

2949114207901

1912

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 , 2019, and ending , 20

Name of foundation LEROY AND MILDRED MCCURDY CHARITABLE TRUST

A Employer identification number 42-6468385

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

6729 AUGUSTINE CT (641) 777-1667

City or town, state or province, country, and ZIP or foreign postal code

JOHNSTON, IA 50131

G Check all that apply
☐ Initial return
☐ Final return
☐ Address change
☐ Initial return of a former public charity
☐ Amended return
☒ Name change

H Check type of organization:
☒ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust
☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 1,899,641
J Accounting method
☐ Cash
☒ Accrual
Other (specify) 04
(Part I, column (d) must be on cash basis)

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received (attach schedule)				
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
3 Interest on savings and temporary cash investments				
4 Dividends and interest from securities	77,992	77,992		
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	27,918			
b Gross sales price for all assets on line 6a	377,788			
7 Capital gain net income (from Part IV, line 2)		27,918		
8 Net short-term capital gain				
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)				
12 Total. Add lines 1 through 11	105,910	105,910	77,992	
13 Compensation of officers, directors, trustees, etc				
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees (attach schedule)				
b Accounting fees (attach schedule) STM108	1,380	1,380	1,380	
c Other professional fees (attach schedule)				
17 Interest				
18 Taxes (attach schedule) (see instructions) STM110	2,299	699	699	
19 Depreciation (attach schedule) and depletion				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses (attach schedule) STM103	18,302	18,302	18,302	
24 Total operating and administrative expenses. Add lines 13 through 23	21,981	20,381	20,381	0
25 Contributions, gifts, grants paid	91,337			92,205
26 Total expenses and disbursements. Add lines 24 and 25	113,318	20,381	20,381	92,205
27 Subtract line 26 from line 12				
a Excess of revenue over expenses and disbursements	(7,408)			
b Net investment income (if negative, enter -0-)		85,529		
c Adjusted net income (if negative, enter -0-)			57,611	

For Paperwork Reduction Act Notice, see instructions.

Form 990-PF (2019)

EEA

0423228901 MAY 18 2021
SCANNED NOV 03 2021

INTERNAL REVENUE SERVICE
RECEIVED
NOV 30 2020
CAMPUS 3000
LORENCE, KENTUCKY
MAIL UNIT #188

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 (a) Book Value	End of year (b) Book Value (c) Fair Market Value	
Assets	1 Cash - non-interest-bearing	1,422	2,086	2,086
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶ 2,651			
	Less allowance for doubtful accounts ▶	2,599	2,651	2,651
	4 Pledges receivable ▶			
	Less allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶			
	Less allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges		544	
	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 schedule) ▶				
12 Investments - mortgage loans				
13 Investments - other (attach schedule) STM118	1,703,537	1,693,800	1,894,616	
14 Land, buildings, and equipment basis ▶				
Less accumulated depreciation (attach schedule) ▶				
15 Other assets (describe ▶ STM120)		288	288	
16 Total assets (to be completed by all filers - see the instructions Also, see page 1, item I)	1,707,558	1,699,369	1,899,641	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable	92,205	91,337	
	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)	92,205	91,337		
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	1,615,353	1,608,032	
	27 Paid-in or capital surplus, or land, bldg, and equipment fund			
	28 Retained earnings, accumulated income, endowment, or other funds			
29 Total net assets or fund balances (see instructions)	1,615,353	1,608,032		
30 Total liabilities and net assets/fund balances (see instructions)	1,707,558	1,699,369		

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	1,615,353	
2 Enter amount from Part I, line 27a	2	(7,408)	
3 Other increases not included in line 2 (itemize) ▶ STM115	3	87	
4 Add lines 1, 2, and 3	4	1,608,032	
5 Decreases not included in line 2 (itemize) ▶	5		
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29	6	1,608,032	

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	ED JONES PUBL TRADED SECURITIES	P	03-12-2019	11-12-2019
b	ED JONES PUBL TRADED SECURITIES	P	09-17-2015	11-12-2019
c	ED JONES PUBL TRADED SECURITIES	P	09-12-2011	03-12-2019
d	ED JONES PUBL TRADED SECURITIES	P	03-10-2019	11-25-2019
e	ED JONES PUBL TRADED SECURITIES	P	03-17-2015	11-25-2019

(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 9,529		9,401	128
b 158,464		149,972	8,492
c 19,564		19,744	(180)
d 5,554		5,690	(136)
e 184,672		165,058	19,614

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			128
b			8,492
c			(180)
d			(136)
e			19,614

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	27,918
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	(8)

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.

(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	92,723	1,844,091	0.050281
2017	86,982	1,854,469	0.046904
2016	93,538	1,739,649	0.053768
2015	96,815	1,870,755	0.051752
2014	91,333	1,936,292	0.047169

2	Total of line 1, column (d)	2	0.249874
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	0.049975
4	Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	1,826,746
5	Multiply line 4 by line 3	5	91,292
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	855
7	Add lines 5 and 6	7	92,147
8	Enter qualifying distributions from Part XII, line 4 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	8	92,205

3

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 <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	855
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	855
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	855
6	Credits/Payments		
a	2019 estimated tax payments and 2018 overpayment credited to 2019	6a	544
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	544
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	311
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 <input type="checkbox"/> Refunded <input type="checkbox"/>	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?		x
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition. If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		x
c	Did the foundation file Form 1120-POL for this year?		x
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation <input type="checkbox"/> \$ _____ (2) On foundation managers <input type="checkbox"/> \$ _____		
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____		
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.		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		x
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?		x
b	If "Yes," has it filed a tax return on Form 990-T for this year?		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by <i>General Instruction T</i>		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?		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	x	
8a	Enter the states to which the foundation reports or with which it is registered. See instructions <input type="checkbox"/>		
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 <i>General Instruction G</i> ? If "No," attach explanation	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		x
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		x

2

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 ▶ LARRY MCCURDY Telephone no ▶ 641-777-1667		
Located at ▶ 6729 AUGUSTINE CT, JOHNSTON, IA ZIP+4 ▶ 50131		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here	▶ <input type="checkbox"/>	
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?	Yes	No
See the instructions for exceptions and filing requirements for FinCEN Form 114 If "Yes," enter the name of the foreign country ▶	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.

	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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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	1b	
Organizations relying on a current notice regarding disaster assistance, check here ▶ <input type="checkbox"/>		
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?	1c	X
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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
If "Yes," list the years ▶		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions)	2b	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)	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)

5a	During the year, did the foundation pay or incur any amount to		Yes	No
(1)	Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<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		5b	
	Organizations relying on a current notice regarding disaster assistance check here	<input type="checkbox"/>		
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?	<input type="checkbox"/> Yes <input type="checkbox"/> 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?	<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?		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?	<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?		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
JANICE ESPY P O BOX 820, FAIRFIELD, IA 52556	TRUSTEE 0.00	0	0	0
LARRY CARRIKER 1704 S PARK AVE, OSKALOOSA, IA 52577	TRUSTEE 0.00	0	0	0
LARRY MCCURDY 6729 AUGUSTINE CT, JOHNSTON, IA 50131	TRUSTEE 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 SEE PART XV FOR CONTRIBUTIONS PAID. CONTRIBUTIONS MADE ONLY TO NON PROFIT EDUCATIONAL AND CHARITABLE ORGANIZATIONS.

0

2

3

4

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2

Amount

1 N/A

0

2

All other program-related investments. See instructions

3

Total. Add lines 1 through 3

EEA

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	1,852,765
b	Average of monthly cash balances	1b	1,799
c	Fair market value of all other assets (see instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	1,854,564
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	1,854,564
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	27,818
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,826,746
6	Minimum investment return. Enter 5% of line 5	6	91,337

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	91,337
2a	Tax on investment income for 2019 from Part VI, line 5	2a	855
b	Income tax for 2019 (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	855
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	90,482
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	90,482
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	90,482

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	92,205
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	92,205
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	855
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	91,350

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				90,482
2 Undistributed income, if any, as of the end of 2019				
a Enter amount for 2018 only			91,149	
b Total for prior years				
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 ▶ \$ <u>92,205</u>				
a Applied to 2018, but not more than line 2a			91,149	
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				
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				90,482
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)

2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

Tax year	Prior 3 years				(e) Total
(a) 2019	(b) 2018	(c) 2017	(d) 2016		
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))

NONE

- 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

NONE

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

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

- c** Any submission deadlines

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

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				
MID AMERICAN NAZARENE COLLEGE 2030 E COLLEGE WAY OLATHE, KS 66062-1899	NONE	PC	GENERAL OP OF COLLEGE	18,441
WORLD GOSPEL MISSIONS PO BOX 948 MARION, IN 46952-0948	NONE	PC	MISSIONARY WORK	12,909
IOWA NAZARENE MISSIONARY SOCIETY 5701 W MUSTANG RD CEDAR RAPIDS, IA 52411	NONE	PC	MISSIONARY WORK	4,610
FREMONT UNITED METHODIST CHURCH PO BOX 18 FREMONT, IA 52561	NONE	PC	ADVANCED SPECIAL MISSION WORK	4,610
MAHASKA COUNTY OUTREACH 2367 HWY 92 OSKALOOSA, IA 52577-9626	NONE	PC	GENERAL OPERATIONS OF ITS OUTREACH PROGRAM	4,610
WHITE OAK CEMETERY ASSOC 2998 255TH ST OSKALOOSA, IA 52577	NONE	PC	CEMETERY UPKEEP	1,844
GIDEONS INTERNATIONAL PO BOX 140800 NASHVILLE, TN 37214-0800	NONE	PC	GENERAL OPERATIONS OF GIDEONS INTERNATIONAL	8,299
KENTUCKY MOUNTAIN BIBLE COLLEGE 855 HWY 541 JACKSON, KY 41339	NONE	PC	FOR SCHOLARSHIP FUND	9,221
Total				3a
b Approved for future payment				
MID AMERICAN NAZARENE COLLEGE 2030 E COLLEGE WAY OLATHE, KS 66062-1899	NONE	PC	GENERAL OP OF COLLEGE	18,267
WORLD GOSPEL MISSIONS PO BOX 948 MARION, IN 46952-0948	NONE	PC	MISSIONARY WORK	12,787
IOWA NAZARENE MISSIONARY SOCIETY PO BOX 402 TABOR, IA 51653	NONE	PC	MSSIONARY WORK	4,567
FREMONT UNITED METHODIST CHURCH PO BOX 18 FREMONT, IA 52561	NONE	PC	ADVANCED SPECIAL MISSION WORK	4,567
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				
FREMONT AMBULANCE LTD 223 SOUTH MILES ST FREMONT, IA 52561	NONE	PC	GENERAL OP OF THE RESCUE UNIT	1,844
MAHASKA COUNTY HISTORICAL SOCIETY PO BOX 578 OSKALOOSA, IA 52577	NONE	PC	GENERAL OP OF MUSEUM	1,844
IOWA STATE HOLINESS ASSOCIATION 3981 ADDISON AVENUE RICEVILLE, IA 50466	NONE	PC	GENERAL OP OF CAMP MEETINGS	1,844
IOWA WESLEYAN COLLEGE 601 N MAIN ST MOUNT PLEASANT, IA 52641	NONE	PC	GENERAL OP OF THE COLLEGE	18,441
AMERICAN BIBLE SOCIETY 101 N INDEPENDENCE MALL EAST FLOOR PHILADELPHIA, PA 19106-2155	NONE	PC	GENERAL OP OF AM BIBLE SOCIETY	3,688
Total			3a	
b Approved for future payment				
MAHASKA COUNTY OUTREACH 2367 HWY 92 OSKALOOSA, IA 52577-9626	NONE	PC	GENERAL OPERATIONS OF ITS OUTREACH PROGRAM	4,567
WHITE OAK CEMETERY ASSOC 2725 TELLER AVE CEDAR, IA 52543	NONE	PC	CEMETERY UPKEEP	1,827
GIDEONS INTERNATIONAL PO BOX 140800 NASHVILLE, TN 37214-0800	NONE	PC	GENERAL OPERATIONS OF GIDEONS INTERNATIONAL	8,220
KENTUCKY MOUNTAIN BIBLE COLLEGE PO BOX 10 VANCLEVE, KY 41385	NONE	PC	FOR SCHOLARSHIP FUND	9,134
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				
Total			3a	
b Approved for future payment				
FREMONT AMBULANCE LTD PO BOX 192 FREMONT, IA 52561	NONE	PC	GENERAL OP OF THE RESCUE UNIT	1,827
MAHASKA COUNTY HISTORICAL SOCIETY PO BOX 578 OSKALOOSA, IA 52577	NONE	PC	GENERAL OP OF MUSEUM	1,827
IOWA STATE HOLINESS ASSOCIATION 3981 ADDISON AVENUE RICEVILLE, IA 50466	NONE	PC	GENERAL OP OF CAMP MEETINGS	1,827
IOWA WESLEYAN COLLEGE 601 N MAIN ST MOUNT PLEASANT, IA 52641	NONE	PC	GENERAL OP OF THE COLLEGE	18,267
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				
Total			3a	92,205
b Approved for future payment AMERICAN BIBLE SOCIETY 1865 BROADWAY NEW YORK, NY 10023-7505	NONE	PC	GENERAL OP OF AM BIBLE SOCIETY	3,653
Total			3b	91,337

Federal Supporting Statements

2019 PG01

Name(s) as shown on return

Tax ID Number

W LEROY AND MILDRED MCCURDY CHARITABLE TRUST

42-6468385

FORM 990PF - PART III - LINE 3 OTHER INCREASES SCHEDULE

STATEMENT #115

NON DIVIDEND DISTRIBUTION	87
TOTAL	87

FORM 990PF - PART II - LINE 13 INVESTMENTS: OTHER SCHEDULE

PG01

STATEMENT #118

<u>CATEGORY</u>	<u>BOOK VALUE (BOY)</u>	<u>BOOK VALUE (EOY)</u>	<u>FMV (EOY)</u>
EDWARD JONES MUTUAL FDS	1,703,537	1,693,800	1,894,616
TOTAL	1,703,537	1,693,800	1,894,616

FORM 990PF - PART II - LINE 15 OTHER ASSETS SCHEDULE

PG01

STATEMENT #120

<u>DESCRIPTION</u>	<u>BOY BOOK</u>	<u>EOY BOOK</u>	<u>FMV</u>
MISC RECEIVABLES		288	288
TOTAL		288	288

Federal Supporting Statements

2019 PG01

Tax ID Number

42-6468385

Name(s) as shown on return

W LEROY AND MILDRED MCCURDY CHARITABLE TRUST

STATEMENT #103~

FORM 990PF - PART I - LINE 23 - OTHER EXPENSES SCHEDULE

DESCRIPTION	REVENUE AND EXPENSES	NET INVESTMENT	ADJUSTED NET INCOME	CHARITABLE PURPOSE
INVEST FEES MUT FUNDS	18,302	18,302	18,302	0
TOTALS	18,302	18,302	18,302	0

PG01

STATEMENT #108~

FORM 990PF - PART I - LINE 16(B) - ACCOUNTING FEES SCHEDULE

DESCRIPTION	REVENUE AND EXPENSES	NET INVESTMENT	ADJUSTED NET INCOME	CHARITABLE PURPOSE
HUNT AND ASSOC TAX PREP	1,380	1,380	1,380	0
TOTALS	1,380	1,380	1,380	0

Federal Supporting Statements

2019 PG01

Tax ID Number

42-6468385

Name(s) as shown on return

W LEROY AND MILDRED MCCURDY CHARITABLE TRUST

FORM 990PF - PART I - LINE 18 - TAXES SCHEDULE

STATEMENT #110~

DESCRIPTION	REVENUE AND EXPENSES	NET INVESTMENT	ADJUSTED NET INCOME	CHARITABLE PURPOSE
FOREIGN TAXES PAID	699	699	699	0
FED EXCISE TAX PAID	1,600	0	0	0
TOTALS	2,299	699	699	0