation of officers,	dıre	ctors, trustees,	etc	ļ	20,300		15,64			, 	4,660.
٠	ses	14 15 16a	Other employee salarie	s ar	nd wages		ļ		<u> </u>	NO			NE	· · · · · · · · · · · · · · · · · · ·
_ c	en	15	Pension plans, employe	ee b	enefits		ļ		ļ	NO	NE	No	ONE	
21 Received In Batching Ogden	.x	16a	Legal fees (attach sche	dule	e)				-		_			
2 gs	e H	ь	Accounting fees (attack											
쫎녍	ĕ	C	Other professional fees											
ar ag	itra	17	Interest					1 506						
7	Administrative	18	Taxes (attach schedule			•		1,586	+					10 parts 10, " 2 3]
	Ē	19	Depreciation (attach so						+					3 22 1 - No. 201
	Ψ	20	Occupancy					=	 	NO	NF	NI	ONE	
0 1 2020	pu	21 22	Travel, conferences, an Printing and publication		=				 	NO			ONE	
7	e G	22	Other expenses (attach				<u> </u>			110	-`-	144	J = 1 L	
7	ij	24	Total operating and ac	dmi	nictrativa ovn	oncac			†					
-	era.		Add lines 13 through 3	23.	ou au ve exp			21,886]	15,64	o.l	No	ONE	4,660.
ij	ğ	23 24 25	Contributions, aifts, are	ante	paid		<u> </u>	103,500					, d., 0'	103,500.
7		26	Total expenses and disburse	ment	ts Add lines 24	and 25		125,386		15,64			ONE	
品	_	27	Subtract line 26 from I	ıne	12						0 0 0	E ,	σ,	* 0 "9
Z		a	Excess of revenue over ex	xpen	ses and disburs	sements	L	-62,000	a * 3	жа. е. С. д			<u>.</u>	اد محصر مثر که ۱
Z		ь	Net investment incom	ie (ii	f negative, en	ter -0-)	in-		-1	47,74	6.7	2 agus 1 10 9	•	; w
ي		c	Adjusted net income ((if ne	egative, enter	-0-)					4			
\(\tilde{V}_{\tilde{F}} \)	A Fo	r Pap	Add lines 13 through 2 Contributions, gifts, gra Total expenses and disburse Subtract line 26 from I Excess of revenue over ex Net investment income Adjusted net income (erwork Reduction Act	Not	tice, see instr	uctions							<u>, </u>	Form 990-PF (2018)
85	. 14 10	, 000	ENF411 D73X 02	2/1	L2/2020	15:15	5:09						_	つ う 5 - ご

Б	art II	Dolomas Chasta	Attached schedules and amounts in the	Beginning of year	. End	of year
	art II	Balance Sneets	description column should be for end-of-year amounts only (See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-beari	ng			
	2	Savings and temporary of	ng	6,485.	4,235	. 4,235
		Accounts receivable		<u></u>		
		Less allowance for doub	otful accounts >			
	4	Pledges receivable				<u> </u>
		Less allowance for doub	otful accounts >			
			 	-		
			officers, directors, trustees, and other			
			ach schedule) (see instructions)			
			eceivable (attach schedule)			
			otful accounts NONE			
2			se			
Assets			eferred charges			
As			government obligations (attach schedule)			
			stock (attach schedule) STMT A	1,259,034.	1,264,088	1,518,494
	C	Investments - corporate	bonds (attach schedule) STMT . A	642,020.	593,712	. 602,635
	11	Investments - land, building: and equipment basis	s, >			
		Less accumulated deprecia	tion >			
		(attach schedule)	loans		·	
			ch schedule)			
		Land, buildings, and equipment, basis	>	-		
		Less' accumulated deprecia	tion			
	15	(attach schedule) Other assets (describe >	ALTERNATIVE INVESTMENTS)	56,400.	39,900	41,999.
			completed by all filers - see the			
			age 1, item I)	1,963,939.	1,901,935	2,167,363.
\neg			ccrued expenses			
						1
S		* *				1
Liabilities			rs, trustees, and other disqualified persons.			1 - 2
<u>ā</u>			tes payable (attach schedule)			1 2 8 8 W
اڐ			:▶)			
						99.
\perp	23	Total liabilities (add line:	s 17 through 22)		NONI	, , , , ,
		Foundations that follow	/ SFAS 117, check here ▶			0 4 5 m 20 5 m 2
ces		and complete lines 24 t	through 26, and lines 30 and 31.			
	24	Unrestricted				
펿	25	Temporarily restricted .		· .		ingraper of the second
						-
			t follow SFAS 117, check here ▶ X			1 80 2 344
띰		and complete lines 27 t	through 31.			. ""
0	27	Capital stock, trust princi	pal, or current funds	1,963,939.	1,901,935	5 % - 1 6 0 3 5 4 9
ets	28	Paid-in or capital surplus, or	land, bldg , and equipment fund			See TAU A
SS	29	Retained earnings, accumula	ated income, endowment, or other funds			A M WE WATER
Net Assets or Fund Balan	30	Total net assets or fund	I balances (see instructions)	1,963,939.	1,901,935	0 0 8 40 An
ž	31	Total liabilities and	net assets/fund balances (see			The same of the sa
┙				1,963,939.	1,901,935	14 8 5 WE WIND
P	art III	Analysis of Chan	iges in Net Assets or Fund Balar	nces		Т
1			palances at beginning of year - Part I			1 000 000
			d on prior year's return)			1,963,939.
			line 27a			-62,000.
4						1,901,939.
5			line 2 (itemize) ► ROUNDING		5_	4.
6	Tota	I net assets or fund ba	alances at end of year (line 4 minus li	ne 5) - Part II, column (b), line 30 6 _	1,901,935.
			•			Form 990-PF (2018)

Pai	t IV Capital Gains	s and Losses for Tax on Inve	estment Income			
		scribe the kind(s) of property sold (for e rick warehouse, or common stock, 200		(b) How acquired P - Purchase D - Donation		(d) Date sold (mo., day, yr)
1 a	PUBLICLY TRADED	SECURITIES				
<u>b</u>						
<u>c</u>				1		
d						
<u>e</u>		(f) Depreciation allowed	(g) Cost or other basis		(h) Gain or (lo	ss)
	(e) Gross sales price	(or allowable)	plus expense of sale		((e) plus (f) mini	
а	151,836.		140,902.			10,934.
<u>b</u>	· · · · · · · · · · · · · · · · · · ·					
<u>c</u>						
<u>d</u>			-			
		nowing gain in column (h) and owned b	y the foundation on 12/31/69.	(I)	Gains (Col (h) ga	un minus
	(i) FMV as of 12/31/69	(j) Adjusted basis	(k) Excess of col. (ı)		(k), but not less t	han -0-) or
	(I) FIVIV 25 01 12/31/09	as of 12/31/69	over col (j), if any		Losses (from co	
<u>a</u>	-		•			10,934.
<u>b</u>	· <u>-</u>		-			
<u>c</u>						
e						
2	Capital gain net income	or (not capital loce)	un, also enter in Part I, line 7			
		(17 (10	oss), enter -0- in Part I, line 7	2	_	10,934.
3	Net short-term capital ga	ain or (loss) as defined in sections f art I, line 8, column (c). See inst	1222(5) and (6):			
				3		
Par	·	Inder Section 4940(e) for Redu				
Was		leave this part blank. the section 4942 tax on the distrib 't qualify under section 4940(e). Do		ase perio	d?	Yes X No
1	Enter the appropriate an	nount in each column for each year	r; see the instructions before makir	ng any en	tries.	
~~ Cale	(a) Base period years indar year (or tax year beginning in)	(b) Adjusted qualifying distributions.	(c) Net value of noncharitable-use assets		(d) Distribution ra (col (b) divided by	
	2017	103,374.	2,224,997.			0.046460
	2016	87,295.	2,061,966.			0.042336
	2015	78,536.	1,960,533.	·		0.040058
	2014	62,097. 13,464.	<u>2,080,504.</u> 1,961,915.		_	0.029847
	2013	13,404.	1,301,313.			0.000003
2	Total of line 1, column (d)		2	-	0.165564
3		io for the 5-year base period - divid				
	the number of years the	foundation has been in existence i	fless than 5 years	3		0.033113
4	Enter the net value of no	oncharitable-use assets for 2018 fro	om Part X. line 5	4	2,	140,360.
•				_		
5	Multiply line 4 by line 3.			5		70,874.
6	Enter 1% of net investme	ent income (1% of Part I, line 27b)		6		477.
7	Add lines 5 and 6			7		71,351.
8	Enter qualifying distribut	tions from Part XII, line 4		8		108,160.
	If line 8 is equal to or g Part VI instructions.	greater than line 7, check the box	in Part VI, line 1b, and complete	that part	using a 1% tax	rate. See the

3

The first the amount of line 10 to be Credited to 2019 estimated tax ▶ 823. Refunded ▶ 11 Part VIIA Statements Regarding Activities 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? b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition. if the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities. C Did the foundation file Form 1120-POL for this year? d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year. (1) On the foundation. ▶ \$ (2) On foundation managers ▶ \$ E Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ 2 Has the foundation engaged in any activities that have not previously been reported to the IRS? 2 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 detailed description of the activities. 4 If "Yes," attach a detailed description of the activities and copies of any materials in the state in the activities and copies of any materials are instructed as a foundation managers ▶ \$ 2 Has the foundation engaged in any activities that have not previously been reported to the IRS? 2 Has the foundation have unrelated business gross income of \$1,000 or more during the year? 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? 6 Are the requirements of section 5089(c) (relating to sections 4941 through 4945) satisfied either. 8 By language in the governing instr	Par	Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see	instruc	ction	s)
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ► V_2 and enter tive of Part I, line 27b. All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12b. All other domestic soundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12b. All other domestic soundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12b. And lines 1 and 2 2 NONDE A did lines 2 NonDerpayment credited to 2018 or time to file from 888 or time to line 1 nonde 1	1a	Exempt operating foundations described in section 4940(d)(2), check here and enter "N/A" on line 1			1
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ► V_2 and enter tive of Part I, line 27b. All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12b. All other domestic soundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12b. All other domestic soundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12b. And lines 1 and 2 2 NONDE A did lines 2 NonDerpayment credited to 2018 or time to file from 888 or time to line 1 nonde 1		Date of ruling or determination letter (attach copy of letter if necessary - see instructions)			
a. 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-) 3. Add lines 1 and 2. 3. Add lines 1 and 2. 4. Subtetti & Income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-) 5. Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5. Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 6. Cradstx/Payments. 2 2018 estimated tax payments and 2017 overpayment credited to 2018. 5. Exempt foreign organizations - tax withheld at source. 6. B. NONE 6. NONE 7. Total credits and payments. Add lines 6a through 6d. 7. Total credits and payments. Add lines 6a through 6d. 8. Einter any penalty for underpayment of estimated tax. Check hear in left form 2220 is situated. 8. Einter any penalty for underpayment of estimated tax. Check hear in left form 2220 is situated. 9. Tax due. If the total of lines 3 and 8, enter the amount overal. 9. Tax due. If the total of lines 3 and 8, enter the amount overal. 9. Tax due. If the total of lines 3 and 8, enter the amount overal. 9. Tax due. If the total of lines 3 and 8, enter the amount overal. 9. Tax due. If the total of lines 3 and 8, enter the amount overal. 9. Tax due. If the total of lines 3 and 8, enter the amount overal. 9. Tax due. If the total of lines 3 and 8, enter the amount overal. 9. Tax due. If the total of lines 3 and 8, enter the amount overal. 9. Tax due. If the say are, dut the foundation attempt to influence any national, state, or local legislation or did it in the state to the foundation and the foundation attempt to influence any national, state, or local legislation or did it in the state to the foundation attempt to influence any nationals, state, or local legislation or did it in the sta	b			4	<u>:77.</u>
Part Line 12, col (b). 2 Tax under section 511 Idomestic section 4947(a)(1) trusts and taxable foundations only, others, enter-O-1 3 Add lines 1 and 2		here X and enter 1% of Part I, line 27b			- 1
NONE Tax under section 511 (domestic section 4947/a f 1) trusts and taxable foundations only, others, enter -0-) Add lines 1 and 2. Add lines 1 and 2. Subhtita A (income) tax (domestic section 4947/a f 1) trusts and taxable foundations only, others, enter -0 Subhtita A (income) tax (domestic section 4947/a f 1) trusts and taxable foundations only, others, enter -0 Tax based on investment income. Subtract line 4 from line 3.1 zero or less, enter -0 Credits/Peyments. 2018 estimated tax payments and 2017 overpayment credited to 2018. 6s	c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of J			
3 Add lines 1 and 2 4 Subtitle A (income) tax (domestic section 4947(a)t1) trusts and taxabla foundations only, others, enter -0- 5 Tax based on investment incomes. Subtract line 4 from hine 3.1 / zero or less, enter -0- 6 Credit/Payments. 8 2018 estimated tax payments and 2017 overpayment credited to 2018.		Part I, line 12, col (b).			
Subtitle A (income) tax (domestic section 4947(a(1)) trusts and taxable foundations only, others, enter -0-) Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0 Credits/Payments. a 2018 estimated tax payments and 2017 overpayment credited to 2018. 68	2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)			
Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter-0- 5 477. Conditing/Payments and 2017 overpayment credited to 2018. 6s 1, 300. 5	3	Add lines 1 and 2			
6 Credits/Psyments. a 2018 estimated tax payments and 2017 overpayment credited to 2018. 6s 1,300. 6c NONE b Exempt foreign organizations - tax withheld at source. 6b NONE d Backup withholding erroneously withheld 7 Total credits and payments. Add lines 6 at through 6d . 6d NONE 8 Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached 8 Tax due. If the total of lines 5 and 8 is more than his 7, enter amount ower 100 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 100 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 100 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 100 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 100 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 100 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 100 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 100 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 100 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 110 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount of line 100 to the Credited total 110 Overpayment. If line 7 is more than 110 Overpayment overpaid 110 Overpayment. If line 7 is more than 110 Overpayment overpaid 110 Overpayment overpaid 110 Overpayment 110 Ov	4	Subtitle A (income) tax (domestic section 4547/a)(1) trusts and taxable foundations only, others, enter -0-7	·		
a 2018 estimated tax payments and 2017 overpayment redited to 2018. 6s 1,300. b Exempt foreign organizations - tax withheld at source. 6b NONE c Tax paid with application for extension of time to file (Form 8868) 6c NONE d Sackup withholding erroneously withheld 6t Source 7 Total credits and payments. Add lines 8 at through 6d 7 Total credits and payments. Add lines 8 at through 6d 7 Total credits and payments. Add lines 8 at through 6d 7 Total credits and payments. Add lines 8 at through 6d 7 Total credits and payments. Add lines 8 at through 6d 7 Total credits and payments. Add lines 8 at through 6d 8 Exter any penalty for underpayment of estimated tax. Check here 1 form 2220 is attached 8 8 1 Total of lines 7 and 8 is more than line 7, enter amount owed 9 100 Se23. The 1 Total credits in the 100 to be Credited to 2019 estimated tax. P 823 Refunded 1 Total 1 Total of line 10 to be Credited to 2019 estimated tax. P 823 Refunded 1 Total 1 Total 1 Total 1 Total 2 Total 1 Total 2 Tota	5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0		4	:77 <u>.</u>
b Exempt foreign organizations - tax withheld at source. Tax paid with application for extension of time to file (form 8868). Bed SONE Total credits and payments. Add lines 6s through 6d. Total credits and payments. Add lines 6s through 6d. Total credits and payments. Add lines 6s through 6d. Total credits and payments. Add lines 6s through 6d. Total credits and payments. Add lines 6s and 8s more than line 7, enter amount owed. Total credits and payments. Add lines 5s and 8 through 6d. Total credits and payments. Add lines 5s and 8s more than line 7, enter amount owed. Total credits and payments. Add lines 5s and 8, enter the amount overpaid. The file amount of line 10 to be Credited to 2019 astimated tax ▶ 82.3. Refunded ▶ 11 Fort VIII-A Statements Regarding Activities Total burning 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? Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition. If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation on connection with the activities. Did the foundation ite form 1120-POL for this year? It is a state of the foundation in a connection with the activities. Has the foundation imade any changes, not previously been reported to the IRS: Has the foundation made any changes, not previously reported to the IRS: Has the foundation made any changes, not previously reported to the IRS: The results of the foundation of the activities the have not previously reported to the IRS: Was there allowed the foundation of the activities and foundation found the payment of the foundation have unrelated business gross income of \$1,000 or more during the year? The results of the foundation have at least \$5,000 in asesets at any time during the year? "Yes," complete Part III, col.	6				
Tax paid with application for extension of time to file (Form 8868). Ge	а			_	
Sackup withholding erroneously withheld Sackup withholding erroneously with erroneo	b	Example foreign organizations to the state of the state o			- 1
To Total credits and payments. Add lines 6a through 6d	C	Tax paid with application for extension of time to the from edge,			
8 Enter any penalty for underpayment of estimated tax. Check here	d	Backup withholding erroneously withheld			
Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 10 823.				1,3	00.
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 823. Enter the amount of line 10 to be Credited to 2019 estimated tax ▶ 823. Refunded 11 Port VIPA Statements Regarding Activities 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? b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition. If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities. C Did the foundation file Form 1120-POL for this year? E Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ E Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ 2 Has the foundation maged any changes, not previously been reported to the IRS? 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 detailed description of the activities. 3 Has the foundation hande 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 b If 'Yes,' attach a detailed description of the activities. 3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, and the statement required by General Instruction of the confidence of the changes 3 X b If 'Yes,' attach he statement required by General Instruction of the confidence of the changes and the state law remain in the governing instrument? b If the answer is "Yes" to					
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names and addresses		·	3		
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Par	t 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			1
	meaning of section 512(b)(13)? If "Yes," attach schedule See instructions	11		Х
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		Х
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
	Website address ► N/A		<u> </u>	
14	The books are in care of ► SEE STATEMENT 1 Telephone no. ►			
14	Located at ► ZIP+4 ►			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here		•	\Box
15	and enter the amount of tax-exempt interest received or accrued during the year	• • •		
16	At any time during calendar year 2018, did the foundation have an interest in or a signature or other authority		Yes	No
16	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			
Dan	the foreign country ► t VII-B Statements Regarding Activities for Which Form 4720 May Be Required	<u>'</u>		<u>. </u>
rai	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.	<u> </u>	Yes	No
		<u> </u>		
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 X No	ľ		
	(1,) 4.19-91	ŀ		
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a			
		ľ		1 1
	(*)	ŀ		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?X Yes No	ĺ		
	(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)?	ļ		
	(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			1
	termination of government service, if terminating within 90 days)			ایها
Ь	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations			- 8
	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	ه في	ຜວວ	0,0
С	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	~ 10.00	X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private		o°	
	operating foundation defined in section 4942(j)(3) or 4942(j)(5))	jo ,	ុំ៖	م
а	At the end of tax year 2018, did the foundation have any undistributed income (lines 6d and	ا م	o o	ه ه
	6e, Part XIII) for tax year(s) beginning before 2018? Yes X No		מ ש	
• •	If "Yes," list the years - ,,,,	0	St. Alex Str. Will	·
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2)	à	ا د	-
	(relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to		- 0	
	all years listed, answer "No" and attach statement - see instructions.)	2b	10	- 5-9
C	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.		1	۰.۵
	<u> </u>	90	0 90×	[
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise	B	ئـــــــــــــــــــــــــــــــــــــ	B 0
	at any time during the year?	0 0	000	Po
b	If "Yes," did it have excess business holdings in 2018 as a result of (1) any purchase by the foundation or	6	3 2 2	0 968
	disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the	200		8 4 0
	Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of	Spo Oct	1 200	3° 78
	the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the	2000	3 883	<u> </u>
	foundation had excess business holdings in 2018.)	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its	9000		₂ , 3
	charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2018?	4b		Х
		00	A DE	/2010

	t VII-B Statements Regarding Activities f	or Which Form	1720 May Be Red	uired (continued)			
5a	During the year, did the foundation pay or incur any amo		-		i.	Yes	No
	(1) Carry on propaganda, or otherwise attempt to influe	nce legislation (section	n 4945(e))?	. Yes X No	, , , , ,		
	(2) Influence the outcome of any specific public ele						
	directly or indirectly, any voter registration drive?			. Yes X No	o	Ì	
	(3) Provide a grant to an individual for travel, study, or o	ther similar purposes	,	. Yes X No	o		
	(4) Provide a grant to an organization other than a						
	section 4945(d)(4)(A)? See instructions			Yes X No	o	1	
	(5) Provide for any purpose other than religious, ch	naritable, scientific,	literary, or education	al			
	purposes, or for the prevention of cruelty to children				1 1		
b	If any answer is "Yes" to 5a(1)-(5), did any of the	transactions fail to	qualify under the	exceptions described in	n		
	Regulations section 53 4945 or in a current notice regar	ding disaster assistar	ice? See instructions.		5ь 📗		
	Organizations relying on a current notice regarding disas	ter assistance, check	here	▶			
C	If the answer is "Yes" to question 5a(4), does the	foundation claim e	xemption from the	tax			
	because it maintained expenditure responsibility for the	grant?		. Yes No	•		
	If "Yes," attach the statement required by Regulations se	ction 53.4945-5(d).					
6a	Did the foundation, during the year, receive any fur	nds, directly or indir	ectly, to pay premiu				
	on a personal benefit contract?						
b	Did the foundation, during the year, pay premiums, direc	tly or indirectly, on a	personal benefit contr	act?	. <u>6b</u>		Х
	If "Yes" to 6b, file Form 8870.						
7a	At any time during the tax year, was the foundation a pa						
b	If "Yes," did the foundation receive any proceeds or have			ion/	. 7 b		
8	Is the foundation subject to the section 4960 tax on pay						
	remuneration or excess parachute payment(s) during the tyll Information About Officers, Director	year/	ndation Manage	. Yes X No			
Par	and Contractors				pioyees,		
1	List all officers, directors, trustees, and foundation	(b) Title, and average	(c) Compensation	(d) Contributions to	(e) Expense	900011	nt
	(a) Name and address	hours per week devoted to position	(If not paid, enter -0-)	employee benefit plans and deferred compensation	other allo	wance	5
COMME	RCE TRUST COMPANY	TRUSTEE	-				
PO BO	X 419248, KANSAS CITY, MO 64141-6248	2	20,300.	-0-			-0
	Compensation of five highest-paid employees	/athan than than	a included on lin	. 1 instructio	nol If no	no 6	ntor
2	"NONE."	tother than thos	e iliciuaeu on ilii	e i - see mstruction	<i>J</i> 113 <i>]</i> . II 110	116, 6	:11161
		(b) Title, and average	(1)05	(d) Contributions to employee benefit	(e) Expense	accon	nt.
(a)	Name and address of each employee paid more than \$50,000	hours per week devoted to position	(c) Compensation	plans and deferred compensation	other allo	wances	3
	·		-	compensation			
NON			NONE	NONE	NO	ONE	
IVOIV			1101112				
]	•				
			11.9/1-				-
		1		I			
				i i			
Total	number of other employees paid over \$50,000		<u></u>		NO	ONE	

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Page	

Form 990-PF (2018)		Page 7
Part VIII Information About Officers, Directors, Trustees, Foundation Managers, and Contractors (continued)	Highly Paid Employ	/ees,
3 Five highest-paid independent contractors for professional services. See instructions.	If none, enter "NONE	11
(a) Name and address of each person paid more than \$50,000 (I	b) Type of service	(c) Compensation
NONE		NONE
Total number of others receiving over \$50,000 for professional services		NONE
Part IX-A Summary of Direct Charitable Activities		
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical informatio organizations and other beneficiaries served, conferences convened, research papers produced, etc.	n such as the number of	Expenses
1NONE		
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
1NONE		
2		
All share we related according to the control of th	- 12	·
All other program-related investments. See instructions 3NONE		
Total Add lines 1 through 2		

Par	Minimum Investment Return (All domestic foundations must complete this part. Fore see instructions.)	ign foundations,	
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes.		
а	Average monthly fair market value of securities	1a	2,105,382.
b		1b	67,572.
C		1c	NONE
d		1d	2,172,954.
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation)		
2	Acquisition indebtedness applicable to line 1 assets	2	NONE_
3	Subtract line 2 from line 1d	3	2,172,954.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see		
	instructions)	4	32,594.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,140,360.
6	Minimum investment return. Enter 5% of line 5	6	107,018.
Par	TXI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foun and certain foreign organizations, check here ▶ and do not complete this part.)	ıdations	
1	Minimum investment return from Part X, line 6	1	107,018.
2 a	Tax on investment income for 2018 from Part VI, line 5 2a 477.		
b	Income tax for 2018. (This does not include the tax from Part VI.) 2b		
С		2c	477.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	106,541.
4	Recoveries of amounts treated as qualifying distributions	4	NONE
5	Add lines 3 and 4	5	106,541.
6	Deduction from distributable amount (see instructions)	6	NONE
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII,		
	line 1	7	106,541.
	t XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:	10 0 C	100 160
a		1a	108,160.
	Program-related investments - total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc.,		MONTH
_	purposes	2	NONE
3	Amounts set aside for specific charitable projects that satisfy the		MONTH
a	, ,,	3a	NONE
	Cash distribution test (attach the required schedule)	3b	NONE
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	108,160.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income.	_	477
_	Enter 1% of Part I, line 27b. See instructions	5	477.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	107,683.
	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when cal qualifies for the section 4940(e) reduction of tax in those years.	iculating whether	the foundation

Form **990-PF** (2018)

2 Undistributed income, if any, as of the end of 2018 a Enter amount for 2017 only	Pa	rt XIII Undistributed Income (see inst	ructions)			
Distributable amount for 2018 from Part II, line 7 2 Undistributed income, if any, as of the end of 2018 Enter amount for 2017 only 5 Excess distributions carryover, of any, to 2018 From 2015 From 2015 From 2015 From 2015 From 2016 From 2017 From 2017 NONE NONE NONE NONE NONE NONE NONE NON		-	(a)	(b)	(c)	
2 Undestributed recome, if any, as of the end of 2018 a Enter amount for 2017 only. 3 Excess distributions corryover, if any, to 2018 h From 2014 NONE 5 From 2014 NONE 6 From 2016 NONE 7 Total of lines 3a through e . 4 Qualifying distributions for 2018 from Part XII, line 4 \$ \$ 108,150. A papited to 2017, but not more than line 2a . 5 Applied to undistribution come of prior years (Election required -see instructions). 7 Freath and estitibutions carryover applied to 2018 (If an amount appears in column (4), the same amount must be shown in column (s). 8 Excess distributions carryover applied to 2018 (If an amount appears in column (4), the same amount must be shown in column (s). 9 Enter the nat total of each column as indicated below: 10 Corpus. Add lines 3f, 4c, and 4e. Subtract line 5 h Prior years undestributed income for which a notice of deficiency has been issued, or on which the section 942(a) tas has been previously assessed. 9 Undistributed income for 2018. Subtract lines 4d from line 20. 10 Undistributed income for 2018. Subtract lines 4d from line 20. 10 Undistributed income for 2018. Subtract lines 4d and 5 from line 10. This amount must be during the form line 1. This amount must be during distributions carryover from 2013 not applied on line 5 or line 7 (see enstructions). 9 Excess distributions carryover from 2013 not applied on line 5 or line 7 (see enstructions). 10 Analyses of line 9. 10 Excess from 2015 NONE 10 Analyses of line 9. 2 Excess from 2015 NONE 2 Excess from 2015 NONE 2 Excess from 2015 NONE 2 Excess from 2016 NONE 2 Excess from 2017 NONE 2 Excess from 2016 NONE 2 Excess from 2017 NONE 3 Excess from 2016 NONE 4 Excess from 2017 NONE 4 Excess from 2017 NONE 5 Excess from 2016 NONE 5 Excess from 2017 NONE 6 Excess from 2017 NONE 8 Excess from 2016 NONE 8 Excess from 2017 NONE	1	Distributable amount for 2018 from Part XI,	Corpus	Years prior to 2017	2017	2018
a Enter amount for 2017 only, b Total for proryears 20		line 7		,		106,541.
D Total for proryears 20	2	Undistributed income, if any, as of the end of 2018				
3 Excess distributions carryever, if any, to 2018 a From 2013	а	Enter amount for 2017 only				
a From 2013 NONE b From 2014 NONE c From 2015 NONE d From 2015 NONE d From 2016 NONE d From 2017 None of pror years (Electon required - see instructions) d Applied to 2018 distributions out of corpus (Electon required - see instructions) d Applied to 2018 distribution out of corpus (Electon required - see instructions) d Applied to 2018 distribution out of corpus (Electon required - see instructions) d Applied to 2018 distribution out of corpus (Electon required - see instructions) d Applied to 2018 distribution out of corpus (Electon required - see instructions) d Applied to 2018 distribution out of corpus (Electon required - see instructions) d Applied to 2018 distribution out of corpus (Electon required - see instructions) d Applied to 2018 distribution out of corpus (Electon required - see instructions) d Applied to 2018 distribution out of corpus (Indiana to the see instructions) d Applied to 2016 None d Applied to 2016 None d N	b	Total for prior years 20,20,20		NONE NONE		
b From 2014	3	i				
From 2015 NONE ## From 2016 NONE ## From 2017 NONE ## Prom 2017 NONE ## Prom 2017 NONE ## Prom 2017 NONE ## Prom 2017 NONE ## From 2017 NONE ## From 2017 NONE ## Prom 2017 NONE ## From 2017 NONE ## From 2017 NONE ## From 2018 distribution undercore applied to 2018 (iff an amount appears in column (a)). ## From 2018 NONE ## From 2018 NONE ## From 2018 NONE ## Prom 2018 NONE	а	1101112010				
From 2016 NONE	Ь	110111 2011 1111				
From 2017 NONE NONE 1 Total of lines 3a through e NONE 1 Day 160 NONE NONE 1 Day 160 NONE 2 Day 160 NONE 2 Day 160 NONE 2 Day 160 NONE 3 Day 160 NONE 3 Day 160 NONE 4 Day 160 NONE 5 Day 160 NONE 4 Day 160 NONE 5 Day 160 NONE 5 Day 160 NONE 5 Day 160 NONE 6 Day 160 NONE 7 Day 160 NONE 8 Day 160 NONE 9 Day 160 NONE 1 Day 160 NONE 1 Day 160 NONE 1 Day 160	C	1101112010			•	
Total of lines 3a through e A Cusifying distributions for 2018 from Part XII, line 4 S 108, 1560. 103, 242	d	110111 2010				Ì
4 Qualifying distributions for 2018 from Pert XII, Ine 4 ▶ \$ 108,160. 3 Applied to 2017, but not more than line 2a. b Applied to undistributed income of prior years (Election required - see instructions) A Applied to sitributions out of corpus (Election required - see instructions) A Applied to 2018 distributions carryover applied to 2018 (iff an amount appears in column (di), the same amount must be shown in column (a). E Excess distributions carryover applied to 2018 (iff an amount appears in column (di), the same amount must be shown in column (a). C Enter the net total of each column as indicated below: C Corpus Add lines 3f, 4c, and 4e. Subtract line 5 P Prior years' undistributed income. Subtract line 4b from line 2b. C Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously sessed. Subtract line 6 from line 6b. Taxable amount see instructions Undistributed income for 2017. Subtract lines 4d and 5 from line 2. Taxable amount see instructions Undistributed income for 2018. Subtract lines 4d and 5 from line 2. Taxable amount see instructions Undistributed income for 2018. Subtract lines 4d and 5 from line 1. This amount must be distributed income for 2018. Subtract lines 4d and 5 from line 1. This amount must be distributed income for 2018. Subtract lines 4d and 5 from line 1. This amount must be distributed income for 2018. Subtract lines 5 inter 6 (see instructions). B Excess distributions carryover from 2013 not applied on line 5 or line 7 (see instructions). C Analysis of line 9. A Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a. NONE Excess from 2016. NONE Excess from 2016. NONE Excess from 2016. NONE Excess from 2016. NONE Excess from 2017. NONE	_	1101112017	NONE			<u> </u>
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5 Excess distributions carryover applied to 2018 (ff an amount appears in column (d), the same amount must be shown in column (a).) 6 Enter the net total of each column as indicated below: a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5 b Prior years' undistributed income. Subtract line 4 from line 2 b. c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed. d Subtract line 6c from line 6b. Taxable amount -see instructions. d Undistributed income for 2017. Subtract line 4a from line 2a. Taxable amount see instructions. f Undistributed income for 2018. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2019. 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required-see instructions). 8 Excess distributions carryover from 2013 not applied on line 5 or line 7 (see instructions). 9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a. NONE b Excess from 2015. NONE c Excess from 2016. NONE d Excess from 2016. NONE lexess from 2017. NONE lexess from 2018. NONE			NONE			
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	d		ا د معودات	M ₁ → 200 ,	, , , , , , , , , , , , , , , , , , ,	
	е	Excess from 2018 NONE	And Mary		r use militarismo	<u></u>

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).)

N/A

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.

N/A

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

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

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Page **11**

Part XV Supplementary Information (continued)							
3 Grants and Contributions Paid Durin	ng the Year or App		Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of	Purpose of grant or contribution	Amount			
Name and address (home or business)	or substantial contributor	recipient	contribution				
a Paid during the year							
SEE STATEMENT 12				103,500.			
•							
	-						
				,			
T 4.1				- 103-500 -			
h Approved for future payment				·103 , 500.			
b Approved for future payment							
Total			<u> ▶ 3b</u>				

Interest case amounts unless otherwise indicated. 1 Program service revenue 2 Mandount 1 Program service revenue 3 Mandount 4 Mandount 5 Mandount 5 Mandount 6 Mandoun	Part XVI-	A Analysis of Income-Produ	ucing Act	ivities			
a b	Enter gross a	amounts unless otherwise indicated.	(a)	(b)	(c)	(d)	
b Garage and contracts from government agencies See worksheet in line 13 instructions to verify calculations.) Substotal. Add columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculations.) Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)	1 Program	service revenue	Business code	Amount	Exclusion code	Amount	(See instructions.)
b Garage and contracts from government agencies See worksheet in line 13 instructions to verify calculations.) Substotal. Add columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculations.) Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)	a						
d e f g Fees and contracts from government agencies 2 Membership dues and assessments							
g Fees and contracts from government agencies 2 Membership dues and assessments 3 Interest on savings and temporary cash investments 4 Dividends and interest from securities 5 Net rental income or (loss) from real estate: a Debt-financed property 5 Net rental income or (loss) from personal property 7 Other investment income 8 Gain or (loss) from sales of assets other than inventory 9 Net income or (loss) from special events 10 Gross profit or (loss) from special events 11 Other revenue a 12 Subtotal. Add columns (b), (d), and (e) 2 C d 4 e 13 Total. Add line 12, columns (b), (d), and (e) 5 Size worksheet in line 13 instructions to verify calculations) Fart XVI-8 Relationship of Activities to the Accomplishment of Exempt Purposes Line No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)	c						
g Fees and contracts from government agenoies 2 Membership dues and assessments 3 Interest on avarings and temporary cash investments 4 Dividends and interest from securities 5 Net rental income or (loss) from real estate: a Debt-financed property 6 Net rental income or (loss) from personal property 7 Other investment income 8 Gain or (loss) from sales of assets other than inventory 9 Net income or (loss) from sales of inventory 11 Other revenue a b c d d e 12 Subtotal. Add columns (b), (d), and (e) CSee worksheat in line 13 instructions to verify calculations.) Part XVI-3 Relationship of Activities to the Accomplishment of Exempt Purposes Line No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes), (See instructions.)	d						
g Fees and contracts from government agencies 2 Membership dues and assessments	е						
2 Membership dues and assessments	f						
3 Interest on savings and temporary cash investments. 4 Dividends and interest from securities. 5 Net rental income or (loss) from real estate: a Debt-financed property. b Not debt-financed property. 7 Other investment income 8 Gain or (loss) from personal property 9 Net income or (loss) from sales of assets other than inventory. 10 Gross profit or (loss) from sales of inventory. 11 Other revenue a b c d d let a loss of loss from sales of inventory. 12 Subtotal. Add columns (b), (d), and (e)	g Fees	and contracts from government agencies					<u> </u>
4 Dividends and interest from securities 5 Net rental income or (loss) from real estate: a Debt-financed property b Not debt-financed property 7 Other investment income 8 Gain or (loss) from sales of assets other than inventory 9 Net income or (loss) from special events 10 Gross profit or (loss) from sales of inventory 11 Other revenue a b c d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total. Add line 12, columns (b), (d), and (e) 13 Total. Add line 12, columns (b), (d), and (e) 14 52,452. 16 Not extended in income or (loss) from personal property 18 10,934. 19 Net income or (loss) from special events 10 Gross profit or (loss) from sales of inventory 11 Other revenue a 12 Subtotal. Add columns (b), (d), and (e) 13 Total. Add line 12, columns (b), (d), and (e) 14 52,452. 15 Net rental income or (loss) from personal property 18 10,934. 19 Net income or (loss) from special events 19 Gain or (loss) from special events 10 Gross profit or (loss) from special events 10 Gross profit or (loss) from special events 11 Other revenue a 12 Subtotal. Add columns (b), (d), and (e) 13 Total. Add line 12, columns (b), (d), and (e) 14 52,452. 15 Not extended to personal property 16 Not extended to personal property 18 10,934. 19 34. 10,934. 10,	2 Members	ship dues and assessments					
S Net rental income or (loss) from real estate: a Debt-financed property	3 Interest or	n savings and temporary cash investments •			7.4	F0 450	
a Debt-financed property	4 Dividend	s and interest from securities			14	52,452.	
b Not debt-financed property	5 Net renta	al income or (loss) from real estate:		··········			
6 Net rental income or (loss) from personal property 7 Other investment income 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) 13 Total. Add line 12, columns (b), (d), and (e) 15 Relationship of Activities to the Accomplishment of Exempt Purposes Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)	a Debt-	financed property			-		
7 Other investment income	b Not d	lebt-financed property					
8 Gain or (loss) from sales of assets other than inventory 9 Net income or (loss) from special events 10 Gross profit or (loss) from sales of inventory 11 Other revenue a b c d e 12 Subtotal. Add columns (b), (d), and (e) 13 Total. Add line 12, columns (b), (d), and (e) See worksheet in line 13 instructions to verify calculations.) Part XVI-8 Relationship of Activities to the Accomplishment of Exempt Purposes Line No. Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)	6 Net renta	I income or (loss) from personal property					
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) 13 Total. Add line 12, columns (b), (d), and (e) 14 See worksheet in line 13 instructions to verify calculations.) Part XVI-8 Relationship of Activities to the Accomplishment of Exempt Purposes Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)	7 Other inv	vestment income			10	10 024	
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) CSee worksheet in line 12, columns (b), (d), and (e). See worksheet in line 13 instructions to verify calculations.) Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)	8 Gain or (Id	oss) from sales of assets other than inventory			18	10,934.	
11 Other revenue a b c d e 12 Subtotal. Add columns (b), (d), and (e)		•					
b c d d					-		· · -
c d e 12 Subtotal. Add columns (b), (d), and (e)							
d e 12 Subtotal. Add columns (b), (d), and (e)					 -		
e 12 Subtotal. Add columns (b), (d), and (e)							
12 Subtotal. Add columns (b), (d), and (e)					 -	-	
13 Total. Add line 12, columns (b), (d), and (e)	e	Add as lease as (b) (d) as d (s)			Z. 5 -	63 386	
Relationship of Activities to the Accomplishment of Exempt Purposes Line No. The No. In the Indian Separation of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)	12 Subtotal.	Add columns (b), (d), and (e)	<u> </u>		No - John	12	63 386
Relationship of Activities to the Accomplishment of Exempt Purposes Line No. ▼ Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)							03/300.
Line No. ▼ Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)	Part XVI-I	Relationship of Activities	to the A	ccomplishment of	Exempt Purp	ooses	
							
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	990-PF (···			<u>37-6560</u>				ge 13
Par	t XVII	Information F Exempt Orga	Regarding Tra nizations	nsfers to and Trans	actions a	and Relation	nships With No	nchari	table	!
1	Did th	e organization direct	ly or indirectly	engage in any of the follo	owing with	any other org	anization describe	d	Yes	No
				501(c)(3) organizations)						
		zations?		· ·						
а	Transf	ers from the reportin	g foundation to	a noncharitable exempt o	rganization	of:				
	(1) Ca	sh						. 1a(1)		X
	(2) Ot	her assets						. 1a(2)		_ X
b	Other	transactions.								
	(1) Sa	les of assets to a non	charitable exem	pt organization				1b(1)	<u> </u>	X
				e exempt organization						X
				assets						X
										X
										X
				or fundraising solicitatio						X
				s, other assets, or paid em						X
d				s," complete the following						
				es given by the reportin						
			7 -	ement, show in column		·				
(a) L	ine no	(b) Amount involved	(c) Name of no	oncharitable exempt organization	(d) (Description of tran	sfers, transactions, and	sharing arr	angeme	nts
			-							
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	+	-			-					
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	describ	-	(other than sect	liated with, or related to ion 501(c)(3)) or in section				. X Y	es	No
	11 103	(a) Name of organizatio		(b) Type of organizati	on		(c) Description of relat	onship		
SEE	STAT	EMENT 13								
				· · · · · · · · · · · · · · · · · · ·						

b If "Yes," complete the following schedule) <u>. </u>	
(a) Name of organization	(b) Type of organization	(c) Description of relationship
SEE STATEMENT 13		

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

May the IRS discuss this return

Sign	
Here	_

P Honal	less T. helson
Signature of offic	er or trustee

Firm's name Firm's address 02/12/2020

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1	May	the	IRS	disc	uss	this	retu
ł	with	the	prep	are <u>r</u>	sh	own .	<u>belo</u> v
	See II	nstruc	tions			Yes	

/ICE	PRESIDENT,	COMMERCE	TRUST	COMPANY	<u>A</u>	DIVISION	OF	1	BA	NK	-
	Print/Type preparer's	name	Pr	eparer's signatu	е			Date		Check	Ĺ

raiu
Preparer
Use Only

		self-employed
	Firm's	EIN ►

Phone no Form **990-PF** (2018) FORM 990PF, PART VII-A, LINE 14 - BOOKS ARE IN THE CARE OF

NAME: MARCIA UBBEN

COMMERCE TRUST COMPA

ADDRESS: PO BOX 419248

KANSAS CITY, MO 64141

TELEPHONE NUMBER: (816)234-2346

SIMONSON FAMILY CHARITABLE FOUNDATION 37-6560385 FORM 990PF, PART XV, LINE 3a - CONTRIBUTIONS, GIFTS, GRANTS PAID

RECIPIENT NAME:

AMERICAN INDIAN COLLEGE FUND

ADDRESS:

8333 GREENWOOD BLVD

DENVER, CO 80221

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

USED AT DISCRETION OF BOARD OF DIRECTORS

FOUNDATION STATUS OF RECIPIENT:

PC

RECIPIENT NAME:

ANIMAL LEGAL DEFENSE FUND

ADDRESS:

525 EAST COTATI AVE

COTATI, CA 94931

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

USED AT DISCRETION OF BOARD OF DIRECTORS

FOUNDATION STATUS OF RECIPIENT:

PC

RECIPIENT NAME:

ANTHOLOGY FILM ARCHIVE

ADDRESS:

32 2ND AVE

NEW YORK, NY 10003

RELATIONSHIP:

· NONE

PURPOSE OF GRANT:

USED AT DISCRETION OF BOARD OF DIRECTORS

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 2,000.

STATEMENT

KANSAS CITY, MO 64109 RELATIONSHIP:

NONE

ADDRESS:

PURPOSE OF GRANT:

2708 TRACY AVENUE

RECIPIENT NAME:

USED AT DISCRETION OF BOARD OF DIRECTORS

FOUNDATION STATUS OF RECIPIENT:

CHAIN OF HOPE KANSAS CITY

PC

CHILDRENS MERCY HOSPITAL

ADDRESS:

2401 GILLHAM ROAD

KANSAS CITY, MO 64108

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

USED AT DISCRETION OF BOARD OF DIRECTORS

FOUNDATION STATUS OF RECIPIENT:

 \mathtt{PC}

RECIPIENT NAME:

CUCHARA FOUNDATION

ADDRESS:

137 CUCHARA AVENUE EAST

CUCHARA, CO 81055

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

USED AT DISCRETION OF BOARD OF DIRECTORS

FOUNDATION STATUS OF RECIPIENT:

PC

RECIPIENT NAME:

ENVIRONMENTAL DEFENSE FUND INC

ADDRESS:

257 PARK AVENUE SOUTH

NEW YORK, NY 10010

RELATIONSHIP:

NONE-----

PURPOSE OF GRANT:

USED AT DISCRETION OF BOARD OF DIRECTORS

FOUNDATION STATUS OF RECIPIENT:

PC

EQUAL JUSTICE INITIATIVE

ADDRESS:

122 COMMERCE STREET MONTGOMERY, AL 36104

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

USED AT DISCRETION OF BOARD OF DIRECTORS

FOUNDATION STATUS OF RECIPIENT:

PC

RECIPIENT NAME:

GRAND BAHAMA DISASTER RELIEF FUND

COASTAL COMMUNITY FOUNDATION OF SC, INC

ADDRESS:

1691 TURNBULL AVENUE

NORTH CHARLESTON, SC 29405

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

USED AT DISCRETION OF BOARD OF DIRECTORS

FOUNDATION STATUS OF RECIPIENT:

PC

RECIPIENT NAME:

GREEN WORKS IN KANSAS CITY

ADDRESS:

607 E 31ST STREET

KANSAS CITY, MO 64109

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

USED AT DISCRETION OF BOARD OF DIRECTORS

FOUNDATION STATUS OF RECIPIENT:

PC

HUMAN RIGHTS INITIATIVE OF NORTH TEXAS

ADDRESS:

2801 SWISS AVENUE

DALLAS, TX 75204

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

USED AT DISCRETION OF BOARD OF DIRECTORS

FOUNDATION STATUS OF RECIPIENT:

PC

RECIPIENT NAME:

INSULIN FOR LIFE USA, INC.

ADDRESS:

5745 SW 75TH STREET, #116

GAINESVILLE, FL 32608

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

USED AT DISCRETION OF BOARD OF DIRECTORS

FOUNDATION STATUS OF RECIPIENT:

PC

RECIPIENT NAME:

JUVENILE DIABETES RESEARCH FOUNDATION

ADDRESS:

215 W PERSHING ROAD #300

KANSAS CITY, MO 64108

RELATIONSHIP:

NONE ·

PURPOSE OF GRANT:

USED AT DISCRETION OF BOARD OF DIRECTORS

FOUNDATION STATUS OF RECIPIENT:

PC

SIMONSON FAMILY CHARITABLE FOUNDATION 37-6560385 FORM 990PF, PART XV, LINE 3a - CONTRIBUTIONS, GIFTS, GRANTS PAID

RECIPIENT NAME:

KANSAS CITY CARE CLINIC

ADDRESS:

3039 TROOST AVENUE KANSAS CITY, MO 64109

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

USED AT DISCRETION OF BOARD OF DIRECTORS

FOUNDATION STATUS OF RECIPIENT:

PC

RECIPIENT NAME:

KANSAS CITY PUBLIC LIBRARY

ADDRESS:

14 WEST 10TH STREET

KANSAS CITY, MO 64105

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

USED AT DISCRETION OF BOARD OF DIRECTORS

FOUNDATION STATUS OF RECIPIENT:

PC

RECIPIENT NAME:

KANSAS FOOD BANK

ADDRESS:

1919 E DOUGLAS

WICHITA, KS 67211

RELATIONSHIP:

NONE -

PURPOSE OF GRANT:

USED AT DISCRETION OF BOARD OF DIRECTORS

FOUNDATION STATUS OF RECIPIENT:

PC

SIMONSON FAMILY CHARITABLE FOUNDATION 37-6560385 FORM 990PF, PART XV, LINE 3a - CONTRIBUTIONS, GIFTS, GRANTS PAID ______ RECIPIENT NAME: MOCSA ADDRESS: 3100 BROADWAY ST, #400 KANSAS CITY, MO 64111 RELATIONSHIP: NONE PURPOSE OF GRANT: USED AT DISCRETION OF BOARD OF DIRECTORS FOUNDATION STATUS OF RECIPIENT: RECIPIENT NAME: N+1 FOUNDATION ADDRESS: 68 JAY STREET, #405 BROOKLYN, NY 11201 RELATIONSHIP: NONE PURPOSE OF GRANT: USED AT DISCRETION OF BOARD OF DIRECTORS FOUNDATION STATUS OF RECIPIENT: PC AMOUNT OF GRANT PAID 2,000. RECIPIENT NAME: NATION IMMIGRATION LAW CENTER ADDRESS: 3450 WILSHIRE BLVD, #108-62 LOS ANGELES, CA 90010 RELATIONSHIP:

· NONE-

PURPOSE OF GRANT:

USED AT DISCRETION OF BOARD OF DIRECTORS

FOUNDATION STATUS OF RECIPIENT:

PC

AMOUNT OF GRANT PAID 5,000.

37-6560385 SIMONSON FAMILY CHARITABLE FOUNDATION FORM 990PF, PART XV, LINE 3a - CONTRIBUTIONS, GIFTS, GRANTS PAID RECIPIENT NAME: NEWHOUSE WOMEN'S SHELTER & RESIDENCE ADDRESS: PO BOX 240019 KANSAS CITY, MO 64124 RELATIONSHIP: NONE PURPOSE OF GRANT: USED AT DISCRETION OF BOARD OF DIRECTORS FOUNDATION STATUS OF RECIPIENT: PC

RECIPIENT NAME:
OPERATION BREAKTHROUGH
ADDRESS:
3039 TROOST AVENUE
KANSAS CITY, MO 64109
RELATIONSHIP:
NONE
PURPOSE OF GRANT:

USED AT DISCRETION OF BOARD OF DIRECTORS

FOUNDATION STATUS OF RECIPIENT: PC

RECIPIENT NAME:
PARTNERS IN HEALTH
ADDRESS:
800 BOYLSTON STREET, #300
BOSTON, MA 02199
RELATIONSHIP:
NONE

PURPOSE OF GRANT:
USED AT DISCRETION OF BOARD OF DIRECTORS

FOUNDATION STATUS OF RECIPIENT: PC

37-6560385 SIMONSON FAMILY CHARITABLE FOUNDATION FORM 990PF, PART XV, LINE 3a - CONTRIBUTIONS, GIFTS, GRANTS PAID _______ RECIPIENT NAME: PLANNED PARENTHOOD FEDERATION ADDRESS: PO BOX 97166 WASHINGTON, DC 20090 **RELATIONSHIP:** NONE PURPOSE OF GRANT: USED AT DISCRETION OF BOARD OF DIRECTORS FOUNDATION STATUS OF RECIPIENT: RECIPIENT NAME: RAICES ADDRESS: 1305 N FLORES STREET SAN ANTONIO, TX 78212 RELATIONSHIP: NONE PURPOSE OF GRANT: USED AT DISCRETION OF BOARD OF DIRECTORS FOUNDATION STATUS OF RECIPIENT: PC 3,000. AMOUNT OF GRANT PAID RECIPIENT NAME: ROCKY MOUNTAIN FELINE RESCUE ADDRESS: 2390 S DELAWARE STREET DENVER, CO 80223 RELATIONSHIP: NONE PURPOSE OF GRANT:

PC

USED AT DISCRETION OF BOARD OF DIRECTORS

AMOUNT OF GRANT PAID

FOUNDATION STATUS OF RECIPIENT:

1,500.

SAN LUIS VALLEY IMMIGRANT RESOURCE CTR

ADDRESS:

225 6TH ST, STE B ALAMOSA, CO 81101

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

USED AT DISCRETION OF BOARD OF DIRECTORS

FOUNDATION STATUS OF RECIPIENT:

PC

RECIPIENT NAME:

SCREEN SLATE INC

ADDRESS:

684 DEAN STREET, STE 1

BROOKLYN, NY 11238

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

USED AT DISCRETION OF BOARD OF DIRECTORS

FOUNDATION STATUS OF RECIPIENT:

PC

RECIPIENT NAME:

SHELDON CALVARY CAMP

ADDRESS:

4411 LAKE ROAD

CONNEAUT, OH 44030

RELATIONSHIP:

NONE

PURPOSE OF GRANT:

USED AT DISCRETION OF BOARD OF DIRECTORS

FOUNDATION STATUS OF RECIPIENT:

PC

37-6560385 SIMONSON FAMILY CHARITABLE FOUNDATION FORM 990PF, PART XV, LINE 3a - CONTRIBUTIONS, GIFTS, GRANTS PAID RECIPIENT NAME: THE CENTER FOR TRAUMA AND RESILIENCE ADDRESS: PO BOX 18975 DENVER, CO 80218 **RELATIONSHIP:** NONE PURPOSE OF GRANT: USED AT DISCRETION OF BOARD OF DIRECTORS FOUNDATION STATUS OF RECIPIENT: PC RECIPIENT NAME: THE FLORENCE IMMIGANT AND REFUGEE RIGHTS PROJECT INC ADDRESS: P.O. BOX 654 FLORENCE, AR 85132 RELATIONSHIP: NONE PURPOSE OF GRANT: USED AT DISCRETION OF BOARD OF DIRECTORS FOUNDATION STATUS OF RECIPIENT: RECIPIENT NAME: WAYSIDE WAIFS ADDRESS: 3901 MARTHA TRUMAN ROAD KANSAS CITY, MO 64137 RELATIONSHIP: NONE PURPOSE OF GRANT:

USED AT DISCRETION OF BOARD OF DIRECTORS

FOUNDATION STATUS OF RECIPIENT:

TOTAL GRANTS PAID:

103,500.

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FORM 990PF, PART XVII, LINE 2b - INFORMATION REGARDING TRANSFERS

NAME OF ORGANIZATION:
ALICE G OGG TRUST UNDER WILL
TYPE OF ORGANIZATION:
501(C)(4)
DESCRIPTION OF RELATIONSHIP:
COMMON TRUSTEE

NAME OF ORGANIZATION:
ANN A TRAVER CHARITABLE TRUST B
TYPE OF ORGANIZATION:
501(C)(4)
DESCRIPTION OF RELATIONSHIP:
COMMON TRUSTEE

NAME OF ORGANIZATION:
 IVY J TRIMMER - CHRISTIAN CHURCH
TYPE OF ORGANIZATION:
 501(C)(4)

DESCRIPTION OF RELATIONSHIP:
 COMMON TRUSTEE

NAME OF ORGANIZATION:
IVY J TRIMMER TRUST
TYPE OF ORGANIZATION:
501(C)(4)
DESCRIPTION OF RELATIONSHIP:
COMMON TRUSTEE

NAME OF ORGANIZATION:
MARY HARTMANN FOUNDATION
TYPE OF ORGANIZATION:
501(C)(4)
DESCRIPTION OF RELATIONSHIP:
COMMON TRUSTEE

NAME OF ORGANIZATION:
SHAARE SHOLEM CEMETERY TRUST
TYPE OF ORGANIZATION:
501(C)(13)
DESCRIPTION OF RELATIONSHIP:
COMMON TRUSTEE

FORM 990PF, PART XVII, LINE 2b - INFORMATION REGARDING TRANSFERS

NAME OF ORGANIZATION:
ADATH JOSEPH CEMETERY FUND
TYPE OF ORGANIZATION:
501(C)(13)
DESCRIPTION OF RELATIONSHIP:
COMMON TRUSTEE

NAME OF ORGANIZATION:
 NINA BOZARTH T/U/W FBO KAMPF CMTRY
TYPE OF ORGANIZATION:
 501(C)(13)

DESCRIPTION OF RELATIONSHIP:
 COMMON TRUSTEE



Simonson Family Charitable Fndn October 1, 2018 - September 30, 2019

Account Number: XX-XX59-01-7

List of Assets for the fact of the form	San the	4 5 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6	3-77	2	430 111	
Description	Shares	Cost/ Per Unit	Market Value/ Per Unit	Percent Of Assets	Projected Annual Income	Current Yield
Cash and Cash Equivalents				!		
Financial Square Tr Government Fd Admin Cl Fund 466	4,234.93	4,234.93	4,234.93	0.20%	75.00	1.78%
Income Cash		78,022,32	78,022.32	3.60%	0.00	0.00%
Principal Cash		-78,022.32	-78,022.32	-3.60%	0.00	0.00%
Total Cash and Cash Equivalents	_	\$ 4,234.93	\$ 4,234.93	0.20%	\$ 75.00	I.78%
Equity Investments						
Domestic Equities						
Common Stocks						
Facebook Inc-A	210	19,023.44	37,396.80 178.08	1.73%	00:00	0.00%
Kontoor Brands Inc	114	17.19 0.15	4,001 40	0.18%	255.00	6 38%
V F Corp	800	262.78 0.33	71,192.00	3.28%	1,376.00	1.93%
Total Common Stocks	•	\$ 19,303.41	\$ 112,590.20	5.19%	\$ 1,631.00	1.45%
Exchange Traded Funds						
iShares Russell Midcap Growth ETF	463	37,980 44 82.03	65,445.05	3.02%	395.00	0.60%
ıShares Russell Mıdcap Value ETF	948	61,004.75 64.35	85,035 60 89.70	3.92%	1,691.00	1.99%
Total Exchange Traded Funds		\$ 98,985.19	\$ 150,480.65	6.94%	\$ 2,086.00	1.39%
Mutuzi Funds						



Simonson Family Charitable Fndn October 1, 2018 - September 30, 2019

Account Number: XX-XX59-01-7

List of Assets # 24 mg 2 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1				-÷. ;	- 1-a	
Description	Shares	Cost/ Per Unit	Market Value/ Per Unit	Percent Of Assets	Projected Annual Income	Current Yield
Clearbridge Small Cap Growth Fund Is	1,132.674	32,691.68 28.86	42,894.36	1.98%	0.00	0.00%
Commerce Growth Fund Institutional Fund #337	2,383.131	.72,500.00 30.42	87,651.56	4.04%	533.00	0.61%
Commerce Value Fund Institutional Fund #346	, 1,747 604	55,000.00 31.47	54,542.72	2.52%	1,373.00	2.52%
DFA U S Small Cap Value Portfolio	1,450.31	51,085.63 35.22	46,699.98	2.15%	546.00	1.17%
DFA US Large Cap Value Portfolio	2,859.594	100,000.00	103,974.84	4.80%	2,164.00	2.08%
Hartford Mıdcap Fund-F	768 817	25,000.00 32.52	24,110.10	1.11%	00.0	0.00%
Schwab Fundamental US Large Company Index Fund Institutional Class	7,252 641	115,000.00	124,963 00 17.23	5.77%	3,009.00	2.41%
T Rowe Price Growth Stock Fund-I	1,563.882	97,500.00 62.35	106,343 98 68 00	4.91%	328.00	0 31%
T Rowe Price New Horizons Fund-I	583.10	27,790.30 47.66	35,592.42 61 04	1.64%	0.00	0.00%
TIAA-CREF Large-Cap Growth Index Fund	3,703.457	93,697.47 25.30	124,732.43	2.76%	1,451.00	1.16%
TIAA-CREF Large-Cap Value Index Fund	2,155.172	40,000.00 18.56	43,663.78	2.01%	1,058.00	2.42%
Vanguard US Growth Fund-Adm	801.441	74,337.61 92.76	84,167.33	3.88%	371.00	0 44%
Total Mutual Funds		\$ 784,602.69	\$ 879,336.50	40.57%	\$ 10,833.00	1.23%
Tota! Domestic Equities		\$ 902,891.29	\$ 1,142,407.35	52.71%	\$ 14,550.00	1.27%
International Equities	-					

Exchange Traded Funds



Simonson Family Charitable Fndn October 1, 2018 - September 30, 2019

Account Number: XX-XX59-01-7

List of Assets posts & the fact of the second	Samuel 1	o Poto		-	,	
l Description	Shares	Cost/ Per Unit	Market Value/ Per Unit	Percent Of Assets	Projected Annual Income	Current Yield
Vanguard Ftse All World Ex-US Small Cap ETF	190	19,339.97	19,370.50	0.89%	569.00	2.94%
Total Exchange Traded Funds	-	\$ 19,339.97	\$ 19,370.50	%68.0	\$ 569.00	2.94%
International Equity Mutual Funds						
Causeway Emerging Markets Fund Is	1,969.365	27,000 00	23,376.36	1.08%	452.00	1.94%
DFA Emerging Markets Portfolio,	675.044	17,500.00	17,888.67	0.83%	461.00	2.58%
DFA International Small Company Portfolio	2,591.065	47,000.00	45,239.99	2.09%	1,153.00	2.55%
DFA Large Cap International Portfolio	1,762.923	36,000.00 20.42	38,872.45	1.79%	1,195.00	3.07%
Invesco Developing Markets Fund-R6	883.692	28,415.94 32.16	31,353 39	1.45%	260.00	1.79%
Lazard Emerging Markets Equity Port Instl	1,121.688	17,902.14	18,956.53 16.90	0.87%	478.00	2.53%
MFS Research International Fund R6	4,070.116	70,538.50	74,320.32	3.43%	3,203.00	4.31%
T Rowe Price Overseas Stock Fund-I	6,084.071	55,000.00	63,335.18	2.92%	1,338.00	2.11%
TIAA-CREF Institutional International Equity Index Fund-I	2,269.684	42,500.00 18.73	43,373.66 19.11	2.00%	1,314.00	3.03%
Total International Equity Mutual Funds		\$ 341,856.58	\$ 356,716.55	16.46%	\$ 10,154.00	2.85%
Total International Equities		\$ 361,196.55	\$ 376,087.05	17.35%	\$ 10,723.00	2.85%
Total Equity Investments		\$ 1,264,087.84	\$ 1,518,494.40	70.06%	\$ 25,273.00	1.67%
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Simonson Family Charitable Fndn October 1, 2018 - September 30, 2019

Account Number: XX-XX59-01-7

Listford Assets, Escape of the second of the		66.86 86 86 86 86 86 86 86 86 86 86 86 86 8				
Description	Shares	Cost/ Per Unit	Market Value/ Per Unit	Percent Of Assets	Projected Annual Income	Current Yield
Fixed Income Investments				:		
Credit						
Vanguard Intermediate Term Investment Grade Fund Adm	, 10,953.595	108,714.45	110,193.17	2.08%	3,250.00	2.95%
Total Credit		\$ 108,714.45	\$ 110,193.17	2.08%	\$ 3,250.00	2.95%
Treasury Tips	•					
Shares Treasury Inflation Protected Securities Bond ETF	100	11,088.00	11,629.00	0.54%	224.00	1.93%
Total Treasury Tips		\$ 11,088.00	\$ 11,629.00	0.54%	\$ 224.00	1.93%
Diversified Taxable Mutual Funds						
Baird Aggregate Bond Fund-Is	5,734.691	60,572.29 10 56	64,572.62 11.26	2.98%	1,783.00	2.76%
Commerce Bond Fund Fund #333	13,023.738	262,613.54 20 16	266,335.44	12.29%	7,792.00	2.93%
-Dodge & Cox Income Fund	5,200.306	70,565.33	73,272.31	3.38%	2,303.00	3.14%
Total Diversified Taxable Mutual Funds		\$ 393,751.16	\$ 404,180.37	18.65%	\$ 11,878.00	2.94%
Taxable High Yield Funds						
Blackrock High Yield Portfolio - K	1,593.269	12,411.56 7.79	12,236.31	0.56%	662.00	5.41%
Fidelity Advisor Floating Rate High Income Fund - Z	775.48	7,482.87	7,343.80	0.34%	361.00	4.92%
Hartford Floating Rate Fund-F	1,144.387	10,014.13	9,635.74	0.44%	415.00	4.31%
Vanguard High Yield Corporate Fund Adm	2,529.512	15,000.00 5.93	14,898.83	%69.0	778 00	5.22%
Total Taxable High Yield Funds		\$ 44,908.56	\$ 44,114.68	2.04%	\$ 2,216.00	5.03%

Wealth | Investments | Planning

Simonson Family Charitable Fndn October 1, 2018 - September 30, 2019

Account Number: XX.XX59-01-7

PList of Assets a see the base of the second and th	2 6 6 6 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8	10 00 10 10 10 10 10 10 10 10 10 10 10 1				
Description	Shares	Cost/ Per Unit	Market Value/ Per Unit	Percent Of Assets	Projected Annual Income	Current Yield
Domestic Preferred Stock						
Cohen & Steers Preferred Securities & Income Fund F	1,231.902	17,500.00 14 21	17,320.54	0.80%	932.00	5.38%
Total Domestic Preferred Stock		\$ 17,500.00	\$ 17,320.54	0.80%	\$ 932.00	5.38%
Emerging Markets	•					
Fidelity New Markets Income Fund Z	; 680.253	10,684.94 15.71	10,054.14	0.46%	466.00	4.64%
Pimco Emerging Markets Local Currency and Bond Fund-Inst	747.579	7,064.62	5,143.34 6 88	0.24%	422.00	8.21%
Total Emerging Markets		\$ 17,749.56	\$ 15,197.48	0.70%	\$ 888.00	5.85%
Total Fixed Income Investments	•	\$ 593,711.73	\$ 602,635.24	27.80%	\$ 19,388.00	3.22%
Alternative Investments						
Hedge Funds	1					
Principal Global Multi-Strategy Fund	2,898.518	30,000.00 10.35	31,217.04	1.44%	495.00	1.59%
Robeco Boston Partners Long/Short Research Fund	694.71	9,899.62 14.25	10,781.90	0.50%	8.00	%80.0
Total Hedge Funds		\$ 39,899.62	\$ 41,998.94	1.94%	\$ 503.00	1.20%
Total Alternative Investments		\$ 39,899.62	\$ 41,998.94	1.94%	\$ 503.00	I.20%

\$ 45,239.00

100.00%

\$ 2,167,363.51