Form **990-PF**Department of the Treasury

EXTENDED TO AUGUST 17, 2020 Return of Private Foundation

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

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

▶ Do not enter social security numbers on this form as it may be made public.

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Form 990-PF (2018)

► Go to www.irs.gov/Form990PF for instructions and the latest information Internal Revenue Service OCT 1, 2018 30, 2019 For calendar year 2018 or tax year beginning and ending SEP Name of foundation A Employer identification number INDEPENDENT INSURANCE AGENTS ASSOCIATION OF GREATER OKLAHOMA CITY FOUNDATION, INC 73-6125907 Number and street (or P.O. box number if mail is not delivered to street address) B Telephone number P.O. BOX 18577 405-843-5678 Internal Révenue Se City or town, state or province, country, and ZIP or foreign postal code xemption application is pending, check here Received US Bank -USB OKLAHOMA CITY, OK 73154 736 Initial return of a former public charity Check all that apply: Initial return D 1. Foreign organizations, check here Final return Amended return 2. Foreign organizations meeting the 85% test, check here and attach computation Address change Name change H Check type of organization; X Section 501(c)(3) exempt private foundation If private foundation status was terminated Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation under section 507(b)(1)(A), check here I Fair market value of all assets at end of year J Accounting method: Cash Accrual If the foundation is in a 60-month termination X Other (specify) MODIFIED (from Part II, col. (c), line 16) under section 507(b)(1)(B), check here 294,628. (Part I, column (d) must be on cash basis. ▶\$ Part I Analysis of Revenue and Expenses (d) Disbursements (a) Revenue and (b) Net investment (c) Adjusted net (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a)) for charitable purposes (cash basis only) expenses per books income ıncome 🖈 😘 - Lou chillitheanna Contributions, gifts, grants, etc., received N/A Parke FEE Managada sa Check X if the foundation is not required to attach Sch 8 Communicación de Communicación Interest on savings and temporary cash investments 6,261 Dividends and interest from securities 6,261. STATEMENT 4 5a Gross rents SCANNED JAN 2 b Net rental income or (loss) -486a Net gain or (loss) from sale of assets not on line 10 b Gross sales price for all assets on line 6a 56,401. ··· arrive 0. Capital gain net income (from Part IV, line 2) Net short-term capital gain Income modifications 10a Cross sales less returns and allowances 1211196 Hilli b Less Cost of goods sold **∞** c Gross profit or (loss) 2022 11 Other income 6,213. 12 Total. Add lines 1 through 11 6.261. 0. 0 Compensation of officers, directors, trustees, etc. 14 Other employee salaries and wages 15 Pension plans, employee benefits 16a Legal fees **b** Accounting fees STMT 2 1.672. 1.672. 0. c Other professional fees 17 Interest 221 18 Taxes STMT 3 0. 0. 19 Depreciation and depletion 20 Occupancy 21 Travel, conferences, and meetings 22 Printing and publications STMT 4 1,000. 0. 0. 23 Other expenses 24 Total operating and administrative 2,893. 1,672. expenses Add lines 13 through 23 28,000. 28,000. 25 Contributions, gifts, grants paid 26 Total expenses and disbursements. 30,893. 1,672 28,000. Add lines 24 and 25 27 Subtract line 26 from line 12: -24,680. a Excess of revenue over expenses and disbursements 4,589 b Net investment income (if negative, enter -0-) N/A c Adjusted net income (if negative, enter -0-)

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Part II Balance Sheets and the state of the parameters of the state of the stat			Balance Sheets Attached schedules and amounts in the description	Beginning of year	End o	
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OF GREATER OKLAHOMA CITY FOUNDATION, INC Form 990-PF (2018)

73-6125907

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					 	_					
e					L.,			·			
(e) Gross sales price		preciation allowed or allowable)		st or other basis expense of sale					ain or (loss) s (f) minus ((g))	
<u>a</u> 56,401.				56,44	9.						<u>-48.</u>
b c											
d											
e											
Complete only for assets showing		· · · · · · · · · · · · · · · · · · ·					() col) Gains (C . (k), but i	Col. (h) gain not less than	minus 1 -0-) or	
(i) FMV as of 12/31/69		Adjusted basis s of 12/31/69		cess of col. (1) col. (j), if any					(from col (l		
a											-48.
<u>b</u>											
<u>c</u>											
d e										 	
		∫ If gain, also enter	ın Part I, line	7	٦					•	
2 Capital gain net income or (net ca	pital loss)	$\left\{\begin{array}{l} \text{If gain, also enter} \\ \text{If (loss), enter -0-} \end{array}\right.$	ın Part İ, lıne	? 7		2	ļ			 .	<u>-48.</u>
3 Net short-term capital gain or (los	,	d in sections 1222(5) and	d (6):		٦						
If gain, also enter in Part I, line 8, If (loss), enter -0- in Part I, line 8	column (c)				<u>}</u>	3			N/A	•	
		ction 4940(e) for l					ent Inco	me			
(For optional use by domestic private	foundations	subject to the section 49	940(a) tax on	net investment in	come)					
If section 4940(d)(2) applies, leave th	ns part blank										
Was the foundation liable for the sect	tion 4942 tax	on the distributable amo	ount of any ye	ear in the base per	10d?					Yes [X No
If "Yes," the foundation doesn't qualif											
1 Enter the appropriate amount in 6	each column		structions bei	fore making any ei				1		(d)	
Base periód years Calendar year (or tax year beginnir	ng in)	(b) Adjusted qualifying dist	ributions	Net value of no	(c) nchar		use assets		Distrib	ùtion ratio ided by col. (c	:))
2017			5,000.				2,633		((-)	.10	8482
2016		4.	3,000.	<u>-</u>		32	1,994	<u>•</u>		.13	<u>3543</u>
2015 2014											
2013											
				-							
2 Total of line 1, column (d)		=						2		.24	<u> 2025</u>
3 Average distribution ratio for the t	-		n line 2 by 5.	0, or by the numb	er of y	ears		,		12	1013
the foundation has been in exister	ice ii iess iiiz	in 5 years						3		• 1 2 .	<u> </u>
4 Enter the net value of noncharitab	le-use assets	s for 2018 from Part X, II	ne 5					4		295,	397.
										25.	
5 Multiply line 4 by line 3								5		35,	747.
6 Enter 1% of net investment incom	e (1% of Par	t I, line 27b)						6			46.
	,	,									
7 Add lines 5 and 6								7		35,	793.
8 Enter qualifying distributions from	Part XII, lin	e 4						8		28,	000.
If line 8 is equal to or greater than	line 7, checl	k the box in Part VI, line	1b, and comp	lete that part usin	g a 19	% tax ra	ate.		-		
See the Part VI instructions.											

INDEPENDENT INSURANCE AGENTS ASSOCIATION OF GREATER OKLAHOMA CITY FOUNDATION. 73-6125907 Form 990-PF (2018) Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions) Part VI 1a Exempt operating foundations described in section 4940(d)(2), check here \(\bigs \) and enter "N/A" on line 1. ___ (attach copy of letter if necessary-see instructions) Date of ruling or determination letter: 92. 1 of Part I, line 27b c. All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b) 2 0. 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) 92. 3 0. 4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-) 92 5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-5 6 Credits/Payments: a 2018 estimated tax payments and 2017 overpayment credited to 2018 бя 0. b Exempt foreign organizations - tax withheld at source 6b 0. c Tax paid with application for extension of time to file (Form 8868) 60 d Backup withholding erroneously withheld 6d 0. 7 7 Total credits and payments. Add lines 6a through 6d 0. Enter any penalty for underpayment of estimated tax. Check here _____ if Form 2220 is attached 8 92. 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 11 Enter the amount of line 10 to be: Credited to 2019 estimated tax Refunded > 11 Part VII-A Statements Regarding Activities Yes No 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in X any political campaign? 1a X 1b b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities. X c Did the foundation file Form 1120-POL for this year? 1c 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. ► \$ e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. > \$ 2 X 2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities. 3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or 3 bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? 4a N/A b If "Yes," has it filed a tax return on Form 990-T for this year? 4b X 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? 5 If "Yes," attach the statement required by General Instruction T 6 Are the requirements of section 508(e) (relating to sections 1941 through 1945) 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 X remain in the governing instrument? X 7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV 7 8a Enter the states to which the foundation reports or with which it is registered. See instructions. OK b If the ancwer is "Yes" to line 7, has the foundation furnished a copy of Form 990 PF to the Attorney General (or designate) X of each state as required by General Instruction Go If "No," attach explanation 8b 9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar

year 2018 or the tax year beginning in 2018? See the instructions for Part XIV. If "Yes," complete Part XIV

10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses

Form 990-PF (2018)

10

Form 990-PF (2018) OF GREATER OKLAHOMA CITY FOUNDATION, INC

73-6125907

Pa	art VII-A Statements Regarding Activities (continued)			
	•		Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of			
	section 512(b)(13)? If "Yes," attach schedule See instructions	11		<u>X</u>
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges?			
	If "Yes," attach statement. See instructions	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
	Website address ► N/A The books are in care of ► MARK CARLIN Telephone no. ► 405-84	2 5	670	
14	The books are in care of ► MARK CARLIN Located at ► PO BOX 18577, OKLAHOMA CITY, OK ZIP+4 ► 73		0/0	
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here	<u> </u>	$\overline{}$	$\overline{\Box}$
10	and enter the amount of tax-exempt interest received or accrued during the year	N	/A	
16			Yes	No
	securities, or other financial account in a foreign country?	16		х
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the			
	foreign country			
Pa	art VII-B Statements Regarding Activities for Which Form 4720 May Be Required			
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		Yes	No
1a	a 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?			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)			
	a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? X Yes No]
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (X) Yes No			1
	(4) Pay compensation to, or pay or reinfluorse the expenses of, a disqualified person? (5) Transfer any income or assets to a disqualified person (or make any of either available			l
	for the benefit or use of a disqualified person)?			ŀ
	(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.)			
b	o If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations			$oldsymbol{ol}}}}}}}}}}}}}}}}}}$
	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			1
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			لـــا
	before the first day of the tax year beginning in 2018?	1c		<u> </u>
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)):			
а	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?			
	If "Yes," list the years ,,,			
þ	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect			1
	valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) N/A			
_	statement - see instructions.) If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.	2b		
C	the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.			Ì
32	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time			
•	during the year?			
b	of If "Yes," did it have excess business holdings in 2018 as a result of (1) any purchase by the foundation or disqualified persons after			
	May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose			
	of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C,			
	Form 4720, to determine if the foundation had excess business holdings in 2018.) N/A	3b		
	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		<u> X</u>
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?	<u> 4b </u> m 99 0	DE	<u>X</u>
	F01	111 フラリ	,	(ZU IÖ)

Tart III D Claterile its riegarding / total its resident	om med way born	CONUIT	uea)			
5a During the year, did the foundation pay or incur any amount to:			L	Y	es	No
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	1015(0))?	Y	oc X No			
(2) Influence the outcome of any specific public election (see section 4955); or	to carry on, directly or indire					
any voter registration drive?			es X No		ľ	
(3) Provide a grant to an individual for travel, study, or other similar purposes?	?	X Y	es L No	""	}	'
(4) Provide a grant to an organization other than a charitable, etc., organization	i described in section		L.	Philippine pro-	t hudded ()	to lobblidan
4945(d)(4)(A)? See instructions		Y	es X No		1	
(5) Provide for any purpose other than religious, charitable, scientific, literary,	or educational purposes, or f				1	
the prevention of cruelty to children or animals?			es X No		ŀ	
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify unc		n Regulations	<u> -</u>			to tild taled
section 53.4945 or in a current notice regarding disaster assistance? See instru				5b		X
Organizations relying on a current notice regarding disaster assistance, check h			┍┖			
c. If the answer is "Yes" to question 5a(4), does the foundation claim exemption for		. —	<u>_</u>	""		,
expenditure responsibility for the grant?	D.	I/A Y	es L No		1	
If "Yes," attach the statement required by Regulations section 53 4945-5(d).						
Ga Did the foundation, during the year, receive any funds, directly or indirectly, to p	pay premiums on			ranhaar	1	didiamini ana
a personal benefit contract?		Ye	es 🛣 No 📙			37
h Did the foundation, during the year, pay premiums, directly or indirectly, on a pi	ersonal henefit contract?		<u> </u>	UP		X
If "Yes" to 6b, file Form 8870.		<u></u>	[32]			
7a At any time during the tax year, was the foundation a party to a prohibited tax sl		Ye	es X No		daer tob	0115-55
h If "Yes." did the foundation receive any proceeds or have any net income attribut			N/A	7b	\dashv	
8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$	1,000,000 in remuneration or		(TZ)			
excess parachute payment(s) during the year? Part VIII Information About Officers, Directors, Truste	C		es X No		l	[]]
Paid Employees, and Contractors	· · · · · · · · · · · · · · · · · · ·	nagers, mignly				
1 List all officers, directors, trustees, and foundation managers and th	<u>-</u>	1	1 (-1) -			
(a) Name and address	(b) Title, and average hours per week devoted	(c) Compensation (If not paid,	(d) Contributions to employee benefit plans and deferred	(e)) Expe ount.	ense other
(a) Name and address	to position	enter -0-)	compensation	al	Iowar	ices
						_
SEE STATEMENT 7		0.	0.	┼		0.
		ļ		—		
				┼		
2 Compensation of five highest-paid employees (other than those incl	uded on line 1) If none	nter "NONE "	<u></u>	<u> </u>		
a compensation of the highest-paid employees (other than those incl	(b) Title, and average	INCH HONE.	(d) Contributions to	(6)) Exn	ense
(a) Name and address of each employee paid more than \$50,000	hours per week devoted to position	(c) Compensation	employee benefit plans and deterred	acc	ount,	ense other
NONE	devoted to position		compensation	- all	lowan	ices
HONE						
				 		
		+		+-		
	,,	<u> </u>		+-		
				+-		
Total number of other employees hald over \$50,000	<u> </u>	1	<u> </u>	Ь		0
Total number of other employees paid over \$50,000						

Form 990-PF (2018) OF GREATER OKLAHOMA CITY FOUNDATION		6125907 Page 7
Part VIII Information About Officers, Directors, Trustees, Foundation Paid Employees, and Contractors (continued)	n Managers, Highly	
3 Five highest-paid independent contractors for professional services. If none, enter "N	IONE."	
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
		· -
Total number of others receiving over \$50,000 for professional services Part IX-A Summary of Direct Charitable Activities	•	▶ 0
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical		
number of organizations and other beneficiaries served, conferences convened, research papers product	ed, etc.	Expenses
1 N/A		
		1
2		
3		
		•
4		
Part IX-B Summary of Program-Related Investments		
Describe the two largest program-related investments made by the foundation during the tax year on line	es 1 and 2.	Amount
1 N/A		
2		
All other program-related investments. See instructions.		
3	!	
Total. Add lines 1 through 3		0.
1 ottan / too miles 1 timoogra		Form 990-PF (2018)

73-6125907 Form 990-PF (2018) Page 8 Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.) Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: 1 268,313. a Average monthly fair market value of securities 1a 31,582. b Average of monthly cash balances 1b c Fair market value of all other assets 1c 299,895. d Total (add lines 1a, b, and c) 1d e Reduction claimed for blockage or other factors reported on lines 1a and 0. 1c (attach detailed explanation) Acquisition indebtedness applicable to line 1 assets 2 299,895. Subtract line 2 from line 1d 3 3 4.498 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) 4 295,397 5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 5 Minimum investment return. Enter 5% of line 5 Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations, check here \blacktriangleright and do not complete this part) 14,770. Minimum investment return from Part X, line 6 92. Tax on investment income for 2018 from Part VI, line 5 Income tax for 2018. (This does not include the tax from Part VI.) c Add lines 2a and 2b 2c 14,678 3 Distributable amount before adjustments. Subtract line 2c from line 1 3 Recoveries of amounts treated as qualifying distributions 4 5 Add lines 3 and 4 5 Deduction from distributable amount (see instructions) 6 6 14,678 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 7 Part XII Qualifying Distributions (see instructions) Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes: 1 Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26 28,000. 1a b Program-related investments - total from Part IX-B 1b Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes 2 Amounts set aside for specific charitable projects that satisfy the: 3 Suitability test (prior IRS approval required) 3a **b** Cash distribution test (attach the required schedule) 3b 28,000. Qualifying distributions Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4 4 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b 5 Adjusted qualifying distributions. Subtract line 5 from line 4 28,000. 6

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

Form **990-PF** (2018)

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				<u>14</u> ,678.
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only			0.	
b Total for prior years:				
		0.		
3 Excess distributions carryover, if any, to 2018:				
a From 2013				
b From 2014				
c From 2015				
d From 2016 27, 269.		-		
e From 2017 19,089.	46 250	i .		
f Total of lines 3a through e	46,358.	•		
4 Qualifying distributions for 2018 from				
Part XII, line 4: ► \$ 28,000.			•	
a Applied to 2017, but not more than line 2a		"	0.	
b Applied to undistributed income of prior		0	,	
years (Election required - see instructions)		0.		
a Treated as distributions out of corpus	0	· '		
(Election required - see instructions)	0.			14,678.
d Applied to 2018 distributable amount	12 222			14,0/0.
e Remaining amount distributed out of corpus	13,322.			0.
Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	59,680.			
b Prior years' undistributed income. Subtract				
line 4b from line 2b		0.		
c Enter the amount of prior years'				
undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable			· · · · · · · · · · · · · · · · · · ·	
amount - see instructions		0.		
e Undistributed income for 2017. Subtract line				
4a from line 2a Taxable amount - see instr.			0.	
f Undistributed income for 2018. Subtract	***			
lines 4d and 5 from line 1. This amount must				
be distributed in 2019				0.
7 Amounts treated as distributions out of				ı
eorpus to satisfy requirements imposed by			1 1	
section 170(b)(1)(F) or 4942(g)(3) (Election				
may be required - see instructions)				
8 Excess distributions carryover from 2013	_	Na HIII I		,
not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2019.	FA 444			
Subtract lines 7 and 8 from line 6a	59,680.			
10 Analysis of line 9:				
a Excess from 2014				
b Excess from 2015				
c Excess from 2016 27, 269.				
d Excess from 2017 19,089.			1.1.1	•
e Excess from 2018 13,322.				<u> </u>

INDEPENDENT INSURANCE AGENTS ASSOCIATION OF GREATER OKLAHOMA CITY FOUNDATION, INC

73-6125907

Form 990-PF (2018) OF GREA [Part:XIV Private Operating Form Privat	TER OKLAHOM				.25907 Page 10
<u></u>				N/A	
1 a If the foundation has received a ruling of		• • •			
foundation, and the ruling is effective for b Check box to indicate whether the found	•	-	un acetion	4942(j)(3) or4	942(j)(5)
	Tax year	ig fourtoation described	Prior 3 years	1 4342(])(3) 01 [] 4	1
2 a Enter the lesser of the adjusted net	(a) 2018	(b) 2017	(c) 2016	(d) 2015	(e) Total
income from Part I or the minimum	(a) 2010	(0) 20 11	(6) 2010	(0) 20.0	(0, 10.2.
investment return from Part X for					
each year listed				 	
b 85% of line 2a				 	
c Qualifying distributions from Part XII,					
line 4 for each year listed				 	
d Amounts included in line 2c not				1	
used directly for active conduct of exempt activities					
e Qualifying distributions made directly				1	
for active conduct of exempt activities.					
Subtract line 2d from line 2c			1		
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(i)(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				1	
investment income (interest,					
dividends, rents, payments on					
securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public				<u> </u>	
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 Info	rmation (Comple	te this part only	if the foundation	had \$5,000 or mo	re in assets
at any time during t	he year-see instr	uctions.)			
1 Information Regarding Foundation	n Managers:				
a List any managers of the foundation wh		than 2% of the total con	tributions received by the	foundation before the clo	se of any tax
year (but only if they have contributed n			·		·
NONE					
b List any managers of the foundation who other entity) of which the foundation ha			(or an equally large porti	on of the ownership of a p	artnership or
NONE	v				
2 Information Regarding Contributi	ion Grant Gift Loan	Scholarship etc. P	rograms.		
Check here ► if the foundation of		• • • •	•	not accept unsolicited regi	jects for funds. If
the foundation makes gifts, grants, etc.,	•	•	•		10313 101 101103. 11
a The name, address, and telephone num					
COR CONTRACTO 0					
SEE STATEMENT 8 b The form in which applications should b	ne submitted and information	tion and materials they s	should include;		
					<u></u>
c Any submission deadlines:					
d Any restrictions or limitations on award	s, such as by goographic	ıl areas, charitable fields	s, kinds of institutions, or	other factors:	

Form 990-PF (2018) OF GREATER OKLAHOMA CITY FOUNDATION, INC

Part XV Supplementary Information (continued)

73-6125907

3 Grants and Contributions Paid During the	Year or Approved for Future	Payment		
Recipient	If recipient is an individual, show any relationship to	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	any foundation manager or substantial contributor	recipient		
Paid during the year				
ABBEY RENNER	NONE	þ	SCHOLARSHIP FOR HIGHER	
2805 N KENTUCKY AVE. APT B			EDUCATION .	
OKLAHOMA CITY, OK 73106		-		1,000.
ASHTYN BRADLEY	NONE	ļī.	SCHOLARSHIP FOR HIGHER	
516 S. CHARDON DR.			EDUCATION	
MUSTANG, OK 73064				2,000.
AUSTIN BULLOCK	NONE	þ	SCHOLARSHIP FOR HIGHER	
921 DERBY DR.			EDUCATION	•
MIDWEST CITY, OK 73130		-		2,000.
BAILEY CHADDRICK	NONE	ļr	SCHOLARSHIP FOR HIGHER	
1806 C R 1210			EDUCATION	
TUTTLE, OK 73089				2,000.
CARDIN HART	NONE	T T	SCHOLARSHIP FOR HIGHER	
17501 WOODSORREL RD.			EDUCATION	
EDMOND, OK 73012				1,000.
Total SEE CO	NTINUATION SHEE	T(S)	. ► 3a	28,000.
b Approved for future payment				
NONE				
			-	
Total			▶ 3b	0.

73-6125907

Part XV Supplementary Informat 3 Grants and Contributions Paid During the				
Recipient	If recipient is an individual,	T		
Name and address (home or business)	show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
	UI Substantial Contributor	, corprene		
CHRISTOPHER SHIRAZI	NONE	I	SCHOLARSHIP FOR HIGHER	
7725 NW 116TH ST.			EDUCATION	
OKLAHOMA CITY, OK 73162		 		1,000
COURTNEY MILES	NONE		SCHOLARSHIP FOR HIGHER	
6701 N. ANN ARBOR TERR.			EDUCATION	
OKLAHOMA CITY, OK 73132				1,00
DAREN REED	NONE	Ī	SCHOLARSHIP FOR HIGHER	
8448 S.W. 92ND CIR.			EDUCATION	2,000
OKLAHOMA CITY, OK 73169				2,000
EMILY HOLMES	NONE	Ī	SCHOLARSHIP FOR HIGHER	
3120 W. FAIRFIELD AVE.			EDUCATION	
OKLAHOMA CITY, OK 73116				500
JACOB ANKNEY	NONE	ī	SCHOLARSHIP FOR HIGHER	
5605 N. POTT RD.	10112		EDUCATION	
HARRAH, OK 73045				1,00
JEFF MILES	NONE	μ 	SCHOLARSHIP FOR HIGHER EDUCATION	
6701 N. ANN ARBOR TERR. OKLAHOMA CITY, OK 73132			EDUCATION	2,00
oktomotor diri, ok ydroz				
JUSTIN WESTOVER	NONE	Ī	SCHOLARSHIP FOR HIGHER	
5820 N.W. 54TH ST.			EDUCATION	
WARR ACRES, OK 73122				2,00
KATERI KRUG	NONE	Ī	SCHOLARSHIP FOR HIGHER	
10680 CANYON CREST DR.			EDUCATION	
EDMOND, OK 73025				1,00
KATHRYN FULTON	NONE	.	SCHOLARSHIP FOR HIGHER	
4701 CLIPPER CROSSING	NONE	ŗ	EDUCATION	
EDMOND, OK 73013				1,00
LAURA FREDRICKSON	NONE	F	SCHOLARSHIP FOR HIGHER	
12101 E. COFFEE CREEK			EDUCATION	1 00
ARCADIA, OK 73007 Total from continuation sheets			<u> </u>	1,00 20,00

OF GREATER OKLAHOMA CITY FOUNDATION, INC 73-6125907 Part XV Supplementary Information Grants and Contributions Paid During the Year (Continuation) If recipient is an individual, Recipient Foundation Purpose of grant or show any relationship to Amount contribution status of any foundation manager Name and address (home or business) recipient or substantial contributor NONE SCHOLARSHIP FOR HIGHER REAGAN WHITLOCK 15025 S.E. 119TH EDUCATION NEWALLA, OK 74857 2,000. SOLANA CEVILLE NONE SCHOLARSHIP FOR HIGHER 2617 S.E. 94 CIRCLE EDUCATION OKLAHOMA CITY, OK 73160 1,000. TOBIE MITCHELL NONE SCHOLARSHIP FOR HIGHER EDUCATION P.O. BOX 60933 OKLAHOMA CITY, OK 73146 2,000. SCHOLARSHIP FOR HIGHER DALTON WESTOVER NONE 5820 N.W. 54TH ST. EDUCATION OKLAHOMA CITY, OK 73122 500. HANNAH TORRES NONE SCOLARSHIP FOR HIGHER EDUCATION 12116 SKYWAY AVE 500. OKLAHOMA CITY, OK 73162 AVA REBER NONE SCHOLARSHIP FOR HIGHER EDUCATION 11009 TAMMY TERRACE NEWALLA, OK 74857 500. SCHOLARSHIP FOR HIGHER JAMES KINNEY NONE EDUCATION 8104 BREEZEWOOD DR. OKLAHOMA CITY, OK 73135 500. TARYN MCLAUGHLIN NONE SCHOLARSHIP FOR HIGHER EDUCATION 6700 84TH AVE NE 500. NORMAN, OK 73026

Total from continuation sheets

Form 990-PF (2018)

Part XVI-A Analysis of Income-Producing Activities

1 Program service revenue: a b c d e f f function income Business code Amount Amount Amount Amount Amount Felated or exempt function income Business code Amount Amount Function income Business code Amount Function income Code Amount Function income Code Amount Function income Code Amount Function income Code Amount Function income Function income Code Amount Function income Function income Code Amount Function income						
a b c d e f g Fees and contracts from government agencies 2 Membership dues and assessments 3 Interest on savings and temporary cash investments 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 10 Cforss profit or (loss) from special events 10 Gross profit or (loss) from sales of inventory 11 Other revenue a b c d e e 12 Subtotal. Add columns (b), (d), and (e) 13 Total. Add line 12, columns (b), (d), and (e) 15 Total. Add line 12, columns (b), (d), and (e) 16 See worksheet in line 13 instructions to verify calculations) Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes Line No Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of	Enter gross amounts unless otherwise indicated.	(a)	(b)	(C) Exclu- sion	(d)	Related or exempt
b c d d d d d d d d d d d d d d d d d d	1 Program service revenue:		Amount	code	Amount	Tunction income
c d e f 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 Deht-financed property 5 Not debt-financed property 6 Net rental income or (loss) from personal property 7 Other investment income 8 Gain or (loss) from sales of assets other than inventory 1 8 Met income or (loss) from special events 10 Gross profit or (loss) from sales of inventory 1 10 Other revenue a b c c d e e e 12 Subtotal. Add columns (b), (d), and (e) 13 Total. Add line 12, columns (b), (d), and (e) 15 Total. Add line 12, columns (b), (d), and (e) 15 Total. Add line 12, columns (b), (d), and (e) 16 Cee worksheet in line 13 instructions to verify calculations 15 Total. Add line 12, columns (b) (d), and (e) 5 Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of	a					
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11 Other revenue: a	9 Net income or (loss) from special events					
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b c d d d d d d d d d d d d d d d d d d	11 Other revenue					
b c d d d d d d d d d d d d d d d d d d	a					
c d e lationship 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						
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Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes Line No Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of						
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			.:			<u> </u>
	Part AVI-B Relationship of Activities	to the Accomp	disnment of Exe	empt Pt	urposes	
	Line No Explain below how each activity for which inc	ome is renorted in co	lumn (e) of Part XVI-A	contribute	d importantly to the accomp	lishment of
				00111110010	a importantly to the accomp	manificate of
		<u> </u>	,			
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						·
						

Form 990-PF (2018)

OF GREATER OKLAHOMA CITY FOUNDATION, INC.

73-6125907

Page 13

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

1	Did the o	rganization directly or indir	ectly engage in any o	of the followin	g with any other organizati	on described in sect	ion 501(c)		Yes	No
	(other that	an section 501(c)(3) organ	izations) or in section	n 527, relating	to political organizations?	•				
a	Transfers	s from the reporting founda	ition to a noncharitat	ole exempt org	ganization of:					زـــــــــــــــــــــــــــــــــــــ
	(1) Cash	า						1a(1)		<u>X</u>
	(2) Othe	er assets						1a(2)		<u>X</u>
þ	Other tra	nsactions:								
	(1) Sale	s of assets to a noncharital	ole exempt organizati	ion				1b(1)		<u>X</u>
	(2) Purc	chases of assets from a nor	ncharitable exempt of	rganization				1b(2)	-	<u>X</u>
	(3) Rent	tal of facilities, equipment,	or other assets					1b(3)		<u>X</u>
	(4) Rein	nbursement arrangements						1b(4)		<u>X</u>
	(5) Loar	ns or loan guarantees						1b(5)		<u>X</u>
		ormance of services or me	•	-				1b(6)		<u>X</u>
	_	of facilities, equipment, mai	•	•	•			1c		X
d				_			market value of the goods, ot		ets,	
					ed less than fair market vali	ue in any transaction	or sharing arrangement, sho	w in		
_		d) the value of the goods, o			 					
a)∟	ne no	(b) Amount involved	(c) Name of		e exempt organization	(d) Description	n of transfers, transactions, and sh	arıng arra	angemen	ts
				N/A						
										
										
	-									
						+				
						+	.			
	-									
_										
						-				
	1- 4 4-						<u> </u>			
2 a		•	•	-	or more tax-exempt organ	nzations described		Yes	T	No
L		n 501(c) (other than section		JUN 327 F			<u>L</u>	162		ט זו נ
0	ii res, c	omplete the following sche (a) Name of org			(b) Type of organization	I	(c) Description of relationship	n		
		N/A	amzation		(b) Type of organization		(o) bescription of relationship	ν		
		M/A								
										
										
-	Unde	r penalties of perjury, I declare the	nat Mave examined this	return, including	accompanying schedules and s	statements, and to the be	est of my knowledge	L- IDC -	N	
Sig	n and b	pelief, it is truef correct, and com	ple Declaration of prep	parer (other than	taxpayer) is based on all informa	ation of which preparer b	TARY TREAS	with the	liscuss the prepare	r
He	re	hy (c	人 _I		18-17-2020	URER	snow X	_	? See ins	No
		nature of officer or trustee	<u>- v</u>		Date	Title		_ res		, 140
	Loig	Print/Type preparer's na	me	Preparer's si		Date	Check of PTIN			
		, po proparor a na			1:2=	-	self- employed			
Pa	id	WILLIAM D.	МАТТЕСОМ	 	_	08/17/20	P01	262	634	
_	eparer	Firm's name ► EID:				100/11/20	Firm's EIN ► 45-02			
	e Only		, ruttut ,				THIN SERVE 45 02		<i>-</i>	
_	,	Firm's address ▶ 62	1 N. ROBI	NSON A	VE., STE. 20	0	 			
					73102-6232	•	Phone no. 405-59	4-2	იიი	
		J. JR.	LINIOPHS CI	, OR	, , , , , , , , , , , , , , , , , , , ,	· · · ·				(2018)

FORM 990-PF DIVIDEN	DS AND INTER	REST FROM SECUE	RITIES ST	PATEMENT 1
GROSS SOURCE AMOUNT	CAPITAI GAINS DIVIDENI	REVENUE	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
INTEREST INCOME 6,26	1.	0. 6,261.	6,261.	
TO PART I, LINE 4 6,26	1.	6,261	6,261.	
FORM 990-PF	OTHER PROFES	SSIONAL FEES	S	PATEMENT 2
DESCRIPTION	(A) EXPENSES PER BOOKS			(D) CHARITABLE PURPOSES
INVESTMENT MANAGEMENT FEES	1,672.	1,672.		0.
TO FORM 990-PF, PG 1, LN 160	1,672.	1,672.		0.
FORM 990-PF DESCRIPTION	(A) EXPENSES	(B) NET INVEST-	(C)	ratement 3
	PER BOOKS	MENT INCOME		CHARITABLE
2017 FORM 990_DF FYCTCF	PER BOOKS	MENT INCOME	NET INCOME	
2017 FORM 990-PF EXCISE TAXES	221.			CHARITABLE
	· · ·	. 0.		CHARITABLE PURPOSES
TAXES	221	. 0.	NET INCOME	CHARITABLE PURPOSES 0.
TAXES TO FORM 990-PF, PG 1, LN 18	221	0.	NET INCOME	CHARITABLE PURPOSES 0. 0. TATEMENT 4
TAXES TO FORM 990-PF, PG 1, LN 18 FORM 990-PF	OTHER E	. 0. 0. EXPENSES (B) NET INVEST- MENT INCOME	NET INCOME (C) ADJUSTED	CHARITABLE PURPOSES 0. 0. TATEMENT 4 (D) CHARITABLE
TAXES TO FORM 990-PF, PG 1, LN 18 FORM 990-PF DESCRIPTION	OTHER I	. 0. O. EXPENSES (B) NET INVEST- MENT INCOME O.	NET INCOME (C) ADJUSTED	CHARITABLE PURPOSES 0. 0. TATEMENT 4 (D) CHARITABLE PURPOSES

FORM 990-PF CORPORATE STO	CK	STATEMENT 5
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
EQUITY	159,998.	159,998.
TOTAL TO FORM 990-PF, PART II, LINE 10B	159,998.	159,998.
FORM 990-PF CORPORATE BON	DS	STATEMENT 6
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
CORPORATE BONDS	112,398.	112,398.

FORM 990-PF	PART VIII - LIST TRUSTEES AND			RS	STAT	EMENT 7
NAME AND ADDRESS			AND COMP		EMPLOYEE BEN PLAN CONTRIB	EXPENSE
DAVID PAINE VICE P.O. BOX 18577 OKLAHOMA CITY, OK		(OCT-JUN) 1.00	/ PRESIDEN		J-SEP)	0.
KEVIN FILLMORE D P.O. BOX 18577 OKLAHOMA CITY, OK		(OCT-JUN) 1.00	/ VICE-PRE	s (JUI 0.	•	0.
MARK CARLIN P.O. BOX 18577 OKLAHOMA CITY, OK	73154	SECRETARY 1.00	//TREASURER	0.	0.	0.
RYAN TEUBNER PRE P.O. BOX 18577 OKLAHOMA CITY, OK		(OCT-JUN) 1.00	/ PAST PRE	SIDENT 0.	-	•
KEITH SHIDELER P.O. BOX 18577 OKLAHOMA CITY, OK	73154	DIRECTOR 1.00		0.	0.	0.
CODY CORNELIUS P.O. BOX 18577 OKLAHOMA CITY, OK	73154	DIRECTOR 1.00	(JUL-SEP)	0.	0.	0.
KELLY MCLEMORE P.O. BOX 18577 OKLAHOMA CITY, OK	73154	DIRECTOR 1.00	(JUL-SEP)	0.	0.	0.
ED NELSON P.O. BOX 18577 OKLAHOMA CITY, OK	73154	DIRECTOR 1.00	(JUL-SEP)	0.	0.	0.
DENNIS BOWMAN P.O. BOX 18577 OKLAHOMA CITY, OK	73154	DIRECTOR 1.00	(OCT-JUN)	0.	0.	0.
AVERY MOORE P.O. BOX 18577 OKLAHOMA CITY, OK	73154	DIRECTOR 1.00	(OCT-JUN)	0.	0.	0.

INDEPENDENT INSURANCE AGENTS ASSOCIA

73-6125907

TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII

0.

0.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION PART XV, LINES 2A THROUGH 2D

STATEMENT 8

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

KEVIN FILLMORE 9401 CEDAR LAKE AVE OKLAHOMA CITY, OK 73114

TELEPHONE NUMBER

NAME OF GRANT PROGRAM

405-843-5678

OKLAHOMA CITY INDEPENDENT INSURANCE AGENTS SCHOLARSHIPS

EMAIL ADDRESS

N/A

FORM AND CONTENT OF APPLICATIONS

SCHOLARSHIP APPLICATION MAY BE MAILED OR SUBMITTED ONLINE. INFORMATION TO BE PROVIDED INCLUDES GPA, STANDARDIZED TEST SCORES, HIGH SCHOOL TRANSCRIPTS, INFORMATION ON EXTRA CURRICULAR ACTIVITIES AND OTHER AWARDS AND RECOGNITIONS RECEIVED.

ANY SUBMISSION DEADLINES

THIS YEAR'S DEADLINE WAS MAY 1, 2020.

RESTRICTIONS AND LIMITATIONS ON AWARDS

SCHOLARSHIPS ARE GRANTED TO THE CHILDREN OF EMPLOYEES OF PUTNAM CITY SCHOOLS, OKLAHOMA CITY POLICE DEPARTMENT, OKLAHOMA CITY FIRE DEPARTMENT AND MEMBERS OF INDEPENDENT INSURANCE AGENTS ASSOCIATION OF GREATER OKLAHOMA CITY.