

For calendar year 2018, or tax year beginning 12-01-2018, and ending 11-30-2019

Name of foundation STEPHEN H STURGES & ROSE P STURGES CHARITABLE TRUST		A Employer identification number 86-0427923	
Number and street (or P.O. box number if mail is not delivered to street address) PO BOX 4997	Room/suite	B Telephone number (see instructions) (928) 783-8321	
City or town, state or province, country, and ZIP or foreign postal code YUMA, AZ 85366		C If exemption application is pending, check here ☐	
G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here..... ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ... ☐	
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶\$ 4,814,845	J Accounting method: ☐ Cash ☒ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)		
F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)				
	2 Check ☒ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	73	73	73	
	4 Dividends and interest from securities	113,230	113,230	113,230	
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10 _____	111,050			
	b Gross sales price for all assets on line 6a _____				
		1,412,498			
	7 Capital gain net income (from Part IV, line 2)		111,050		
	8 Net short-term capital gain			111,050	
	9 Income modifications				
Operating and Administrative Expenses	10a Gross sales less returns and allowances _____				
	b Less: Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	224,353	224,353	224,353	
	13 Compensation of officers, directors, trustees, etc.	16,000			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	16,498	8,249		8,249
	c Other professional fees (attach schedule)	40,000	20,000		20,000
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	1,627	1,627		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy	5,081	2,541		2,540
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	32,926	29,268		3,658
	24 Total operating and administrative expenses. Add lines 13 through 23	112,132	61,685		34,447
	25 Contributions, gifts, grants paid	215,000			215,000
	26 Total expenses and disbursements. Add lines 24 and 25	327,132	61,685		249,447
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	-102,779			
	b Net investment income (if negative, enter -0-)		162,668		
c Adjusted net income (if negative, enter -0-)				224,353	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)			
		Beginning of year	End of year		
		(a) Book Value	(b) Book Value	(c) Fair Market Value	
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	38,069	102,658	102,658
	3	Accounts receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges	2,864	2,253	2,237
	10a	Investments—U.S. and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	2,140,159	2,137,285	2,704,112
	c	Investments—corporate bonds (attach schedule)	1,743,464	1,715,512	1,755,668
	11	Investments—land, buildings, and equipment: basis ▶ _____ 5,155 Less: accumulated depreciation (attach schedule) ▶ _____ 5,155			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	336,688	208,090	250,170
	14	Land, buildings, and equipment: basis ▶ _____ 5,155 Less: accumulated depreciation (attach schedule) ▶ _____ 5,155			
15	Other assets (describe ▶ _____)				
16	Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	4,261,244	4,165,798	4,814,845	
Liabilities	17	Accounts payable and accrued expenses		7,333	
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)		7,333	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds	4,261,244	4,158,465	
	28	Paid-in or capital surplus, or land, bldg., and equipment fund			
29	Retained earnings, accumulated income, endowment, or other funds				
30	Total net assets or fund balances (see instructions)	4,261,244	4,158,465		
31	Total liabilities and net assets/fund balances (see instructions) .	4,261,244	4,165,798		

Part III Analysis of Changes in Net Assets or Fund Balances			
1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	4,261,244
2	Enter amount from Part I, line 27a	2	-102,779
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3	4	4,158,465
5	Decreases not included in line 2 (itemize) ▶ _____	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	4,158,465

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a See Additional Data Table				
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a See Additional Data Table			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a See Additional Data Table			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	111,050
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8		3	111,050

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?



Yes



No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2017	237,328	4,830,449	0.04913
2016	227,356	4,668,908	0.04870
2015	234,607	4,516,383	0.05195
2014	237,057	4,758,377	0.04982
2013	223,095	4,833,548	0.04616

2 Total of line 1, column (d)	2	0.245749
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years	3	0.049150
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	4,648,112
5 Multiply line 4 by line 3	5	228,455
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,627
7 Add lines 5 and 6	7	230,082
8 Enter qualifying distributions from Part XII, line 4	8	249,447

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b	1	1,627
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	
3	Add lines 1 and 2.	3	1,627
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	1,627
6	Credits/Payments:		
a	2018 estimated tax payments and 2017 overpayment credited to 2018	6a	3,880
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d.	7	3,880
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed ▶	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid ▶	10	2,253
11	Enter the amount of line 10 to be: Credited to 2019 estimated tax ▶ 2,253 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 any political campaign?		No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition). <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>		No
c Did the foundation file Form 1120-POL for this year?		No
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? <i>If "Yes," attach a detailed description of the activities.</i>		No
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>		No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		No
b If "Yes," has it filed a tax return on Form 990-T for this year?		No
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>		No
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	Yes	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	Yes	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ AZ _____		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation .</i>	Yes	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2018 or the taxable year beginning in 2018? See the instructions for Part XIV. <i>If "Yes," complete Part XIV</i>		No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>		No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ <u>N/A</u>	13	Yes	
14	The books are in care of ▶ <u>STURGES CHARITABLE TRUST</u> Telephone no. ▶ <u>(928) 783-8321</u>			

Located at ▶ 833 PLAZA CIRCLE STE 200 YUMA AZZIP+4 ▶ 85365

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here ▶ ☐ and enter the amount of tax-exempt interest received or accrued during the year ▶ 15			
16	At any time during calendar year 2018, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign country ▶	16	Yes	No

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required**File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.**

		Yes	No
1a	During the year did the foundation (either directly or indirectly):		
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No		
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No		
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No		
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No		
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No		
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions ☐ Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐	1b	No
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2018?	1c	No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a	At the end of tax year 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2018? ☐ Yes ☒ No If "Yes," list the years ▶ 20____, 20____, 20____, 20____		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions.)	2b	No
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ▶ 20____, 20____, 20____, 20____		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No		
b	If "Yes," did it have excess business holdings in 2018 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2018.)	3b	No
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2018?	4b	No

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

5a	During the year did the foundation pay or incur any amount to:		Yes	No
(1)	Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes ☒ No		
(2)	Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	☐ Yes ☒ No		
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	☒ Yes ☐ No		
(4)	Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions.	☐ Yes ☒ No		
(5)	Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes ☒ No		
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions.		5b	No
	Organizations relying on a current notice regarding disaster assistance check here.	☐		
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? If "Yes," attach the statement required by Regulations section 53.4945–5(d).	☐ Yes ☒ No		
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes ☒ No	6b	No
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870.			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes ☒ No	7b	No
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?			
8	Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment during the year?	☐ Yes ☒ No		

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation. See instructions				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Additional Data Table				
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000.				

Part VIII **Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** *(continued)*

3 **Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services. ►

Part IX-A **Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1 NONE	0
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1	
2	
All other program-related investments. See instructions.	
3	

Total. Add lines 1 through 3 ►

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities.	1a	4,585,880
b	Average of monthly cash balances.	1b	133,015
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	4,718,895
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	
3	Subtract line 2 from line 1d.	3	4,718,895
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	70,783
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	4,648,112
6	Minimum investment return. Enter 5% of line 5.	6	232,406

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6.	1	232,406
2a	Tax on investment income for 2018 from Part VI, line 5.	2a	1,627
b	Income tax for 2018. (This does not include the tax from Part VI.).	2b	
c	Add lines 2a and 2b.	2c	1,627
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	230,779
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	230,779
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	230,779

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26.	1a	249,447
b	Program-related investments—total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	249,447
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions.	5	1,627
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	247,820

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2017	(c) 2017	(d) 2018
1 Distributable amount for 2018 from Part XI, line 7				230,779
2 Undistributed income, if any, as of the end of the 2018:				
a Enter amount for 2017 only.			191,943	
b Total for prior years: 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2018:				
a From 2013.				
b From 2014.				
c From 2015.				
d From 2016.				
e From 2017.				
f Total of lines 3a through e.				
4 Qualifying distributions for 2018 from Part XII, line 4: ► \$ 249,447				
a Applied to 2017, but not more than line 2a			191,943	
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2018 distributable amount.				57,504
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2018. (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
b Prior years' undistributed income. Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b. Taxable amount—see instructions.				
e Undistributed income for 2017. Subtract line 4a from line 2a. Taxable amount—see instructions.				
f Undistributed income for 2018. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2019.				173,275
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).				
8 Excess distributions carryover from 2013 not applied on line 5 or line 7 (see instructions).				
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a.				
10 Analysis of line 9:				
a Excess from 2014.				
b Excess from 2015.				
c Excess from 2016.				
d Excess from 2017.				
e Excess from 2018.				

Part XIV

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

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

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	Tax year	Prior 3 years			(e) Total
		(a) 2018	(b) 2017	(c) 2016	(d) 2015	

b 85% of line 2a					
-----------------------------------	--	--	--	--	--

c Qualifying distributions from Part XII, line 4 for each year listed								
--	--	--	--	--	--	--	--	--

d	Amounts included in line 2c not used directly for active conduct of exempt activities				
----------	---	--	--	--	--

e	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
---	---	--	--	--	--	--

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

a	"Assets" alternative test—enter:					
---	----------------------------------	--	--	--	--	--

(1) Value of all assets					
-----------------------------------	--	--	--	--	--

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

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

c "Support" alternative test—enter:					
-------------------------------------	--	--	--	--	--

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

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

(3) Largest amount of support from an exempt organization					
---	--	--	--	--	--

(4) Gross investment income					
-----------------------------	--	--	--	--	--

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

1 Information Regarding Foundation Managers:

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

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

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

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

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

STURGES CHARITABLE TRUST
833 PLAZA CIRCLE
YUMA, AZ 85364
(928) 783-8321

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

c Any submission deadlines:
WITHIN 45 DAYS OF AWARDS

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

PER INTENDED REQUEST AWARDED

Part XV **Supplementary Information** (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
See Additional Data Table				
Total			▶ 3a	
b <i>Approved for future payment</i>				
Total			▶ 3b	

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions.)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue:					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments.					
3 Interest on savings and temporary cash investments			14	73	
4 Dividends and interest from securities.			14	113,230	
5 Net rental income or (loss) from real estate:					
a Debt-financed property.					
b Not debt-financed property.					
6 Net rental income or (loss) from personal property					
7 Other investment income.					
8 Gain or (loss) from sales of assets other than inventory					111,050
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).				113,303	111,050
13 Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calculations.)			13		224,353

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

[illegible]

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			Yes	No
a Transfers from the reporting foundation to a noncharitable exempt organization of:				
(1) Cash.		1a(1)		No
(2) Other assets.		1a(2)		No
b Other transactions:				
(1) Sales of assets to a noncharitable exempt organization.		1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization.		1b(2)		No
(3) Rental of facilities, equipment, or other assets.		1b(3)		No
(4) Reimbursement arrangements.		1b(4)		No
(5) Loans or loan guarantees.		1b(5)		No
(6) Performance of services or membership or fundraising solicitations.		1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.		1c		No
d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.				

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.		
	*****	2020-06-02	*****
	_____ Signature of officer or trustee	_____ Date	_____ Title

May the IRS discuss this return with the preparer shown below
 (see instr.)? ☒ **Yes** ☐ **No**

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN P00187169
	Jayne H Wright				
	Firm's name ▶ CPA Financial Advantage PC				Firm's EIN ▶ 86-0483892
	Firm's address ▶ 798 W 28th Street Yuma, AZ 85364				Phone no. (928) 344-3003

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d			
List and describe the kind(s) of property sold (e.g., real estate, (a) 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1 PUBLICLY TRADED SECURITIES	P	2018-01-01	2019-01-01
1 PUBLICLY TRADED SECURITIES	P	2018-01-01	2019-01-01
PUBLICLY TRADED SECURITIES	P	2018-01-01	2019-01-01
PUBLICLY TRADED SECURITIES	P	2018-01-01	2019-01-01
PUBLICLY TRADED SECURITIES	P	2018-01-01	2019-01-01
PUBLICLY TRADED SECURITIES	P	2018-01-01	2019-01-01
PUBLICLY TRADED SECURITIES	P	2018-01-01	2019-01-01
PUBLICLY TRADED SECURITIES	P	2018-01-01	2019-01-01
PUBLICLY TRADED SECURITIES	P	2018-01-01	2019-01-01
PUBLICLY TRADED SECURITIES	P	2018-01-01	2019-01-01
PUBLICLY TRADED SECURITIES	P	2018-01-01	2019-01-01

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
2,917		2,585	332
77,428		79,061	-1,633
11,995			11,995
734,610		746,574	-11,964
432,557		349,985	82,572
3,763		3,668	95
79			79
5,221		5,100	121
138,915		114,475	24,440
5,013			5,013

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
			332
			-1,633
			11,995
			-11,964
			82,572
			95
			79
			121
			24,440
			5,013

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation				
(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
GEORGE GALLAHER	Trustee 1.00	2,000		
PO BOX 2997 YUMA, AZ 853662997				
LINDA RUNDELL	Trustee 1.00	2,000		
9670 Bluffs Corner Fort Wayne, IN 46825				
AMY DORADO	Trustee 1.00	2,000		
30451 PELICAN BAY UNIT D MURRIETA, CA 82563				
CAM CONG	Trustee 1.00	2,000		
1349 S 33RD DR Yuma, AZ 85364				
Gary Black	Trustee 1.00	2,000		
16620 S Avenue A Somerton, AZ 85350				
VALARIE DONNELLY	Trustee 1.00	2,000		
1542 W 12th Ln YUMA, AZ 853648907				
Kathleen Bench	Trustee 1.00	2,000		
5800 Eastview Dr Edina, MN 55436				
STEPHEN SCHOENHERR	Trustee 1.00	2,000		
4980 E EL PASO BAC TUCSON, AZ 85318				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Arizona Community Foundation of Yum 2201 E Camelback Road Suite 405B Phoenix, AZ 85016	none	PC	Community	85,000
Yisong LinU of Illinois Champagne Urbana, IL 61801	none	I	Scholarship	2,500
Ben DeckeyBrown University Providence, RI 02912	none	I	Scholarship	2,500
Total ▶ 3a				215,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
Jennifer YoungDuke University Durham, NC 27708	None	I	Scholarship	3,000
Bridgette SotoArizona State University Tempe, AZ 85281	None	I	Scholarship	1,500
Jocelyn GalindoPrinceton University Princeton, NJ 08544	None	I	Scholarship	3,000
Total ▶ 3a				215,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Mariana De La Cruz Arizona State University Tempe, AZ 85281	None	I	Scholarship	1,500
Kylee Simpson Northern Arizona University Flagstaff, AZ 86011	none	I	Scholarship	1,250
Allison TaylorNotre Dame Notre Dame, IN 46556	NONE	I	scholarship	3,000
Total ▶ 3a				215,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Jared Duran University of Southern California Los Angeles, CA 90089	None	I	Scholarship	3,000
Bianca CarrascoUniversity of Arizona Tucson, AZ 85721	None	I	Scholarship	3,000
Joshua GrayColumbia University New York, NY 10027	NONE	I	scholarship	1,500
Total ▶ 3a				215,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Brenda VillaArizona State University Tempe, AZ 85281	None	I	Scholarship	1,250
Omar CastilloArizona State University Tempe, AZ 85281	None	I	Scholarship	1,250
Jeremy Guerrero Arizona State University Tempe, AZ 85281	None	I	Scholarship	1,500
Total ▶ 3a				215,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Sandra MaganaArizona State University Tempe, AZ 85281	None	I	Scholarship	1,500
Angela LozanoArizona State University Tempe, AZ 85281	None	I	Scholarship	1,250
Zevin GamezArizona State University Tempe, AZ 85281	None	I	Scholarship	1,500
Total ▶ 3a				215,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Aaron Valenzuela Arizona State University Tempe, AZ 85281	None	I	Scholarship	1,500
Susana PugaArizona State University Tempe, AZ 85281	None	I	Scholarship	1,250
Sidney CoArizona State University Tempe, AZ 85281	None	I	Scholarship	1,250
Total ▶ 3a				215,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Lizbeth MarquezArizona Western College Yuma, AZ 85365	None	I	Scholarship	1,500
Juan MartinezArizona Western College Yuma, AZ 85365	None	I	Scholarship	1,500
Samantha NietoArizona Western College Yuma, AZ 85365	None	I	Scholarship	1,500
Total ▶ 3a				215,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Jesus RoldanArizona Western College Yuma, AZ 85365	None	I	Scholarship	1,500
Brianna ArriayaArizona Western College Yuma, AZ 85365	None	I	Scholarship	1,500
Kailee BunteNorthern Arizona University Flagstaff, AZ 86011	none	I	Scholarship	3,000
Total ▶ 3a				215,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Jacob CongNorthern Arizona University Flagstaff, AZ 86011	none	I	Scholarship	2,500
Taicey Johnson Northern Arizona University Flagstaff, AZ 86011	none	I	Scholarship	2,500
Laura Sanderson Northern Arizona University Flagstaff, AZ 86011	none	I	Scholarship	3,000
Total ▶ 3a				215,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Savanna Matthews Northern Arizona University Flagstaff, AZ 86011	none	I	Scholarship	1,500
Zevin Gamez Northern Arizona University Flagstaff, AZ 86011	none	I	Scholarship	1,500
Lizbeth Marquez Northern Arizona University Flagstaff, AZ 86011	none	I	Scholarship	1,500
Total ▶ 3a				215,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Bridgette Soto Northern Arizona University Flagstaff, AZ 86011	none	I	Scholarship	1,500
Emily KisselNorthern Arizona University Flagstaff, AZ 86011	none	I	Scholarship	1,500
Arron Valenzuela Northern Arizona University Flagstaff, AZ 86011	none	I	Scholarship	1,500
Total ▶ 3a				215,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Mariana De La Cruz Northern Arizona University Flagstaff, AZ 86011	none	I	Scholarship	1,500
Jeremy Guerrero Northern Arizona University Flagstaff, AZ 86011	none	I	Scholarship	1,500
Sandra Magana Northern Arizona University Flagstaff, AZ 86011	none	I	Scholarship	1,500
Total ▶ 3a				215,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Angela Lozano Northern Arizona University Flagstaff, AZ 86011	none	I	Scholarship	1,250
Brenda Villa-Prebot Northern Arizona University Flagstaff, AZ 86011	none	I	Scholarship	1,250
Talen Osborn Northern Arizona University Flagstaff, AZ 86011	none	I	Scholarship	1,500
Total ▶ 3a				215,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Susana PugaNorthern Arizona University Flagstaff, AZ 86011	none	I	Scholarship	1,250
Leah KistUniversity of Arizona Tucson, AZ 85721	None	I	Scholarship	3,000
Megan CorderyUniversity of Arizona Tucson, AZ 85721	None	I	Scholarship	3,000
Total ▶ 3a				215,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Dianara RamirezUniversity of Arizona Tucson, AZ 85721	None	I	Scholarship	3,000
Sarah SanasacUniversity of Arizona Tucson, AZ 85721	None	I	Scholarship	3,000
Jack SchmidgallUniversity of Arizona Tucson, AZ 85721	None	I	Scholarship	3,000
Total ▶ 3a				215,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Bethany PenfoldUniversity of Arizona Tucson, AZ 85721	None	I	Scholarship	2,500
Samantha UrquidezUniversity of Arizona Tucson, AZ 85721	None	I	Scholarship	3,000
Brandon MojardinUniversity of Arizona Tucson, AZ 85721	None	I	Scholarship	2,500
Total ▶ 3a				215,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Allison OsowskiUniversity of Arizona Tucson, AZ 85721	None	I	Scholarship	2,500
Carmen AveryUniversity of Arizona Tucson, AZ 85721	None	I	Scholarship	3,000
Marcia LopezUniversity of Arizona Tucson, AZ 85721	None	I	Scholarship	1,250
Total ▶ 3a				215,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Ryan WatersUniversity of Arizona Tucson, AZ 85721	None	I	Scholarship	1,250
Valery GonzalezUniversity of Arizona Tucson, AZ 85721	None	I	Scholarship	3,000
Hannah SmithUniversity of Arizona Tucson, AZ 85721	None	I	Scholarship	1,250
Total ▶ 3a				215,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
David NickersonUniversity of Arizona Tucson, AZ 85721	None	I	Scholarship	1,250
Veronica BoydUniversity of Arizona Tucson, AZ 85721	None	I	Scholarship	2,500
Jessica GroveUniversity of Arizona Tucson, AZ 85721	None	I	Scholarship	1,500
Total ▶ 3a				215,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Nicole NegreteUniversity of Arizona Tucson, AZ 85721	None	I	Scholarship	1,500
Shelby JonesUniversity of Arizona Tucson, AZ 85721	None	I	Scholarship	1,500
Skyelynn BermudezUniversity of Arizona Tucson, AZ 85721	None	I	Scholarship	1,500
Total ▶ 3a				215,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Anthony NunezUniversity of Arizona Tucson, AZ 85721	None	I	Scholarship	1,500
Judith MitchellUCLA Los Angeles, CA 90095	NONE	I	scholarship	3,000
Jillian KravitzUCLA Los Angeles, CA 90095	NONE	I	scholarship	1,500
Total ▶ 3a				215,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Alyssa CallahanUCLA Los Angeles, CA 90095	NONE	I	scholarship	2,500
Alyssa Callahan University of Southern California Los Angeles, CA 90089	None	I	Scholarship	1,250
Total ▶ 3a				215,000

TY 2018 Accounting Fees Schedule

Name: STEPHEN H STURGES & ROSE P STURGES
CHARITABLE TRUST

EIN: 86-0427923

Software ID: 18007218

Software Version: 2018v3.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BOOKKEEPING AND TAX PREP	16,498	8,249	0	8,249

TY 2018 Investments Corporate Bonds Schedule

Name: STEPHEN H STURGES & ROSE P STURGES
CHARITABLE TRUST

EIN: 86-0427923

Software ID: 18007218

Software Version: 2018v3.1

Investments Corporate Bonds Schedule

Name of Bond	End of Year Book Value	End of Year Fair Market Value
Mutual of Omaha - CORPORATE BONDS	856,122	863,156
Northern Trust - CORPORATE BONDS	859,390	892,512

TY 2018 Investments Corporate Stock Schedule

Name: STEPHEN H STURGES & ROSE P STURGES
CHARITABLE TRUST

EIN: 86-0427923

Software ID: 18007218

Software Version: 2018v3.1

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
Mutual of Omaha - CORPORATE STOCK	1,322,993	1,695,650
Northern Trust -- CORPORATE STOCK	814,292	1,008,462

TY 2018 Investments - Land Schedule

Name: STEPHEN H STURGES & ROSE P STURGES
CHARITABLE TRUST

EIN: 86-0427923

Software ID: 18007218

Software Version: 2018v3.1

Category/ Item	Cost/Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
Furniture and Fixtures	5,155	5,155		

TY 2018 Investments - Other Schedule

Name: STEPHEN H STURGES & ROSE P STURGES
CHARITABLE TRUST

EIN: 86-0427923

Software ID: 18007218

Software Version: 2018v3.1

Investments Other Schedule 2

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
Mutual of Omaha - Money Market Account	AT COST	18,325	18,325
Northern Trust -- Commodities	AT COST	82,514	104,691
Northern Trust -- CASH	AT COST	33,948	33,989
Northern Trust -- Real Estate	AT COST	73,303	93,165

**TY 2018 Land, Etc.
Schedule**

Name: STEPHEN H STURGES & ROSE P STURGES
CHARITABLE TRUST

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Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
Furniture and Fixtures	5,155	5,155		

TY 2018 Other Expenses Schedule

Name: STEPHEN H STURGES & ROSE P STURGES
CHARITABLE TRUST

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Software ID: 18007218

Software Version: 2018v3.1

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BANK CHARGES	30			30
DOMAIN RENEWAL	31	16		15
INSURANCE	3,017			3,017
INVESTMENT FEES	28,706	28,706		
OFFICE SUPPLIES	1,092	546		546
POSTAGE	50			50

TY 2018 Other Professional Fees Schedule

Name: STEPHEN H STURGES & ROSE P STURGES
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Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
1Trust Administrator	40,000	20,000	0	20,000

TY 2018 Taxes Schedule

Name: STEPHEN H STURGES & ROSE P STURGES
CHARITABLE TRUST

EIN: 86-0427923

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Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Excise tax	1,627	1,627		