

Form 990-PF

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

OMB No 1545-0047

2019

Department of the Treasury Internal Revenue Service

Do not enter social security numbers on this form as it may be made public. Go to www.irs.gov/Form990PF for instructions and the latest information.

Open to Public Inspection

For calendar year 2019 or tax year beginning , and ending

Name of foundation: BEN D. SPAGOLIO CHARITABLE TRUST C/O JAMES C. BOHORAD, TRUSTEE. Employer identification number: 13-7345617. Telephone number: 570-622-1811. City: POTTSVILLE PA 17901-7280. Accounting method: Cash.

Table with 5 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes. Rows include Revenue (Total: 20,812), Operating and Administrative Expenses (Total: 16,707), and Adjusted net income (4,105).

SCANNED MAR 3 0 2022

599096 Operating and Administrative Expenses 0423219855 JUN 25 2021

1912

04

6

MAY 27 2021 RECEIVED INVENTORY DEPT

RECEIVED IN CORRESP IRS - OSC 15

APR 23 2021

OGDEN, UTAH

31

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	4,464	3,846	3,846
	2	Savings and temporary cash investments	25,507	3,395	3,395
	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 (att. schedule) ▶ Less allowance for doubtful accounts ▶	0		
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments – U S and state government obligations (attach schedule)			
	b	Investments – corporate stock (attach schedule) SEE STMT 5	264,953	291,788	297,353
	c	Investments – corporate bonds (attach schedule)			
	11	Investments – land, buildings, and equipment: basis ▶ Less accumulated depreciation (attach sch) ▶			
	12	Investments – mortgage loans			
	13	Investments – other (attach schedule)			
	14	Land, buildings, and equipment: basis ▶ Less accumulated depreciation (attach sch) ▶			
15	Other assets (describe ▶)				
16	Total assets (to be completed by all filers – see the instructions Also, see page 1, item I)	294,924	299,029	304,594	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here and complete lines 24, 25, 29, and 30. ▶ <input type="checkbox"/>				
	24	Net assets without donor restrictions			
	25	Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here and complete lines 26 through 30. ▶ <input checked="" type="checkbox"/>				
	26	Capital stock, trust principal, or current funds			
	27	Paid-in or capital surplus, or land, bldg, and equipment fund			
	28	Retained earnings, accumulated income, endowment, or other funds	294,924	299,029	
29	Total net assets or fund balances (see instructions)	294,924	299,029		
30	Total liabilities and net assets/fund balances (see instructions)	294,924	299,029		

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 29 (must agree with end-of-year figure reported on prior year's return)
2	Enter amount from Part I, line 27a
3	Other increases not included in line 2 (itemize) ▶
4	Add lines 1, 2, and 3
5	Decreases not included in line 2 (itemize) ▶
6	Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 29

1	294,924
2	4,105
3	
4	299,029
5	
6	299,029

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	WADDELL & REED CAP GAIN DIST			
b	MID PENN BANK			
c	PUBLICLY TRADED SECURITIES			
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	6,658			6,658
b	841			841
c	27,000		26,989	11
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) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			6,658
b			841
c			11
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	7,510
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) See instructions If (loss), enter -0- in Part I, line 8 }	3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? Yes No

If "Yes," the foundation doesn't qualify under section 4940(e) Do not complete this part

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2018	12,355	287,686	0.042946
2017	11,575	268,501	0.043110
2016	14,488	264,531	0.054769
2015	12,696	267,358	0.047487
2014	11,495	270,849	0.042441

2	Total of line 1, column (d)	2	0.230753
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	0.046151
4	Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	288,986
5	Multiply line 4 by line 3	5	13,337
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	156
7	Add lines 5 and 6	7	13,493
8	Enter qualifying distributions from Part XII, line 4	8	14,175

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 Exoicse 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 <input type="checkbox"/> 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 <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	156
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations, enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)	2	0
3	Add lines 1 and 2	3	156
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)	4	0
5	Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-	5	156
6	Credits/Payments		
a	2019 estimated tax payments and 2018 overpayment credited to 2019	6a	
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	
8	Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> 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	156
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 2020 estimated tax Refunded	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a		<input checked="" type="checkbox"/>
b		<input checked="" type="checkbox"/>
c		<input checked="" type="checkbox"/>
d		
e		
2		<input checked="" type="checkbox"/>
3		<input checked="" type="checkbox"/>
4a		<input checked="" type="checkbox"/>
b		
5		<input checked="" type="checkbox"/>
6	<input checked="" type="checkbox"/>	
7	<input checked="" type="checkbox"/>	
8a		
b	<input checked="" type="checkbox"/>	
9		<input checked="" type="checkbox"/>
10		<input checked="" type="checkbox"/>

N/A

2

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
- 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
- 13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► **N/A**
- 14 The books are in care of ► **JAMES C. BOHORAD** Telephone no ► **570-622-1811**
P.O. BOX 1280

	Yes	No
11		X
12		X
13	X	

- Located at ► **POTTSVILLE** PA ZIP+4 ► **17901-7280**
- 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 2019, 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 ►

	Yes	No
16		X

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

- 1a During the year, did the foundation (either directly or indirectly)
 - (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 **N/A**
- 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 2019? **N/A**
- 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 2019, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2019? 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) **N/A**
 - 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 2019 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 Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019) **N/A**
- 4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?
- 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 2019?

	Yes	No
1b		
1c		
2b		
3b		
4a		X
4b		X

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

			Yes	No
5a During the year did the foundation pay or incur any amount to				
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No		
(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No		
(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No		
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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. Organizations relying on a current notice regarding disaster assistance, check here		N/A	5b	
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)	N/A	<input type="checkbox"/> Yes <input type="checkbox"/> No		
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No		
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870			6b	X
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No		
b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?		N/A	7b	
8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No		

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

1 List all officers, directors, trustees, and foundation managers and their compensation. 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
JAMES C. BOHORAD P.O. BOX 1280	POTTSVILLE PA 17901-7280	TRUSTEE 2.00	0	0

2 Compensation of five highest-paid employees (other than those included on line 1 – see instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over \$50,000 0

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

3 Five highest-paid independent contractors for professional services. See instructions. If none, enter "NONE."

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

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

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 N/A	
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 N/A	
2	
3 All other program-related investments. See instructions	
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	274,849
b	Average of monthly cash balances	1b	18,538
c	Fair market value of all other assets (see instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	293,387
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	293,387
4	Cash deemed held for charitable activities Enter 1½% of line 3 (for greater amount, see instructions)	4	4,401
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	288,986
6	Minimum investment return. Enter 5% of line 5	6	14,449

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	14,449
2a	Tax on investment income for 2019 from Part VI, line 5	2a	156
b	Income tax for 2019 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	156
3	Distributable amount before adjustments Subtract line 2c from line 1	3	14,293
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	14,293
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	14,293

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	14,175
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	14,175
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	156
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	14,019

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 2018	(c) 2018	(d) 2019
1 Distributable amount for 2019 from Part XI, line 7				14,293
2 Undistributed income, if any, as of the end of 2019				
a Enter amount for 2018 only			13,752	
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2019				
a From 2014				
b From 2015				
c From 2016				
d From 2017				
e From 2018				
f Total of lines 3a through e				
4 Qualifying distributions for 2019 from Part XII, line 4 ▶ \$ 14,175				
a Applied to 2018, but not more than line 2a			13,752	
b Applied to undistributed income of prior years (Election required – see instructions)				
c Treated as distributions out of corpus (Election required – see instructions)				
d Applied to 2019 distributable amount				423
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2019 (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 2018 Subtract line 4a from line 2a Taxable amount – see instructions				
f Undistributed income for 2019 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2020				13,870
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 2014 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9				
a Excess from 2015				
b Excess from 2016				
c Excess from 2017				
d Excess from 2018				
e Excess from 2019				

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2019, enter the date of the ruling

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

	Tax year		Prior 3 years		(e) Total
	(a) 2019	(b) 2018	(c) 2017	(d) 2016	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4, for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test - enter: (1) Value of all assets (2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6, for each year listed					
c "Support" alternative test - enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) (2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii) (3) Largest amount of support from an exempt organization (4) Gross investment income					

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

1 Information Regarding Foundation Managers:

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

N/A

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

N/A

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

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

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

**JAMES C. BOHORAD, TRUSTEE 570-622-1811
P.O. BOX 1280 POTTSVILLE PA 17901-7280**

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

SEE STATEMENT 6

c Any submission deadlines

NONE

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

NONE

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 Paid during the year				
A FOUNDATION OF PHILANTHROPIC FUNDS 520 8TH AVE. NEW YORK NY 10018	N/A	501 (C) (3)	PUBLIC CHARITY	
ABRAMSON FAMILY CANCER RES. CENTER 3535 MARKET ST. SUITE 750 PHILADELPHIA PA 19104	N/A	501 (C) (3)	FOR ASSISTANCE WITH RESEARCH	100
ALL AGES READ TOGETHER 8 C S ST. SW LEESBURG VA 20175	N/A	501 (C) (3)	FOR ASSISTANCE WITH EDUCATION	
ALMOST HOME ANIMAL SANCTUARY 200 LIMEKILN ROAD READING PA 19606	N/A	501 (C) (3)	PUBLIC CHARITY	
ALS ASSOCIATION 1275 K ST. NW WASHINGTON DC 20005	N/A	501 (C) (3)	PUBLIC CHARITY	
AMERICAN CANCER SOCIETY 16 N. 4TH ST. MINERSVILLE PA 17954	N/A	501 (C) (3)	FOR ASSISTANCE WITH CANCER RESEARCH	
AMERICAN HEART ASSOCIATION 610 COMMUNITY WAY LANCASTER PA 17603	N/A	501 (C) (3)	CHARITABLE	
ARNOLD DELIN SCHOLARSHIP FUND 17 MAPLE AVE., PO BOX 130 MARLIN PA 17951	N/A	501 (C) (3)	FOR ASSISTANCE WITH EDUCATION	
ARTIS - NAPLES 5833 PELICAN BAY BLVD. NAPLES FL 34108	N/A		FOR ASSISTANCE WITH THE ARTS	
ASHLAND PUBLIC LIBRARY 1229 CENTRE STREET ASHLAND PA 17921	N/A	501 (C) (3)	PUBLIC CHARITY	
Total			▶ 3a	14,175
b Approved for future payment				
N/A				
Total			▶ 3b	

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year AVENUES 2 PARK STREET POTTSVILLE PA 17901	N/A	501 (C) (3)	FOR ASSISTANCE TO THE DISABLED	1,150
AVON 39 WALK TO END BREAST 1 AVON PLAZA RYE NY 10580	N/A	501 (C) (3)	PUBLIC CHARITY	
BAREFIELD DEVELOPMENT CORPORATION 410 LAUREL BOULEVARD POTTSVILLE PA 17901	N/A	501 (C) (3)	PUBLIC CHARITY	
BIG BROTHERS/BIG SISTERS 2202 N. WESTSHORE BLVD. TAMPA FL 33607	N/A	501 (C) (3)	PUBLIC CHARITY	
BIG IMPACT GROUP OF SCHUYLKILL CTY. 23 MEADOW BROOK DRIVE SCHUYLKILL HAVEN PA 17972	N/A	501 (C) (3)	CHARITABLE	
BISHOP'S ANNUAL APPEAL PO BOX F ALLENTOWN PA 18105	N/A	CHURCH	FOR ASSISTANCE WITH RELIGION	
BLUE MOUNT. BOYS BASKETBALL BOOSTER ORWIGSBURG ORWIGSBURG PA 17961	N/A		CHARITABLE	75
BLUE MOUNTAIN EAGLE FOUND 675 REDDALE ROAD ORWIGSBURG PA 17961	N/A	501 (C) (3)	FOR ASSISTANCE WITH YOUTH	100
BLUE MOUNTAIN PTO 685 RED DALE ROAD ORWIGSBURG PA 17961	N/A	SCHOOL	FOR ASSISTANCE WITH EDUCATION	600
BLUE MOUNTAIN TRACK BOOSTERS 48 RED MOUNTAIN LANE NEW RINGGOLD PA 17960	N/A	YOUTH SPORTS	FOR ASSISTANCE WITH YOUTH SPORTS	
Total			▶ 3a	
b Approved for future payment N/A				
Total			▶ 3b	

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i> BOROUGH OF ORWIGSBURG FIRE DEPT PO BOX 205 ORWIGSBURG PA 17961	N/A FOR ASSISTANCE WITH FIRE	FIRE CO.	FIGHTING	
BOSTON COLLEGE LAW SCHOOL 885 CENTRE STREET NEWTON MA 02459	NONE FOR ASSISTANCE WITH EDUCATION	SCHOOL	EDUCATION	
BOY SCOUTS OF AMERICA 1325 N. WALNUT HILL LANE IRVING TX 75015	N/A	501 (C) (3)	PUBLIC CHARITY	
BRADY CENTER TO PREVENT GUN VIOLENC 840 FIRST STREET NE WASHINGTON DC 20002	N/A	501 (C) (3)	PUBLIC CHARITY	
BRYN MAWR COLLEGE 101 N. MERION AVE. BRYN MAWR PA 19010	N/A FOR ASSISTANCE WITH EDUCATION	SCHOOL	EDUCATION	
CALDERONE MEMORIAL SCHOLARSHIP FD POTTSVILLE POTTSVILLE PA 17901	N/A FOR ASSISTANCE WITH EDUCATION	501 (C) (3)	EDUCATION	
CAPT. JASON B. JONES MEMORIAL FOUND 4605 BROOKSIDE COURT ORWIGSBURG PA 17961	N/A	501 (C) (3)	PUBLIC CHARITY	250
CHABAD LUBAVITCH 382 SOUTH CENTRE STREET POTTSVILLE PA 17901	N/A FOR ASSISTANCE WITH RELIGION	CHURCH	RELIGION	
CHAR WILL GERMAN SHEPHERD RESCUE 2 E. RAILROAD AVE. NEW RINGGOLD PA 17960	N/A	501 (C) (3)	CHARITABLE	250
CHARLES BABER PRESERVATION TRUST 200 SOUTH SECOND STREET POTTSVILLE PA 17901	N/A	501 (C) (3)	PUBLIC CHARITY	100
Total			▶ 3a	
b <i>Approved for future payment</i> N/A				
Total			▶ 3b	

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i> CHILDHOOD LEUKEMIA FOUNDATION PO BOX 21069 LANSING MI 48909	N/A	501 (C) (3) PUBLIC CHARITY		
CHILDREN'S CANCER RECOVERY FOUND PO BOX 238 HERSHEY PA 17033	N/A	501 (C) (3) PUBLIC CHARITY		
CHURCH WORLD SERVICE 28006 PHILLIPS STREET ELKHART IN 46515	N/A	501 (C) (3) FOR ASSISTANCE WITH RELIGION		
CITY OF POTTSVILLE/YORKVILLE HOSE WEST NORWEGIAN ST. POTTSVILLE PA 17901	N/A	MUNICIPALITY FOR ASSITANCE WITH FIRE FIGHTING		
CMON-GOLISANO CHILDREN'S MUSEUM 1508 LIVINGSTON RD. NAPLES FL 34109	N/A	501 (C) (3) PUBLIC CHARITY		
COLLIER COUNTY PUBLIC LIBRARY 2385 ORANGE BLOSSOM ROAD NAPLES FL 34109	N/A	501 (C) (3) FOR ASSISTANCE WITH EDUCATION		
COLORADO AGENCY FOR JEWISH CHARITIE 300 S. DAHLIA ST. DENVER CO 80246	N/A	FOR ASSISTANCE WITH RELIGION		
COMMUNITY FOUND OF COLLIER CTY 1100 IMMOKALEE ROAD NAPLES FL 34110	N/A	501 (C) (3) PUBLIC CHARITY		
CONSERVANCY OF SOUTHWEST FLORIDA 1450 MERRIHUE DR. NAPLES FL 34102	N/A	FOR ASSISTANCE WITH SCIENCE		
CONSUMER REPORTS FOUND. 101 TRUMAN AVE. YONKERS NY 10703	N/A	501 (C) (3) FOR ASSISTANCE WITH EDUCATION		
Total			▶ 3a	
b <i>Approved for future payment</i> N/A				
Total			▶ 3b	

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> CRIMSON TIDE FOOTBALL CLUB 2064 MAHANTONGO ST. POTTSVILLE PA 17901	N/A	501 (C) (3)	CHARITABLE	
CRIMSON TIDE FOUNDATION 410 LAUREL BLVD. POTTSVILLE PA 17901	N/A	501 (C) (3)	PUBLIC CHARITY	125
DA VINCI SCIENCE CENTER 3145 HAMILTON BLVD BYP ALLENTOWN PA 18103	N/A	501 (C) (3)	FOR ASSISTANCE WITH EDUCATION	
DAMON RUNYAN CANCER RESEARCH 55 BROADWAY NEW YORK NY 10006	N/A	501 (C) (3)	FOR ASSISTANCE WITH CANCER RESEARCH	
DEBRA OF AMERICA 16 E. 41ST ST. NEW YORK NY 10017	N/A		CHARITABLE	
DEMENTIA SOCIETY OF AMERICA PO BOX 600 DOYLESTOWN PA 18901	N/A	501 (C) (3)	FOR ASSISTANCE WITH RESEARCH	50
DIAKON COMMUNITY SERVICES 118 S. CENTRE ST., STE. 1 POTTSVILLE PA 17901	N/A		FOR ASSISTANCE WITH RESEARCH	
DOC WAYNE YOUTH SERVICES INC. 418 COMMONWEALTH AVE. BOSTON MA 02215	N/A	501 (C) (3)	PUBLIC CHARITY	
DOCTORS WITHOUT BORDERS HAGERSTOWN HAGERSTOWN MD 21741	N/A	501 (C) (3)	FOR ASSISTANCE WITH HEALTHCARE	
EAGLE FOUNDATION 45 WILDER STREET ORWIGSBURG PA 17961	N/A	501 (C) (3)	PUBLIC CHARITY	
Total			▶ 3a	
b <i>Approved for future payment</i> N/A				
Total			▶ 3b	

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i>				
ECO ENERGY FINANCE 2307 15TH ST. NW WASHINGTON DC 20009	N/A		CHARITABLE	
EDISON MUSEUM 2350 MCGREGOR BLVD FORT MEYERS FL 33901	N/A	501 (C) (3)	FOR ASSISTANCE WITH EDUCATION	
ELZA RETINA WELFARE ORGANIZATION 139 CHARLES ST. NO. 348 BOSTON MA 02114-3282	N/A	501 (C) (3)	CHARITABLE	
EVERGLADE CITY SCHOOL 415 SCHOOL DRIVE EVERGLADES CITY FL 34139	N/A	SCHOOL	FOR ASSISTANCE WITH EDUCATION	
FATHER WALTER CISZEK PRAYER LEAGUE 231 JARDIN ST. SHENANDOAH PA 17976	N/A		FOR ASSISTANCE WITH RELIGION	
FIRST CANDLE 2105 LAUREL BUSH RD. BEL AIR MD 21015	N/A		CHARITABLE	
FIRST UNITED CHURCH OF CHRIST 110 S. ROUTE 61 SOUTH SCHUYLKILL HAVEN PA 17972	N/A	CHURCH	FOR ASSISTANCE WITH RELIGION	
FIRST UNITED METHODIST CHURCH 223 PIKE STREET PORT CARBON PA 17965	N/A	CHURCH	FOR ASSISTANCE WITH RELIGION	
FRANCES HAZEL REID ELEMENTARY SCHOO 800 N. KING ST. LEESBURG VA 20176	N/A	SCHOOL	FOR ASSISTANCE WITH EDUCATION	
FRANKLIN & MARSHALL COLLEGE 415 HARRISBURG AVE. LANCASTER PA 17604	N/A	SCHOOL	FOR ASSISTANCE WITH EDUCATION	
Total			▶ 3a	
b <i>Approved for future payment</i>				
N/A				
Total			▶ 3b	

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year FRIENDSHIP HOSE COMPANY NO. 1 121 N. LIBERTY ST. ORWIGSBURG PA 17961	N/A		CHARITABLE	50
GABRIEL CHAMBER ENSEMBLE P.O. BOX 36 ORWIGSBURG PA 17961	N/A	501 (C) (3)	FOR ASSISTANCE WITH THE ARTS	200
GIRL SCOUTS OF THE NATION'S CAPITAL 4301 CONNECTICUT AVE. NW WASHINGTON DC 20008	N/A	501 (C) (3)	PUBLIC CHARITY	
GOLISAMO CHILDREN'S MUSEUM 15080 LIVINGSTON RD. NAPLES FL 34109	N/A	501 (C) (3)	FOR ASSISTANCE WITH EDUCATION	
GULFSHORE PLAYHOUSE 755 8TH AVE. SOUTH NAPLES FL 34108	N/A		FOR ASSISTANCE WITH THE ARTS	
HABITAT FOR HUMANITY PO BOX 1729 AMERICUS GA 31709	N/A	501 (C) (3)	FOR ASSISTANCE TO UNDER-PRIVILEGED	
HAWK MOUNTAIN SANCTUARY 1700 HAWK MOUNTAIN ROAD KEMPTON PA 19529	N/A	501 (C) (3)	FOR ASSISTANCE WITH WILDLIFE PRESERV	80
HELPS OUTREACH 2025 J&C BLVD. NAPLES FL 34109	N/A	501 (C) (3)	FOR ASSISTANCE TO THE NEEDY	120
HILLSIDE SPCA P.O. BOX 233 POTTSVILLE PA 17901	N/A	501 (C) (3)	FOR ASSISTANCE TO ANIMALS	1,050
HODGES UNIVERSITY 2655 NORTHBROOKE DR. NAPLES FL 34119	N/A	SCHOOL	FOR ASSISTANCE WITH EDUCATION	
Total			▶ 3a	
b Approved for future payment N/A				
Total			▶ 3b	

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
HOLOCAUST MUSEUM OF SW FLORIDA 4760 TAMiami TR N NAPLES FL 34103	N/A	501 (C) (3)	FOR ASSISTANCE WITH EDUCATION	
HOLY CROSS CHURCH 99 VALLEY ST. NEW PHILADELPHIA PA 17951	N/A	CHURCH	FOR ASSISTANCE WITH RELIGION	
HOPE HOSPICE C/O HOPE HEALTH 765 ATTUCKS LN HYANNIS MA 02610	N/A		CHARITABLE	
HOSPICE OF CENTRAL PENNSYLVANIA 1320 LINGLESTOWN RD. HARRISBURG PA 17110	N/A	501 (C) (3)	PUBLIC CHARITY	
HOSPICE OF THE GOLDEN ISLES 1692 GLENCO PARKWAY BRUNSWICK GA 31525	N/A	501 (C) (3)	PUBLIC CHARITY	
IMMACULATE CONCEPTION SCHOOL 1 WASHINGTON STREET NEWBURYPORT MA 01950	N/A	SCHOOL	FOR ASSISTANCE WITH EDUCATION	
INTERNATIONAL PLANNED PARENTHOOD 120 WALL STREET NEW YORK NY 10269	N/A	501 (C) (3)	FOR ASSISTANCE WITH EDUCATION	
JAMES & MARY EDITH RHOADES FOUND. P.O. BOX 485 POTTSVILLE PA 17901	N/A	501 (C) (3)	PUBLIC CHARITY	100
JANET EICH LIBRARY 111 PIKE STREET PORT CARBON PA 17965	N/A	501 (C) (3)	PUBLIC CHARITY	
JUVENILE DIABETES RESEARCH FOUND. 26 BROADWAY NEW YORK NY 10004	N/A	501 (C) (3)	FOR ASSISTANCE WITH DIABETES RESEARC	150
Total				▶ 3a
b Approved for future payment				
N/A				
Total				▶ 3b

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 Paid during the year				
KILMER MIDDLE SCHOOL DISTRICT 8100 WOLFTRAP RD. VIENNA VA 22182	N/A	SCHOOL	FOR ASSISTANCE WITH EDUCATION	
KNIGHTS OF COLUMBUS CHARITIES ARCH STREET POTTSVILLE PA 17901	N/A	501 (C) (3)	PUBLIC CHARITY	
LEAGUE OF WOMEN VOTERS ED FUND 1730 NORTH ST. NW WASHINGTON DC 20036	N/A	501 (C) (3)	FOR ASSISTANCE WITH EDUCATION	
LEHIGH VALLEY HEALTH NETWORK 420 S. JACKSON ST. POTTSVILLE PA 17901	N/A	HOSPITAL	FOR ASSISTANCE WITH HEALTH CARE	630
LEUKEMIA AND LYMPHOMA SOC PO BOX 4072 PITTSFIELD MA 01202	N/A	501 (C) (3)	FOR ASSISTANCE WITH LEUKEMIA RESEARC	
MAHANoy AREA HISTORICAL SOCIETY P.O. BOX 127 MAHANoy CITY PA 17948	N/A		FOR ASSISTANCE WITH EDUCATION	
MAHANoy CITY PUBLIC LIBRARY 17 WEST MAHANoy ST. MAHANoy CITY PA 17948	N/A	501 (C) (3)	FOR ASSISTANCE WITH EDUCATION/BOOKS	50
MAHANoy CITY VISITING NURSES ASSOC. 100 E. MARKET STREET MAHANoy CITY PA 17948	N/A	501 (C) (3)	PUBLIC CHARITY	
MAKE-A-WISH FOUNDATION 707 GRANT ST. 37TH FL. PITTSBURGH PA 15219-1938	N/A	501 (C) (3)	PUBLIC CHARITY	475
MARLIN HOSE COMPANY PO BOX 83 MARLIN PA 17951	N/A	MUNICIPALITY	FOR ASSISTANCE WITH FIRE FIGHTING	100
Total				▶ 3a
b Approved for future payment				
N/A				
Total				▶ 3b

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
MARTIN RICHARD FOUNDATION 1452 DORCHESTER AVE 4TH FL DORCHESTER MA 02122	N/A	501 (C) (3)	CHARITABLE	150
MATH COUNTS 400 ONE NORWEGIAN PLAZA POTTSVILLE PA 17901	N/A	501 (C) (3)	FOR ASSISTANCE WITH EDUCATION	
MEALS OF HOPE 2221 CORPORATION BLVD NAPLES FL 34109	N/A	501 (C) (3)	CHARITABLE	
MEMORIAL SLOAN KETTERING 1275 YORK AVE. NEW YORK NY 10065	N/A	HOSPITAL	FOR ASSISTANCE WITH SCIENCE	
MID PENN LEGAL SERVICES 315 N. CENTRE ST, STE 201 POTTSVILLE PA 17901	N/A	501 (C) (3)	PUBLIC CHARITY	
MINERSVILLE AREA FOOD DRIVE 529 LTYLE STREET MINERSVILLE PA 17954	N/A		FOR ASSISTANCE TO THE NEEDY	150
MINERSVILLE PUBLIC LIBRARY 220 S. FOURTH ST. MINERSVILLE PA 17954	N/A	501 (C) (3)	FOR ASSISTANCE WITH EDUCATION	50
MULICK SCHOLARSHIP FUND PO BOX 57 HEGINS PA 17938	N/A	501 (C) (3)	FOR ASSISTANCE WITH EDUCATION	
MUSCULAR DYSTROPHY ASSOC. 5940 HAMILTON BLVD. ALLENTOWN PA 18106	N/A	501 (C) (3)	FOR ASSISTANCE WITH RESEARCH	
N. BERKS/S. SCHUYLKILL HIST. SOC. PORT CLINTON PORT CLINTON PA 19549	N/A		FOR ASSISTANCE WITH EDUCATION	
Total			▶ 3a	
b Approved for future payment				
N/A				
Total			▶ 3b	

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
NAPLES BOTANICAL GARDENS 4820 BAYSHORE DRIVE NAPLES FL 34112	N/A	501 (C) (3) PUBLIC CHARITY	PUBLIC CHARITY	110
NAPLES COUNCIL ON WORLD AFFAIRS 12290 TREELINE AVE. FORT MYERS FL 33913	N/A	501 (C) (3) FOR ASSISTANCE WITH EDUCATION	FOR ASSISTANCE WITH EDUCATION	
NAPLES MUSEUM OF ART 5833 PELICAN BAY BLVD. NAPLES FL 34108	N/A	501 (C) (3) FOR ASSISTANCE TO THE ARTS	FOR ASSISTANCE TO THE ARTS	
NATIONAL AQUARIUM OF BALTIMORE 501 E. PRATT ST. BALTIMORE MD 21202	N/A	501 (C) (3) FOR ASSISTANCE WITH EDUCATION	FOR ASSISTANCE WITH EDUCATION	
NATIONAL COUNCIL OF WORLD AFFAIRS 12290 TREELINE AVE. FT. MYERS FL 33913	N/A	501 (C) (3) PUBLIC CHARITY	PUBLIC CHARITY	225
NATIONAL WHEELCHAIR BASKETBALL ASSO 1130 ELKTON STREET COLORADO SPRINGS CO 80907	N/A	501 (C) (3) FOR ASSISTANCE TO HANDICAPPED	FOR ASSISTANCE TO HANDICAPPED	
NATIVITY BVM HIGH SCHOOL LAWTON HILL POTTSVILLE PA 17901	N/A	SCHOOL FOR ASSISTANCE WITH EDUCATION	SCHOOL FOR ASSISTANCE WITH EDUCATION	100
OHEB ZEDECK SISTERHOOD 2400 WEST END AVE. POTTSVILLE PA 17901	N/A	CHURCH FOR ASSISTANCE WITH RELIGION	CHURCH FOR ASSISTANCE WITH RELIGION	
OHEB ZEDECK SYNAGOGUE CENTER 2400 WEST END AVE. POTTSVILLE PA 17901	N/A	CHURCH FOR ASSISTANCE WITH RELIGION	CHURCH FOR ASSISTANCE WITH RELIGION	250
OLMSTED CENTER FOR SIGHT 1170 MAIN ST. BUFFALO NY 14209	N/A	501 (C) (3) PUBLIC CHARITY	PUBLIC CHARITY	
Total				▶ 3a
b Approved for future payment				
N/A				
Total				▶ 3b

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> ORWIGSBURG BOROUGH NORTH WARREN ST. ORWIGSBURG PA 17961	N/A FOR ASSISTANCE	501(C)(3) WITH AMBULANCE SERVIC		
ORWIGSBURG FREE PUBLIC LIBRARY 214 INDEPENDENCE ST. ORWIGSBURG PA 17961	N/A FOR ASSISTANCE	501(C)(3) WITH EDUCATION/BOOKS		250
OSHER LIFELONG LEARNING INSTITUTE 50 FAIRWOOD DR. STE. 100 ROCHESTER NY 14623	N/A FOR ASSISTANCE	SCHOOL WITH EDUCATION		
PAHS GIRLS SOFTBALL BOOSTERS 16TH ST. & ELK AVE. POTTSVILLE PA 17901	N/A FOR ASSISTANCE	WITH YOUTH ATHLETICS		
PARKINSON ASSOC. OF S.W. FLORIDA 1048 GOODLETTE RD. NAPLES FL 34102	N/A FOR ASSISTANCE	501(C)(3) WITH PARKINSON RESEAR		
PENN STATE DANCE MARATHON UNIVERSITY PARK UNIVERSITY PARK PA 16801	N/A	501(C)(3)	CHARITABLE	100
PENNSYLVANIA FOP ASSOCIATION 2949 NORTH FRONT STREET HARRISBURG PA 17110-1250	N/A	501(C)(3)	PUBLIC CHARITY	
PENNSYLVANIA HERITAGE FOUNDATION 400 NORTH STREET HARRISBURG PA 17120	N/A	501(C)(3) FOR ASSISTANCE	WITH EDUCATION	
PENNSYLVANIA STATE UNIVERSITY 201 OLD MAIN UNIVERSITY PARK PA 16802	N/A	SCHOOL FOR ASSISTANCE	WITH EDUCATION	
PEOPLE FOR THE AMERICAN WAY FOUND 2000 M ST NW WASHINGTON DC 20077	N/A	501(C)(3) FOR ASSISTANCE	WITH EDUCATION	
Total			▶ 3a	
b <i>Approved for future payment</i> N/A				
Total			▶ 3b	

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
PHILHARMONIC CTR FOR ARTS 5833 PELICAN BAY BLVD. NAPLES FL 34108	N/A	501(C)(3) FOR ASSISTANCE WITH ARTS		
PHOENIX FIRE COMPANY NO. 2 P.O. BOX 1245 POTTSVILLE PA 17901	N/A		FOR ASSISTANCE WITH FIREFIGHTING	
PLANNED PARENTHOOD FEDERATION OF AM PO BOX 97166 WASHINGTON DC 20077	N/A	501(C)(3)	FOR ASSISTANCE WITH EDUCATION	100
POTTSVILLE AREA LITTLE LEAGUE ASSOC 556 E. NORWEGIAN ST. POTTSVILLE PA 17901	N/A		YOUTH SPORTS FOR ASSISTANCE WITH YOUTH SPORTS	
POTTSVILLE BOYS SOCCER BOOSTERS 16TH ST. & ELK AVE. POTTSVILLE PA 17901	N/A		YOUTH SPORTS FOR ASSISTANCE WITH YOUTH SPORTS	420
POTTSVILLE CHAPTER OF HADASSAH 2400 WEST END AVENUE POTTSVILLE PA 17901	N/A	501(C)(3)	FOR ASSISTANCE WITH RELIGION	
POTTSVILLE CRIMSON TIDE WRESTLING POTTSVILLE POTTSVILLE PA 17901	N/A		CHARITABLE	100
POTTSVILLE FREE PUBLIC LIBRARY 215 W. MARKET ST. POTTSVILLE PA 17901	N/A	501(C)(3)	FOR ASSISTANCE WITH EDUCATION/BOOKS	3,550
POTTSVILLE MIDGET FOOTBALL LEAGUE POTTSVILLE POTTSVILLE PA 17901	N/A		FOR ASSISTANCE WITH YOUTH ATHLETICS	
POTTSVILLE MOTHERS FOOTBALL BOOSTER P.O. BOX 953 POTTSVILLE PA 17901	N/A	501(C)(3)	FOR ASSISTANCE WITH YOUTH SPORTS	
Total			▶ 3a	
b Approved for future payment				
N/A				
Total			▶ 3b	

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i> POTTSVILLE ROTARY CHARITIES POTTSVILLE POTTSVILLE PA 17901	N/A	501 (C) (3)	PUBLIC CHARITY	
POTTSVILLE TEENER BASEBALL LEAGUE 436 ADAMS STREET POTTSVILLE PA 17901	N/A	YOUTH SPORTS	FOR ASSISTANCE WITH YOUTH SPORTS	
POTTSVILLE VOLLEYBALL BOOSTERS CLUB POTTSVILLE POTTSVILLE PA 17901	N/A		CHARITABLE	135
PRINCETON CLUB OF SW FLORIDA PO BOX 112795 NAPLES FL 34108	N/A	501 (C) (3)	FOR ASSISTANCE WITH EDUCATION	
PRINCETON UNIVERSITY 1 NASSAU HALL PRINCETON NJ 08544	N/A	SCHOOL	FOR ASSISTANCE WITH EDUCATION	
PSP CAMP CADET C/O RIVERVIEW BANK POTTSVILLE PA 17901	N/A	501 (C) (3)	PUBLIC CHARITY	
READING HEALTH SYSTEM FOUNDATION 6TH AVE. & SPRUCE ST. WEST READING PA 19608	N/A	HOSPITAL	FOR ASSISTANCE WITH HEALTH CARE	
READING PUBLIC MUSEUM 500 MUSEUM ROAD READING PA 19611	N/A	501 (C) (3)	FOR ASSISTANCE WITH EDUCATION	
RENAISSANCE ACAD OF FL 8695 COLLEGE PARKWAY FORT MYERS FL 33919	N/A	SCHOOL	FOR ASSISTANCE WITH EDUCATION	
RIDE TO CONQUER CANCER 6024 RIDGE AVE. PHILADELPHIA PA 19128	N/A	501 (C) (3)	PUBLIC CHARITY	
Total			▶ 3a	
b <i>Approved for future payment</i> N/A				
Total			▶ 3b	

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year RUTH STEINERT SPCA 18 WERTZ DR. PINE GROVE PA 17963	N/A	501 (C) (3)	PUBLIC CHARITY	
SALVATION ARMY N. CENTRE STREET POTTSVILLE PA 17901	N/A	501 (C) (3)	PUBLIC CHARITY	
SCHUYLKILL ALLIANCE FOR HEALTHCARE ONE SOUTH SECOND STREET POTTSVILLE PA 17901	N/A	501 (C) (3)	FOR ASSISTANCE WITH HEALTH CARE	
SCHUYLKILL AREA COMMUNITY FOUNDATIO 216 SOUTH CENTRE STREET POTTSVILLE PA 17901	N/A	501 (C) (3)	PUBLIC CHARITY	100
SCHUYLKILL COUNTY COUNCIL FOR ARTS 1440 MAHANTONGO STREET POTTSVILLE PA 17901	N/A	501 (C) (3)	FOR ASSISTANCE WITH ARTS	
SCHUYLKILL COUNTY HISTORICAL SOCIET 305 N. CENTRE ST. POTTSVILLE PA 17901	N/A	501 (C) (3)	PUBLIC CHARITY	
SCHUYLKILL COUNTY YMCA 219 N. 12TH ST. POTTSVILLE PA 17901	N/A	501 (C) (3)	TO PROMOTE CHRISTIAN PRINCIPLES	
SCHUYLKILL EMS 320 N. 9TH ST. POTTSVILLE PA 17901	N/A	501 (C) (3)	CHARITABLE	200
SCHUYLKILL HEALTH CARE SOUTH JACKSON ST. POTTSVILLE PA 17901	N/A	501 (C) (3)	PUBLIC CHARITY	
SCHUYLKILL INTERMEDIATE UNIT 29 17 MAPLE AVE. MARLIN PA 17951	N/A	SCHOOL	FOR ASSISTANCE WITH EDUCATION	
Total			▶ 3a	
b Approved for future payment N/A				
Total			▶ 3b	

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year SCHUYLKILL MEDICAL CENTER SOUTH JACKSON ST. POTTSVILLE PA 17901	N/A	HOSPITAL	FOR ASSISTANCE WITH HEALTH CARE	
SCHUYLKILL UNITED WAY 9 NORTH CENTRE ST. POTTSVILLE PA 17901	N/A	501 (C) (3)	PUBLIC CHARITY	750
SCHUYLKILL WOM. IN CRISIS 368 S. CENTER ST. POTTSVILLE PA 17901	N/A	501 (C) (3)	FOR ASSISTANCE TO WOMEN	
SCHUYLKILL YMCA NORTH CENTRE STREET POTTSVILLE PA 17901	N/A	501 (C) (3)	PUBLIC CHARITY	230
SELTZER HOSE COMPANY PO BOX 4270 SELTZER PA 17974	N/A	MUNICIPALITY	FOR ASSISTANCE WITH FIRE FIGHTING	
SERVANTS TO ALL 4 S. CENTRE ST. POTTSVILLE PA 17901	N/A	501 (C) (3)	FOR ASSISTANCE TO THE NEEDY	100
SEXUAL ASSAULT RESOURCE COUNS CTR 17 WESTWOOD CENTRE POTTSVILLE PA 17901	N/A	501 (C) (3)	FOR ASSISTANCE TO VICTIMS	
SHELTER FOR ABUSED WOMEN & CHILDREN LAKEWOOD BOULEVARD NAPLES FL 34112	N/A	501 (C) (3)	FOR ASSISTANCE TO VICTIMS	
SHRINER'S CHILDREN'S HOSPITAL 3551 N. BROAD ST. PHILADELPHIA PA 19140	N/A	HOSPITAL	FOR ASSISTANCE WITH HEALTH CARE	
SJOGREN'S SYNDROME FOUNDATION 6707 DEMOCRACY BOULEVARD BETHESDA MD 20817	N/A	501 (C) (3)	FOR ASSISTANCE WITH EDUCATION	
Total			▶ 3a	
b Approved for future payment N/A				
Total			▶ 3b	

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 Paid during the year SOL LIPTON SCHOLARSHIP FOUNDATION 316 N. CENTRE ST. POTTSVILLE PA 17901	N/A	501 (C) (3)	FOR ASSISTANCE WITH EDUCATION	100
SOUTHERN POVERTY LAW CENTER 400 WASHINGTON AVE. MONTGOMERY AL 36104	N/A		FOR ASSISTANCE WITH EDUCATION	
SOVEREIGN MAJESTIC THEATRE NORTH CENTRE STREET POTTSVILLE PA 17901	N/A	501 (C) (3)	FOR ASSISTANCE WITH ARTS	
SPECIAL OLYMPICS GEORGIA 4000 DEKALB PARKWAY ATLANTA GA 30340	N/A	501 (C) (3)	FOR ASSISTANCE TO HANDICAPPED	
ST. JOHN THE BAPTIST CHURCH 10TH & MAHANTONGO STREETS POTTSVILLE PA 17901	N/A	CHURCH	FOR ASSISTANCE WITH RELIGION	100
ST. JOHN'S UCC CHURCH 236 MARKET STREET ORWIGSBURG PA 17961	N/A	CHURCH	FOR ASSISTANCE WITH RELIGION	
ST. JOSEPH CENTER 2075 W. NORWEGIAN STREET POTTSVILLE PA 17901	N/A	501 (C) (3)	FOR ASSISTANCE WITH EDUCATION	300
ST. JUDE'S CHILDREN'S HOSPITAL 262 DANNY THOMAS PLACE MEMPHIS TN 38105	N/A	HOSPITAL	FOR ASSISTANCE WITH HEALTH CARE	100
ST. KATHERINE'S CHURCH NAPLES NAPLES FL 34108	N/A	CHURCH	FOR ASSISTANCE WITH RELIGION	
ST. MARK'S UCC 30 POTTSVILLE STREET CRESSONA PA 17929	N/A	CHURCH	FOR ASSISTANCE WITH RELIGION	
Total			▶ 3a	
b Approved for future payment N/A				
Total			▶ 3b	

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year ST. NICHOLAS CHURCH SUNBURY STREET MINERSVILLE PA 17954	N/A	CHURCH FOR ASSISTANCE WITH	RELIGION	
ST. NICHOLAS SCHOOL MEMORIAL FUND 515 NORTH FRONT STREET MINERSVILLE PA 17954	N/A	SCHOOL FOR ASSISTANCE WITH	EDUCATION	
ST. PATRICK'S CHURCH 319 MAHANTONGO ST. POTTSVILLE PA 17901	N/A	CHURCH FOR ASSISTANCE WITH	RELIGION	
ST. RICHARD'S CHURCH BARNESVILLE BARNESVILLE PA 18214	N/A	CHURCH FOR ASSISTANCE WITH	RELIGION	
ST. STEPHEN'S MEMORIAL FUND 218 VALLEY STREET PORT CARBON PA 17965	N/A	CHURCH FOR ASSISTANCE WITH	RELIGION	50
SUSAN G. KORMAN FOR CURE 5005 LBJ FREEWAY DALLAS TX 75244	N/A	501 (C) (3) ASSISTANCE WITH	MEDICAL RESEARCH	
TEMPLE UNIVERSITY HOOTATHON NORTH BROAD STREET PHILADELPHIA PA 19122	N/A	SCHOOL FOR ASSISTANCE WITH	EDUCATION	
THE COMMUNITY MISSION 336 N. FRONT STREET MINERSVILLE PA 17954	N/A	501 (C) (3)	CHARITABLE	500
THE HILL SCHOOL 717 E. HIGH ST. POTTSVILLE PA 19464	N/A	SCHOOL FOR ASSISTANCE WITH	EDUCATION	
THE MAIN IDEA AT CAMP WALDEN 93 WALDEN DR. DENMARK ME 04022	N/A	501 (C) (3) FOR ASSISTANCE WITH	EDUCATION	
Total			▶ 3a	
b Approved for future payment N/A				
Total			▶ 3b	

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> THE TAUSSIG CANCER INS AT CLEVELAND 9500 EUCLID CLEVELAND OH 44195	N/A	501 (C) (3)	FOR ASSISTANCE WITH EDUCATION	
TRINITY LUTHERAN CHURCH 300 W. ARCH ST. POTTSVILLE PA 17901	N/A	CHURCH	FOR ASSISTANCE WITH RELIGION	
TRUSTEES OF PHILLIPS ACADEMY P.O. BOX 55557 BOSTON MA 02205	N/A	SCHOOL	FOR ASSISTANCE WITH EDUCATION	
TRUSTEES OF UNIV OF PENNSYLVANIA 3910 CHESTNUT STREET PHILADELPHIA PA 19194	N/A	SCHOOL	FOR ASSISTANCE WITH EDUCATION	
TRYALL FUND 641 LEXINGTON AVE. NEW YORK NY 10022	N/A	501 (C) (3)	FOR ASSISTANCE IN EDUCATION	
UNIVERSITY OF PENNSYLVANIA PHILADELPHIA PHILADELPHIA PA 19104	N/A	SCHOOL	FOR ASSISTANCE WITH EDUCATION	150
UNIVERSITY OF PITTSBURGH 4200 FIFTH AVENUE PITTSBURGH PA 15260	N/A	SCHOOL	FOR ASSISTANCE WITH EDUCATION	
UPPER SCHUYLKILL HIGH SCHOOL 4210 HOLLYWOOD BOULEVARD HAZLE TWP PA 18202	N/A	SCHOOL	FOR ASSISTANCE WITH EDUCATION	
WALK IN ART CENTER 100 S. COLUMBIA AVE. SCHUYLKILL HAVEN PA 17972	N/A	501 (C) (3)	FOR ASSISTANCE WITH ARTS	
WESTBRIAR PTA 1741 PINE VALLEY DRIVE VIENNA VA 22182	N/A		FOR ASSISTANCE WITH EDUCATION	
Total			▶ 3a	
b <i>Approved for future payment</i> N/A				
Total			▶ 3b	

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment.

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year WGPU PUBLIC TELEVISION 10501 FGPU BLVD. SOUTH FT. MYERS FL 33965		N/A	FOR ASSISTANCE WITH EDUCATION	
WOMEN IN SPORTS 244 5TH AVE. NEW YORK NY 10001	N/A	501 (C) (3)	PUBLIC CHARITY	
WVIA TV PUBLIC BROADCASTING 100 WVIA WAY PITTSTON PA 18640	N/A		FOR ASSISTANCE WITH EDUCATION	
YORKVILLE HOSE FIRE COMPANY 20TH & WEST NORWEGIAN STS POTTSVILLE PA 17901	N/A		FOR ASSISTANCE WITH FIRE FIGHTING	
Total			▶ 3a	
b Approved for future payment N/A				
Total			▶ 3b	

Federal Statements

Statement 1 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
MARSHALL, BOHORAD, THORNBURG, PRICE	\$ 730	\$	\$	\$
TOTAL	\$ 730	\$ 0	\$ 0	\$ 0

Statement 2 - Form 990-PF, Part I, Line 16c - Other Professional Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
MID PENN BANK - INVESTMENT FEES	\$ 1,211	\$	\$	\$
TOTAL	\$ 1,211	\$ 0	\$ 0	\$ 0

Statement 3 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
2018 FEDERAL EXCISE TAX	\$ 389	\$	\$	\$
FOREIGN INCOME TAX WITHHELD	87			
TOTAL	\$ 476	\$ 0	\$ 0	\$ 0

Statement 4 - Form 990-PF, Part I, Line 23 - Other Expenses

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
EXPENSES	\$	\$	\$	\$
BANK SERVICE CHARGES	48			
MISCELLANEOUS	67			
TOTAL	\$ 115	\$ 0	\$ 0	\$ 0

Federal Statements

Statement 5 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
WADDELL & REED WR ADVISOR FUNDS:				
SCIENCE AND TECHNOLOGY BOND	137	137	COST	
GOVERNMENT SECURITIES	100	100	COST	
SMALL CAP	13,772	14,801	COST	15,843
WILSHIRE GLOBAL ALLOCATION A	7,751	8,076	COST	7,695
IVY INTERNATIONAL CORE EQUITY	5,446	5,601	COST	6,641
IVY CORE EQUITY A	52,867	34,672	COST	34,030
IVY SCIENCE AND TECHNOLOGY A	10,314	12,152	COST	17,903
IVY BALANCED A	11,969	12,882	COST	12,689
IVY CORPORATE BOND A		22,183	COST	22,116
ADVISORS HIGH INCOME A	50,614	48,201	COST	43,648
ADVISORS CONTINENTAL INCOME A				
MID PENN BANK TRUST DEPT.				
FEDERATED FLOATING RATE STRAT INC		8,000	COST	7,975
FEDERATED STRATEGIC VALUE FD	5,000	5,000	COST	4,880
FEDERATED TOTAL RETURN BOND FD IS	15,000	28,000	COST	28,549
ISHARES CORE MSCI EMERGING MKTS	6,022	6,022	COST	5,376
PRINCIPAL PREFERRED SEC INST	3,500	3,500	COST	3,722
SPDR FINANCIAL SELECT SECTOR	5,438	5,438	COST	6,156
T. ROWE PRICE DIVIDEND GROWTH	6,500	6,500	COST	7,500
T. ROWE PRICE MID CAP GROWTH	5,000	5,000	COST	5,452
VANGUARD EMERGING MKTS STOCK INDEX	8,523	8,523	COST	8,442
VANGUARD HIGH DIVIDEND YIELD INDEX	10,000	10,000	COST	10,781
VANGUARD MID-CAP VALUE IND ADM	3,000	3,000	COST	3,124
VANGUARD SHORT-TERM CORP BD IDX AD	15,000	15,000	COST	15,179
VANGUARD SMALL-CAP VALUE INDEX FD	5,000	5,000	COST	5,125
VANGUARD STAR FUND	8,000	8,000	COST	7,942
VANGUARD TOTAL INTL STOCK INDEX FD	11,000	11,000	COST	10,877
VANGUARD TOTAL STOCK MKT IND FD	5,000	5,000	COST	5,708
TOTAL	\$ 264,953	\$ 291,788		\$ 297,353

Federal Statements

Statement 6 - Form 990-PF, Part XV, Line 2b - Application Format and Required Contents

Description

LETTER FORM, TO INCLUDE THE PURPOSE FOR WHICH THE FUNDS
WILL BE USED

Form 990-PF, Part XV, Line 2c - Submission Deadlines

Description

NONE

Form 990-PF, Part XV, Line 2d - Award Restrictions or Limitations

Description

NONE

Underdistribution and Excess Distributions for Part XIII

Form **990-PF**

2019

For calendar year 2019, or tax year beginning _____, ending _____

Name

**BEN D. SPAGOLIO CHARITABLE TRUST
C/O JAMES C. BOHORAD, TRUSTEE**

Employer Identification Number
13-7345617

Undistributed Income Carryovers

Form 990-PF, Part XIII

Tax Year	Prior Undistributed Income			Current Year Decreases	Next Year Carryover	
	Nontaxable or Previously Taxed	Taxable in 2019	Total per Year		Nontaxable or Previously Taxed	Taxable in 2020
Years prior						
20 15						
20 16						
20 17						
2018		13,752	13,752	13,752		
2019			14,293	423		13,870
Total Carryover to Next Year						13,870

* Carryover amount includes 4942(a) amounts

Excess Distribution Carryovers

Form 990-PF, Part XIII

Preceding Tax Year Excess Distributions	Current Year	Next Year
	Decreases	Carryover
2014		
2015		
2016		
2017		
2018		
Current Year Excess Distribution Generated (2019)		0
Total Carryover to Next Year		0