HOWARD

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Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

1912

OMB No 1545-0047

2019

Open to Public Inspection

For calendar year 2019 or tax year beginning , and ending

Name of foundation: HOWARD FAMILY CHARITABLE FOUNDATION

A Employer identification number: 20-8623940

Number and street (or P O box number if mail is not delivered to street address): P.O. BOX 2898 Room/suite:

B Telephone number (see instructions): 405-488-6208

City or town, state or province, country, and ZIP or foreign postal code: OKLAHOMA CITY OK 73101

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

04

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) ▶ $ 3,859,439

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).)

	Line	Description	(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	61,653	61,653		
	4	Dividends and interest from securities	62,699	62,699		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10 STMT 1	179,425			
	b	Gross sales price for all assets on line 6a 3,312,348				
	7	Capital gain net income (from Part IV, line 2)		1,325		
	8	Net short-term capital gain			0	
	9	Income modifications				
	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) STMT 2	155		155	
	12	**Total.** Add lines 1 through 11	303,932	125,677	155	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	0			
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule) STMT 3	2,540	1,270		1,270
	c	Other professional fees (attach schedule) STMT 4	6,300			6,300
	17	Interest				
	18	Taxes (attach schedule) (see instructions) STMT 5	2,221	2,221		
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (att sch) STMT 6	202	101		101
	24	**Total operating and administrative expenses.** Add lines 13 through 23	11,263	3,592	0	7,671
	25	Contributions, gifts, grants paid	255,750			255,750
	26	**Total expenses and disbursements.** Add lines 24 and 25	267,013	3,592	0	263,421
	27	Subtract line 26 from line 12:				
	a	**Excess of revenue over expenses and disbursements**	36,919			
	b	**Net investment income** (if negative, enter -0-)		122,085		
	c	**Adjusted net income** (if negative, enter -0-)			155	

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For Paperwork Reduction Act Notice, see instructions.

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Form **990-PF** (2019)

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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	7,983	7,998	7,998
	2	Savings and temporary cash investments			
	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)			
	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) SEE STATEMENT 7	3,584,534	3,615,012	3,851,441
	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)	3,592,517	3,623,010	3,859,439
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.**			
	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.			
	26	Capital stock, trust principal, or current funds	3,591,017	3,621,510	
	27	Paid-in or capital surplus, or land, bldg , and equipment fund			
	28	Retained earnings, accumulated income, endowment, or other funds	1,500	1,500	
	29	**Total net assets or fund balances** (see instructions)	3,592,517	3,623,010	
	30	**Total liabilities and net assets/fund balances** (see instructions)	3,592,517	3,623,010	

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)	1	3,592,517
2	Enter amount from Part I, line 27a	2	36,919
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	3,629,436
5	Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 8	5	6,426
6	Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 29	6	3,623,010

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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	MERRILL LYNCH #83V-02649			
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	1,325			1,325
b				
c				
d				
e				

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

	(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	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a				1,325
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** 1,325

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	253,488	3,696,976	0.068566
2017	241,673	3,930,834	0.061481
2016	219,127	3,920,579	0.055891
2015	283,982	4,270,392	0.066500
2014	196,406	5,755,632	0.034124

2 **Total** of line 1, column (d)	2	0.286562
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	0.057312
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	3,553,648
5 Multiply line 4 by line 3	5	203,667
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,221
7 Add lines 5 and 6	7	204,888
8 Enter qualifying distributions from Part XII, line 4	8	263,421

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	1,221
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	1,221
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	1,221
6	Credits/Payments				
a	2019 estimated tax payments and 2018 overpayment credited to 2019	6a	435		
b	Exempt foreign organizations – tax withheld at source	6b			
c	Tax paid with application for extension of time to file (Form 8868)	6c	1,500		
d	Backup withholding erroneously withheld	6d			
7	Total credits and payments Add lines 6a through 6d			7	1,935
8	Enter any **penalty** for underpayment of estimated tax. Check here ☒ if Form 2220 is attached			8	24
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	690
11	Enter the amount of line 10 to be: **Credited to 2020 estimated tax** ▶ 690 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?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition	1b		X
	If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
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? If "Yes," attach a detailed description of the activities	2		X
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year? N/A	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by *General Instruction T.*	5		X
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either. • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X	
7	Did the foundation have at least $5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	7	X	
8a	Enter the states to which the foundation reports or with which it is registered See instructions ▶ OK			
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*? If "No," attach explanation	8b	X	
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 2019 or the tax year beginning in 2019? See instructions for Part XIV If "Yes," complete Part XIV	9		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

Part VII-A Statements Regarding Activities *(continued)*

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule See instructions	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement See instructions	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ N/A

14 The books are in care of ▶ CHRIS FLEMING Telephone no ▶ 405-488-6208
PO BOX 2898
Located at ▶ OKLAHOMA CITY OK ZIP+4 ▶ 73101

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

			Yes	No
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?	16		X
	See the instructions for exceptions and filing requirements for FinCEN Form 114 If "Yes," enter the name of the foreign country ▶			

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

	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			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	N/A	1b		
	Organizations relying on a current notice regarding disaster assistance, check here	▶ ☐			
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	1c		
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	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ 20 , 20 , 20 , 20				
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 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	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a		X
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?		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))? ☐ 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 N/A	5b		
	Organizations relying on a current notice regarding disaster assistance, check here ▶ ☐			
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? N/A ☐ Yes ☐ No			
	If "Yes," attach the statement required by Regulations section 53 4945–5(d)			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	6b		X
	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			
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? ☐ Yes ☒ 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
ROBERT E. HOWARD II PO BOX 61250	OKLAHOMA CITY OK 73146	PRESIDENT 1.00	0	0	0
VICKI P. HOWARD PO BOX 61250	OKLAHOMA CITY OK 73146	VP/SECRETARY 1.00	0	0	0
MICKEY CLAGG PO BOX 61250	OKLAHOMA CITY OK 73146	VICE PRESIDE 1.00	0	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	
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	3,599,773
b	Average of monthly cash balances	1b	7,991
c	Fair market value of all other assets (see instructions)	1c	0
d	**Total** (add lines 1a, b, and c)	1d	3,607,764
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	3,607,764
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	54,116
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	3,553,648
6	**Minimum investment return.** Enter 5% of line 5	6	177,682

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	177,682
2a	Tax on investment income for 2019 from Part VI, line 5	2a	1,221		
b	Income tax for 2019 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	1,221
3	Distributable amount before adjustments Subtract line 2c from line 1			3	176,461
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	176,461
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	176,461

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	263,421
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	263,421
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	1,221
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	262,200

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					176,461
2 Undistributed income, if any, as of the end of 2019:					
a Enter amount for 2018 only				74,124	
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: ▶ $ 263,421					
a Applied to 2018, but not more than line 2a				74,124	
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					176,461
e Remaining amount distributed out of corpus		12,836			
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		12,836			
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					0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required—see instructions)					
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		12,836			
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	12,836				

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:

MICKEY CLAGG 405-488-6208
PO BOX 61250 OKLAHOMA CITY OK 73146

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

WRITTEN OR VERBAL REQUESTS ARE ACCEPTED IN ANY FORMAT.

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

SEE STATEMENT 9

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				
BOYS AND GIRLS CLUB OF OK COUNTY 3535 N WESTERN AVE. OKLAHOMA CITY OK 73118	NONE	PC	COMMUNITY SERVICE	25,000
CENTRAL OK HUMANE SOCIETY 7500 N. WESTERN AVENUE OKLAHOMA CITY OK 73116	NONE	PC	COMMUNITY SERVICE	6,500
A CHANCE TO CHANGE 2113 W BRITTON ROAD THE VILLAGE OK 73120	NONE	PC	COMMUNITY SERVICE	2,500
CHICAGO LITERACY ALLIANCE 641 W. LAKE STREET CHICAGO IL 60661	NONE	PC	COMMUNITY SERVICE	500
DEAN MCGEE EYE INSTITUTE 608 STANTON L. YOUNG BLVD OKLAHOMA CITY OK 73104	NONE	PC	COMMUNITY SERVICE	500
FIRST 200 BEDFORD STREET MANCHESTER NH 03101	NONE	PC	COMMUNITY SERVICE	7,500
GENESIS PROJECT 9500 NW 150TH STREET JONES OK 73049	NONE	PC	COMMUNITY SERVICE	20,000
GIRLS SCOUTS OF WESTERN OKLAHOMA 6100 N ROBINSON AVENUE OKLAHOMA CITY OK 73118	NONE	PC	COMMUNITY SERVICE	25,500
HEARTS FOR HEARING 11500 N PORTLAND AVE. OKLAHOMA CITY OK 73120	NONE	PC	COMMUNITY SERVICE	2,500
HOMELESS ALLIANCE 1724 NW 4TH STREET OKLAHOMA CITY OK 73106	NONE	PC	COMMUNITY SERVICE	2,000
Total			▶ 3a	255,750
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*				
HOPE IS ALIVE 3009 BROOKHOLLOW ROAD OKLAHOMA CITY OK 73120	NONE	PC	COMMUNITY SERVICE	10,000
IMPACT OKLAHOMA PO BOX 20149 OKLAHOMA CITY OK 73156	NONE	PC	COMMUNITY SERVICE	2,000
INFANT CRISIS CENTER 4224 N LINCOLN BLVD. OKLAHOMA CITY OK 73105	NONE	PC	COMMUNITY SERVICE	7,500
KIPP OKC PUBLIC SCHOOLS PO BOX 776 OKLAHOMA CITY OK 73101	NONE	PC	COMMUNITY SERVICE	35,000
MOORE PUBLIC SCHOOLS 1500 SE 4TH STREET MOORE OK 73160	NONE	PC	COMMUNITY SERVICE	4,500
MYRIAD GARDEN FOUNDATION 301 W RENO AVENUE OKLAHOMA CITY OK 73102	NONE	PC	COMMUNITY SERVICE	1,000
OKLAHOMA CONTEMPORARY ARTS CENTER 3000 GENERAL PERSHING BLV OKLAHOMA CITY OK 73107	NONE	PC	COMMUNITY SERVICE	20,000
OKLAHOMA CITY NATIONAL MEMORIAL 620 N HARVEY AVENUE OKLAHOMA CITY OK 73102	NONE	PC	COMMUNITY SERVICE	500
OUR SISTERS' CLOSET 2209 SW 74TH STREET OKLAHOMA CITY OK 73159	NONE	PC	COMMUNITY SERVICE	1,500
PAYNE EDUCATION CENTER 10404 VINEYARD BLVD. OKLAHOMA CITY OK 73120	NONE	PC	COMMUNITY SERVICE	1,000
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				
PELLOW OUTREACH 6904 BRIARCREEK DRIVE OKLAHOMA CITY OK 73162	NONE	PC	COMMUNITY SERVICE	20,750
REGIONAL FOOD BANK FOUNDATION PO BOX 270968 OKLAHOMA CITY OK 73137	NONE	PC	COMMUNITY SERVICE	25,000
ST. LUKES UNITED METHODIST CHURCH 222 NW 15TH STREET OKLAHOMA CITY OK 73103	NONE	PC	COMMUNITY SERVICE	1,500
THE HUGS PROJECT 4449 NW 50TH STREET OKLAHOMA CITY OK 73112	NONE	PC	COMMUNITY SERVICE	1,500
TRANSFORMED BY CHRIST MINISTRIES 119 S BROADWAY EDMOND OK 73034	NONE	PC	COMMUNITY SERVICE	7,500
UNIVERSITY OF OK FOUNDATION 100 W TIMBERDELL ROAD NORMAN OK 73019	NONE	PC	COMMUNITY SERVICE	1,000
VETERENS FREEDOM RETREAT 7200 ROBERTSON RD FORT WORTH TX 76135	NONE	PC	COMMUNITY SERVICE	5,000
YMCA OF GREATER OKC 500 N BROADWAY SUITE 500 OKLAHOMA CITY OK 73102	NONE	PC	COMMUNITY SERVICE	10,500
YWCA USA 2460 W I-44 SERVICE ROAD OKLAHOMA CITY OK 73112	NONE	PC	COMMUNITY SERVICE	7,500
Total			▶ 3a	
b Approved for future payment N/A				
Total			▶ 3b	

HOWARD

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income (See instructions)
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	61,653	
4 Dividends and interest from securities			14	62,699	
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			14	179,425	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a					
b REIMBURSED INCOME					100
c OTHER INCOME					55
d					
e					
12 Subtotal Add columns (b), (d), and (e)		0		303,777	155

13 **Total.** Add line 12, columns (b), (d), and (e) 13 303,932

(See worksheet in line 13 instructions to verify calculations)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)
N/A	

DAA

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

			Yes	No
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?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of.			
	(1) Cash	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions.			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

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

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
N/A			

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
N/A		

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

May the IRS discuss this return with the preparer shown below? See instructions ☒ Yes ☐ No

Signature of officer or trustee: [signature] Date: 10/26/2020 Title: PRESIDENT

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed
MICHAEL L. RHODES	MICHAEL L. RHODES	10/21/20	
Firm's name ▶ BELL & RHODES, P.C.		PTIN	P00178135
Firm's address ▶ 14220 BARBOUR AVE OKLAHOMA CITY, OK 73134		Firm's EIN ▶	73-1275305
		Phone no	405-341-2863

Federal Statements

Statement 1 - Form 990-PF, Part I, Line 6a - Sale of Assets

Description / Whom Sold	Date Acquired	Date Sold	How Received / Sale Price	Cost	Expense	Depreciation	Net Gain / Loss
ML #83V-02649 SHORT TERM COVERED			PURCHASE				
	VARIOUS	VARIOUS	$ 1,922,751	$ 1,851,347	$	$	$ 71,404
ML #83V-02649 LONG TERM COVERED			PURCHASE				
	VARIOUS	VARIOUS	435,781	355,117			80,664
ML #83V-02650 SHORT TERM COVERED			PURCHASE				
	VARIOUS	VARIOUS	779,602	778,049			1,553
ML #83V-02650 LONG TERM COVERED			PURCHASE				
	VARIOUS	VARIOUS	118,489	97,351			21,138
ML #83V-03868 SHORT TERM COVERED			PURCHASE				
	VARIOUS	VARIOUS	43,152	42,379			773
ML #83V-03868 LONG TERM COVERED			PURCHASE				
	VARIOUS	VARIOUS	11,248	8,680			2,568
TOTAL			$ 3,311,023	$ 3,132,923	$ 0	$ 0	$ 178,100

Statement 2 - Form 990-PF, Part I, Line 11 - Other Income

Description	Revenue per Books	Net Investment Income	Adjusted Net Income
REIMBURSED INCOME	$ 100	$	$ 100
OTHER INCOME	55		55
TOTAL	$ 155	$ 0	$ 155

Federal Statements

Statement 3 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
ACCOUNTING	$ 2,540	$ 1,270	$	$ 1,270
TOTAL	$ 2,540	$ 1,270	$ 0	$ 1,270

Statement 4 - Form 990-PF, Part I, Line 16c - Other Professional Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
ADMINISTRATIVE FEES	$ 6,300	$	$	$ 6,300
TOTAL	$ 6,300	$ 0	$ 0	$ 6,300

Statement 5 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
EXCISE TAXES	$ 2,000	$ 2,000	$	$
FOREIGN TAXES	221	221		
TOTAL	$ 2,221	$ 2,221	$ 0	$ 0

Statement 6 - Form 990-PF, Part I, Line 23 - Other Expenses

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
	$	$	$	$
EXPENSES				
OFFICE SUPPLIES	202	101		101
TOTAL	$ 202	$ 101	$ 0	$ 101

Federal Statements

Statement 7 - Form 990-PF, Part II, Line 13 - Other Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
MERRILL LYNCH	$ 2,084,534	$ 2,115,012	COST	$ 2,351,441
ALLY JV	1,100,000	1,100,000	COST	1,100,000
ALLY MB	400,000	400,000	COST	400,000
TOTAL	$ 3,584,534	$ 3,615,012		$ 3,851,441

Federal Statements

Statement 8 - Form 990-PF, Part III, Line 5 - Other Decreases

Description	Amount
COST BASIS ADJUSTMENT	$ 6,426
TOTAL	$ 6,426

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

Description

WRITTEN OR VERBAL REQUESTS ARE ACCEPTED IN ANY FORMAT.

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

Description

NONE

Statement 9 - Form 990-PF, Part XV, Line 2d - Award Restrictions or Limitations

Description

AWARDS MAY BE GIVEN ONLY TO FURTHER THE FOLLOWING 2 PURPOSES:
1) MAKING OF GRANTS AND GIFTS TO PUBLIC CHARITIES, EDUCATIONAL INSTITUTIONS OF LEARNING, AND SCIENTIFIC RESEARCH AND INSTITUTIONS ENGAGED IN THE DISCOVERY, TREATMENT, AND CURE OF DISEASE AND CARE OF THE AFFLICTED; AND
2) MAKING OF GRANTS, GIFTS, AND LOANS TO PERSONS IN DISTRESS DUE TO ILLNESS, ACCIDENT, OR DISASTER WHO ARE SELECTED AS MERITORIOUS AND CAPABLE OF FURTHERING THE PURPOSES OF THE CORPORATION.

Form **990-PF**

Underdistribution and Excess Distributions for Part XIII

2019

For calendar year 2019, or tax year beginning , ending

Name:

HOWARD FAMILY CHARITABLE FOUNDATION

Employer Identification Number
20-8623940

Undistributed Income Carryovers

Form 990-PF, Part XIII

Tax Year	Prior Undistributed Income: Nontaxable or Previously Taxed	Prior Undistributed Income: Taxable in 2019	Prior Undistributed Income: Total per Year	Current Year Decreases	Next Year Carryover: Nontaxable or Previously Taxed	Next Year Carryover: Taxable in 2020
Years prior						
20 15						
20 16						
20 17						
2018		74,124	74,124	74,124		
2019			176,461	176,461		
Total Carryover to Next Year						0

* Carryover amount includes 4942(a) amounts

Excess Distribution Carryovers

Form 990-PF, Part XIII

Preceding Tax Year Excess Distributions	Current Year Decreases	Next Year Carryover
2014		
2015		
2016		
2017		
2018		
Current Year Excess Distribution Generated (2019)		12,836
Total Carryover to Next Year		12,836

Form **990PF**

Two Year Comparison Report

2018 & 2019

For calendar year 2019, or tax year beginning , ending

Name: HOWARD FAMILY CHARITABLE FOUNDATION

Taxpayer Identification Number: 20-8623940

Section	Line	No.	2018 Revenue and expenses per books	2018 Net investment income	2019 Revenue and expenses per books	2019 Net investment income	Differences Revenue and expenses per books	Differences Net investment income
Revenue	1. Contributions, gifts, grants, and similar amounts received	1.						
Revenue	2. Interest on savings and temporary cash investments	2.			61,653	61,653	61,653	61,653
Revenue	3. Dividends and interest from securities	3.	102,691	102,691	62,699	62,699	-39,992	-39,992
Revenue	4. Gross rents	4.						
Revenue	5. Net gain or (loss) from sale of assets	5.	50,860		179,425		128,565	
Revenue	6. Capital gain net income	6.		50,860		1,325		-49,535
Revenue	7. Gross profit or (loss)	7.						
Revenue	8. Other income	8.	2,199		155		-2,044	
Revenue	9. **Total.** Add lines 1 through 8	9.	155,750	153,551	303,932	125,677	148,182	-27,874
Expenses & Deductions	10. Compensation of officers, directors, trustees, etc	10.						
Expenses & Deductions	11. Other employee salaries and wages	11.						
Expenses & Deductions	12. Pension plans, employee benefits	12.						
Expenses & Deductions	13. Professional fees	13.	7,910	830	8,840	1,270	930	440
Expenses & Deductions	14. Interest	14.						
Expenses & Deductions	15. Taxes	15.	2,347	2,347	2,221	2,221	-126	-126
Expenses & Deductions	16. Depreciation and depletion	16.						
Expenses & Deductions	17. Occupancy	17.						
Expenses & Deductions	18. Other expenses	18.	366	8	202	101	-164	93
Expenses & Deductions	19. Contributions, gifts, grants paid	19.	247,554		255,750		8,196	
Expenses & Deductions	20. **Total expenses and disbursements.** Add lines 10 through 19	20.	258,177	3,185	267,013	3,592	8,836	407
Expenses & Deductions	21. **Net income (if negative investment activity, enter -0-)**	21.	-102,427	150,366	36,919	122,085	139,346	-28,281
Taxes	22. Excise Tax	22.		1,504		1,221		-283
Taxes	23. Section 511 Tax	23.						
Taxes	24. Subtitle A income tax	24.						
Taxes	25. **Total Taxes**	25.		1,504		1,221		-283
Due / Refund	26. Estimates and overpayments credited	26.				435		435
Due / Refund	27. Foreign tax withheld	27.						
Due / Refund	28. Other Payments	28.		2,000		1,500		-500
Due / Refund	29. **Total payments and credits**	29.		2,000		1,935		-65
Due / Refund	30. **Balance due / (Overpayment)**	30.		-496		-714		-218
Due / Refund	31. Overpayment credited to next year	31.		435		690		255
Due / Refund	32. Penalty	32.		61		24		-37
Due / Refund	33. **Net due / (Refund)**	33.		0		0		
Other	34. Total assets	34.	3,592,517		3,623,010		0	
Other	35. Total liabilities	35.	0		0		0	
Other	36. **Net assets**	36.	3,592,517		3,623,010		0	

HOWARD

Form **990PF**

Tax Return History

Use the 2Yr Report for more recent historical information

2019

Name: HOWARD FAMILY CHARITABLE FOUNDATION

Taxpayer Identification Number: 20-8623940

Section	Line	No.	2015 Revenue and expenses per books	2015 Net investment income	2016 Revenue and expenses per books	2016 Net investment income	2017 Revenue and expenses per books	2017 Net investment income
Revenue	1. Contributions, gifts, grants, and similar amounts received	1.						
	2. Interest on savings and temporary cash investments	2.						
	3. Dividends and interest from securities	3.					94,664	93,205
	4. Gross rents	4.						
	5. Net gain or (loss) from sale of assets	5.					157,529	
	6. Capital gain net income	6.						157,529
	7. Gross profit or (loss)	7.						
	8. Other income	8.						
	9. **Total.** Add lines 1 through 8	9.	0	0	0	0	252,193	250,734
Expenses & Deductions	10. Compensation of officers, directors, trustees, etc	10.						
	11. Other employee salaries and wages	11.						
	12. Pension plans, employee benefits	12.						
	13. Professional fees	13.					6,395	1,398
	14. Interest	14.						
	15. Taxes	15.					1,412	1,412
	16. Depreciation and depletion	16.						
	17. Occupancy	17.						
	18. Other expenses	18.					22,250	22,250
	19. Contributions, gifts, grants paid	19.			0		238,933	
	20. **Total expenses and disbursements.** Add lines 10 through 19	20.					268,990	25,060
	21. **Net income (if negative investment activity, enter -0-)**	21.	0	0	0	0	-16,797	225,674
Taxes	22. Excise Tax	22.						2,257
	23. Section 511 Tax	23.						
	24. Subtitle A income tax	24.						
	25. **Total Taxes**	25.						2,257
Due / Refund	26. Estimates and overpayments credited	26.						785
	27. Foreign tax withheld	27.						
	28. Other Payments	28.						
	29. **Total payments and credits**	29.						785
	30. **Balance due / (Overpayment)**	30.		0		0		1,472
	31. Overpayment credited to next year	31.						
	32. Penalty	32.						
	33. **Net due / (Refund)**	33.		0		0		1,472
Other	34. Total assets	34.	0		0		3,717,836	
	35. Total liabilities	35.	0		0		0	
	36. **Net assets**	36.	0		0		3,717,836	