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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

OMB No 1545-0047

2019

Open to Public Inspection

For calendar year 2019 or tax year beginning , and ending

Name of foundation		A Employer identification number
MORGAN FAMILY LEGACY FOUNDATION		47-5638410
Number and street (or P O box number if mail is not delivered to street address) 11709 ROE AVE., SUITE D138	Room/suite	B Telephone number 913-851-8385
City or town, state or province, country, and ZIP or foreign postal code LEAWOOD, KS 66211		C If exemption application is pending, check here ▶ ☐

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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: [X] Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

03/04 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) ▶$ 6,121,370.

J Accounting method: [X] 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))	(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	2,000.		N/A	
2 Check ▶ [X] if the foundation is not required to attach Sch B				
3 Interest on savings and temporary cash investments	3,333.	3,333.		STATEMENT 1
4 Dividends and interest from securities	198,645.	198,645.		STATEMENT 2
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	19,596.			
b Gross sales price for all assets on line 6a 534,841.				
7 Capital gain net income (from Part IV, line 2)		19,596.		
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)				
11 Other income				
12 **Total** Add lines 1 through 11	223,574.	221,574.		
13 Compensation of officers directors, trustees, etc	12,000.	12,000.		0.
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees				
b Accounting fees STMT 3	4,535.	4,535.		0.
c Other professional fees STMT 4	31,635.	31,635.		0.
17 Interest				
18 Taxes STMT 5	2,395.	2,395.		0.
19 Depreciation and depletion				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses STMT 6	312.	312.		0.
24 **Total operating and administrative expenses** Add lines 13 through 23	50,877.	50,877.		0.
25 Contributions, gifts, grants paid	287,000.			287,000.
26 **Total expenses and disbursements** Add lines 24 and 25	337,877.	50,877.		287,000.
27 Subtract line 26 from line 12				
a Excess of revenue over expenses and disbursements	<114,303.>			
b **Net investment income** (if negative, enter -0-)		170,697.		
c **Adjusted net income** (if negative, enter -0-)			N/A	

Revenue

Operating and Administrative Expenses

SCANNED AUG 2 4 2020

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Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	167,214.	142,135.	142,135.
	2 Savings and temporary cash investments	25,050.	43,967.	43,967.
	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			
	7 Other notes and loans receivable ▶			
	Less allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations STMT 8	52,700.	52,756.	54,166.
	b Investments - corporate stock STMT 9	1,362,753.	1,377,747.	2,325,982.
	c Investments - corporate bonds STMT 10	71,984.	74,578.	76,872.
	11 Investments land buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 11	3,255,209.	3,131,157.	3,478,120.
	14 Land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	15 Other assets (describe ▶ DIVIDENDS DUE)	1,861.	128.	128.
	16 **Total assets** (to be completed by all filers - see the instructions Also, see page 1, item I)	4,936,771.	4,822,468.	6,121,370.
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			
	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	0.	0.	
	27 Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.	
	28 Retained earnings, accumulated income, endowment, or other funds	4,936,771.	4,822,468.	
	29 **Total net assets or fund balances**	4,936,771.	4,822,468.	
	30 **Total liabilities and net assets/fund balances**	4,936,771.	4,822,468.	

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	4,936,771.
2	Enter amount from Part I, line 27a	2	<114,303.>
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	4,822,468.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29	6	4,822,468.

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				
b	SEE ATTACHED STATEMENTS			
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				
b				
c				
d				
e	534,841.		515,245.	19,596.

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				
b				
c				
d				
e				19,596.

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 19,596.

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)
If (loss), enter -0- in Part I, line 8 } 3 N/A

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	312,958.	5,956,539.	.052540
2017	350,272.	6,132,788.	.057115
2016	0.	3,697,350.	.000000
2015	0.	0.	.000000
2014			

2 Total of line 1, column (d)	2	.109655
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	.027414
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	6,005,968.
5 Multiply line 4 by line 3	5	164,648.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,707.
7 Add lines 5 and 6	7	166,355.
8 Enter qualifying distributions from Part XII, line 4	8	287,000.

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

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 ▶ [ ] 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 ▶ [X] and enter 1% of Part I, line 27b	1	1,707.
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	1,707.
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	1,707.
6	Credits/Payments		
a	2019 estimated tax payments and 2018 overpayment credited to 2019 — 6a: 3,258.		
b	Exempt foreign organizations - tax withheld at source — 6b: 0.		
c	Tax paid with application for extension of time to file (Form 8868) — 6c: 0.		
d	Backup withholding erroneously withheld — 6d: 0.		
7	Total credits and payments. Add lines 6a through 6d	7	3,258.
8	Enter any **penalty** for underpayment of estimated tax Check here [X] if Form 2220 is attached	8	0.
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	1,551.
11	Enter the amount of line 10 to be: **Credited to 2020 estimated tax** ▶ 1,551. **Refunded** ▶	11	0.

Part VII-A Statements Regarding Activities

		Line	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 ▶ $ 0. **(2)** On foundation managers ▶ $ 0.			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ 0.			
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 ▶ KS			
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 the 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

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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 ▶ AMANDA K. MORGAN Telephone no ▶913-851-8385

Located at ▶11709 ROE AVE., STE D138, LEAWOOD, KS ZIP+4 ▶66211

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 N/A

			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

			Yes	No
	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? STATEMENT 7 ☒ 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	1b		X
	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?	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? ☐ Yes ☒ 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) 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 ▶ ____, ____, ____, ____			
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.

(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
MICHAEL B. MORGAN 11709 ROE AVE., STE D138 LEAWOOD, KS 66211	DIRECTOR, CHAIRMAN & PRESI 1.00	0.	0.	0.
AMANDA K. MORGAN 11709 ROE AVE., STE D138 LEAWOOD, KS 66211	DIRECTOR, COO & SECRETARY 10.00	12,000.	0.	0.
BRIAN J. MORGAN 11709 ROE AVE., STE D138 LEAWOOD, KS 66211	DIRECTOR, CIO & TREASURER 1.00	0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). 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. 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 ▶ 0

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 - REFER TO PART XV - ALL OF THE FOUNDATION'S CHARITABLE ACTIVITIES ARE CASH CONTRIBUTIONS PAID DIRECTLY TO TAX EXEMPT CHARITABLE ORGANIZATIONS.	0.
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 N/A	
2	
All other program-related investments See instructions.	
3	
Total. Add lines 1 through 3 ▶	0.

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	5,797,512.
b	Average of monthly cash balances	1b	290,187.
c	Fair market value of all other assets	1c	9,730.
d	**Total** (add lines 1a, b, and c)	1d	6,097,429.
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	6,097,429.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	91,461.
5	**Net value of noncharitable-use assets** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	6,005,968.
6	**Minimum investment return** Enter 5% of line 5	6	300,298.

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	300,298.
2a	Tax on investment income for 2019 from Part VI, line 5	2a	1,707.		
b	Income tax for 2019. (This does not include the tax from Part VI.)	2b			
c	Add lines 2a and 2b			2c	1,707.
3	Distributable amount before adjustments Subtract line 2c from line 1			3	298,591.
4	Recoveries of amounts treated as qualifying distributions			4	0.
5	Add lines 3 and 4			5	298,591.
6	Deduction from distributable amount (see instructions)			6	0.
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1			7	298,591.

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	287,000.
b	Program-related investments - total from Part IX-B	1b	0.
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	287,000.
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	5	1,707.
6	**Adjusted qualifying distributions** Subtract line 5 from line 4	6	285,293.

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				298,591.
2 Undistributed income, if any, as of the end of 2019				
a Enter amount for 2018 only			274,886.	
b Total for prior years: ____, ____, ____		0.		
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	0.			
4 Qualifying distributions for 2019 from Part XII, line 4: ▶ $ 287,000.				
a Applied to 2018, but not more than line 2a			274,886.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2019 distributable amount				12,114.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount - see instructions		0.		
e Undistributed income for 2018. Subtract line 4a from line 2a Taxable amount - see instr.			0.	
f Undistributed income for 2019. Subtract lines 4d and 5 from line 1 This amount must be distributed in 2020				286,477.
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)	0.			
8 Excess distributions carryover from 2014 not applied on line 5 or line 7	0.			
9 **Excess distributions carryover to 2020** Subtract lines 7 and 8 from line 6a	0.			
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) N/A

1 a 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			
	(a) 2019	(b) 2018	(c) 2017	(d) 2016	(e) Total
2 a 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).)

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

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

SEE STATEMENT 12

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

STATEMENT 12

c Any submission deadlines:

STATEMENT 12

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

STATEMENT 12

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				
BARSTOW SCHOOL 11511 STATE LINE ROAD KANSAS CITY, MO 64114	N/A	TAX-EXEMPT CHARITY	AN INDEPENDENT K-12 SCHOOL THAT EMPHASIZES SYMMETRICAL DEVELOPMENT OF MIND, BODY AND CHARACTER	30,000.
THE TEMPLE, CONGREGATION B'NAI JEHUDAH 12320 NALL OVERLAND PARK, KS 66209	N/A	TAX-EXEMPT CHARITY	SUPPORT RELIGIOUS MISSION OF SYNAGOGUE	55,000.
CANCER LEAGUE OF COLORADO P O BOX 5373 DENVER, CO 80155	N/A	TAX-EXEMPT CHARITY	TO SECURE THE CURE OR CONTROL OF CANCER BY RAISING FUNDS TO SUPPORT INNOVATIVE CANCER RESEARCH AND	10,000.
CHILDREN'S MERCY HOSPITAL 2401 GILLHAM ROAD KANSAS CITY, MO 64108	N/A	TAX-EXEMPT CHARITY	PROVIDES PEDIATRIC MEDICAL CENTER THAT INTEGRATES CLINICAL CARE, RESEARCH AND MEDICAL EDUCATION	20,000.
COLORADO PHOTOGRAPHIC ARTS CENTER 1070 BANNOCK STREET DENVER, CO 80204	N/A	TAX-EXEMPT CHARITY	DEDICATED TO THE ART OF PHOTOGRAPHY, OFFERING CONTEMPORARY PHOTOGRAPHY EXHIBITIONS, CLASSES,	13,000.
Total SEE CONTINUATION SHEET(S)			▶ 3a	287,000.
b Approved for future payment NONE				
Total			▶ 3b	0.

923611 12-17-19 ** SEE PURPOSE OF GRANT CONTINUATIONS

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	Related or exempt function income
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	3,333.	
4 Dividends and interest from securities			14	198,645.	
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			18	19,596.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue					
a					
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)		0.		221,574.	0.

13 **Total** Add line 12, columns (b), (d), and (e) 13 221,574.

(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)
	N/A

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

▶ Amanda A Morgan — 3-26-2020 ▶ SECRETARY

Signature of officer or trustee — Date — Title

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

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
ROBERT J. O'HALLORAN	ROBERT J. O'HALLO	03/11/20		P00218447

Firm's name ▶ O'HALLORAN SHERMAN ASSOCIATES, LLC — Firm's EIN ▶ 20-2069908

Firm's address ▶ 4801 W. 110TH ST., SUITE 150 OVERLAND PARK, KS 66211 — Phone no (913)341-8500

923622 12-17-19

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
SECURITY TRUST AND INVESTMENTS	2,408.	2,408.	
SECURITY TRUST AND INVESTMENTS--AMORTIZATION OF BOND PREMIUM	<465.>	<465.>	
SECURITY TRUST AND INVESTMENTS--AMORTIZATION OF BOND PREMIUM-US TREASURY	<157.>	<157.>	
SECURITY TRUST AND INVESTMENTS--MARKET DISCOUNT	141.	141.	
SECURITY TRUST AND INVESTMENTS--US TREASURY	1,391.	1,391.	
TD AMERITRADE, INC	15.	15.	
TOTAL TO PART I, LINE 3	3,333.	3,333.	

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME
SECURITY BANK OF KANSAS CITY	111,301.	0.	111,301.	111,301.	
SECURITY TRUST AND INVESTMENTS	10,739.	2,867.	7,872.	7,872.	
TD AMERITRADE, INC	83,623.	4,151.	79,472.	79,472.	
TO PART I, LINE 4	205,663.	7,018.	198,645.	198,645.	

FORM 990-PF ACCOUNTING FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
O'HALLORAN SHERMAN ASSOCIATES, LLC - ACCOUNTING FOR ACTIVITY AND	0.	0.		0.
PREPARATION OF FORM 990-PF. ASSIST WITH COMPLIANCE OF PRIVATE FOUNDATION	0.	0.		0.

RULES AND REGULATIONS.	4,535.	4,535.		0.
TO FORM 990-PF, PG 1, LN 16B	4,535.	4,535.		0.

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT FEES-CREATIVE PLANNING INC	27,523.	27,523.		0.
INVESTMENT FEES-SECURITY TRUST AND INVESTMENTS	4,112.	4,112.		0.
TO FORM 990-PF, PG 1, LN 16C	31,635.	31,635.		0.

FORM 990-PF TAXES STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES ON INVESTMENT INCOME	2,355.	2,355.		0.
TAXES AND LICENSES-KANSAS ANNUAL REPORT	40.	40.		0.
TO FORM 990-PF, PG 1, LN 18	2,395.	2,395.		0.

FORM 990-PF OTHER EXPENSES STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
SUPPLIES/POST OFFICE BOX RENTAL	312.	312.		0.
TO FORM 990-PF, PG 1, LN 23	312.	312.		0.

FOOTNOTES STATEMENT 7

PART VII-B -- SELF DEALING (SECTION 4941) LINE 1A(4)

AMANDA MORGAN IS THE SECRETARY AND ONE OF THE DIRECTORS OF THE MORGAN FAMILY LEGACY FOUNDATION. SHE IS NOT ONE OF THE GRANTORS OF THE FOUNDATION. AMANDA ATTENDS NUMEROUS MEETINGS, PERFORMS ADMINISTRATIVE DUTIES AND PROVIDES INVESTMENT GUIDANCE FOR THE MORGAN FAMILY LEGACY FOUNDATION, INCLUDING TAKING MINUTES AT MEETINGS, RECEIVING AND PRESENTING CHARITABLE REQUESTS TO THE OTHER DIRECTORS/OFFICERS OF THE MORGAN FAMILY LEGACY FOUNDATION, RESPONDING TO THOSE REQUESTS, AND ANY OTHER TASKS THAT ARISE THROUGHOUT THE YEAR RELATED TO THE MORGAN FAMILY LEGACY FOUNDATION. THE FEES FOR HER SERVICES WERE BASED ON ACTUAL TIME SPENT PERFORMING THESE DUTIES AND WERE REASONABLE AND NOT EXCESSIVE.

FORM 990-PF U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS STATEMENT 8

DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
US TREASURY NOTE DTD 1/31/2018 2.75%	X		5,970.	6,397.
US TREASURY NTS DTD 10/31/2015 1.875%	X		6,988.	7,052.
US TREASURY NOTE DTD 8/15/2011 2.125%	X		11,983.	12,100.
US TREASURY NOTE 2.125%	X		10,738.	11,196.
US TREASURY NTS DTD 10/31/18 3.125%	X		2,062.	2,200.
US TREASURY NOTE 2.625%	X		4,063.	4,196.
US TREASURY NTS DTD 11/15/14 2.25%	X		2,963.	3,079.
US TREASURY NOTES DTD 6/21/18 2.5%	X		5,003.	5,021.
US TREASURY NTS DTD 7/31/19 1.625%	X		2,986.	2,925.
TOTAL U.S. GOVERNMENT OBLIGATIONS			52,756.	54,166.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			52,756.	54,166.

FORM 990-PF CORPORATE STOCK STATEMENT 9

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
35,536 SHS VALLEY VIEW BANCSHARES	1,151,366.	2,027,329.
455 SHS BERKSHIRE HATHAWAY INC	68,343.	103,057.
48 SHS AT & T	1,531.	1,876.
11 SHS AFFILIATED MANAGERS GROUP	2,224.	932.
6 SHS ALPHABET INC CL C	6,494.	8,022.
4 SHS AMAZON.COM INC	4,815.	7,391.
10 SHS AMERICAN TOWER CORP REIT	1,418.	2,298.
13 SHS AMERIPRISE FINANCIAL INC	2,200.	2,165.
43 SHS APPLE INC	7,400.	12,627.
11 SHS BERKSHIRE HATHAWAY INC CLASS B	2,201.	2,491.
2 SH BOOKING HLDGS INC	3,475.	4,107.
11 SHS BROADCOM INC	2,972.	3,476.
18 SHS CATERPILLAR INC	2,833.	2,658.
33 SHS CONOCOPHILLIPS	1,862.	2,146.
12 SHS COSTCO WHOLESALE GROUP	2,290.	3,527.
32 SHS DANAHER CORP	3,002.	4,911.
16 SHS DIGITAL REALTY TRUST	1,822.	1,916.
28 SHS DOMINION ENERGY INC	2,167.	2,319.
22 SHS ECOLAB INC	2,981.	4,246.
39 SHS EXXON MOBILE CORP	3,386.	2,721.

14 SHS FACEBOOK INC CL A	2,586.	2,874.
169 SHS FORD MOTOR CO	1,806.	1,572.
41 SHS FORTIVE CORP	2,970.	3,132.
52 SHS HALLIBURTON CO	2,635.	1,272.
28 SHS HESS CORP	1,386.	1,871.
16 SHS HOME DEPOT INC	3,030.	3,494.
41 SHS JP MORGAN	4,437.	5,715.
155 SHS KEY CORP	3,174.	3,137.
11 SHS MCDONALDS CORP	1,851.	2,174.
66 SHS MERCK & CO INC	3,731.	6,003.
65 SHS MICROSOFT CORP	6,048.	10,251.
5 SHS NETFLIX INC	1,703.	1,618.
8 SHS NORTHROP GRUMMAN CORP	2,455.	2,752.
23 SHS PNC FINANCIAL SERVICES GROUP INC	3,333.	3,671.
31 SHS PEPSICO INC	3,624.	4,237.
21 SHS PROCTOR & GAMBLE CO	1,536.	2,623.
12 SHS RAYTHEON CO	2,261.	2,637.
18 SHS SALESFORCE.COM INC	1,899.	2,928.
29 SHS STARBUCKS CORP	1,707.	2,550.
15 SHS THERMO FISHER SCIENTIFIC INC	2,948.	4,873.
20 SHS UNION PACIFIC CORP	2,731.	3,616.
9 SHS UNITED TECHNOLOGIES CORP	1,116.	1,348.
13 SHS UNITED HEALTH GROUP INC	2,908.	3,822.
65 SHS VERIZON COMMUNICATIONS INC	3,415.	3,991.
25 SHS VISA INC CL A	2,894.	4,698.
20 SHS WAL-MART INC	1,720.	2,377.
13 SHS ALLERGAN PLC	2,215.	2,485.
19 SHS EATON CORP PLC	1,553.	1,800.
33 SHS MEDTRONIC PLC	2,798.	3,744.
21 SHS CHUBB LIMITED	3,012.	3,269.
31 SHS TE CONNECTIVITY LTD	3,007.	2,971.
300 SHS SPDR WELLS FARGO PREFERRED STOCK	12,532.	13,203.
10 SHS ADOBE INC	2,690.	3,298.
1 SH ALPHABET INC CL A	1,126.	1,339.
56 SHS CISCO SYSTEMS INC	2,605.	2,686.
12 SHS WALT DISNEY CO	1,523.	1,736.
TOTAL TO FORM 990-PF, PART II, LINE 10B	1,377,747.	2,325,982.

FORM 990-PF — CORPORATE BONDS — STATEMENT 10

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
AON PLC SENIOR GLOBAL NOTE DTD 2/23/2016 3.875%	2,070.	2,153.
AT & T INC SR GLOBAL NT DTD 1/29/2016 3.6%	4,064.	4,175.
ALPHABET INC SENIOR GLOBAL NOTE DTD 8/02/2016 1.998%	2,859.	2,985.
AMERICAN INTERNATIONAL GROUP INC SR GLBL NT DTD 3/22/2016 3.9%	3,088.	3,222.
AMGEN INC SR GLBL NT DTD 5/22/2014 3.625%	4,116.	4,227.

APPLE INC GLOBAL NOTE DTD 5/3/2013 2.4%	3,953.	4,068.
BLACKROCK INC SR NT DTD 3/18/2014 3.5%	3,088.	3,192.
CITIGROUP INC SR GLBL NT 20 DTD 10/26/2015 2.65%	3,003.	3,016.
GOLDMAN SACHS GROUP INC MEDIUM TERM NOTE DTD 12/15/2010 6%	3,050.	3,053.
INTEL CORP SR NOTE DTD 12/11/2012 2.7%	3,018.	3,074.
JP MORGAN SENIOR NOTE DTD 9/24/2012 3.25%	3,044.	3,104.
LOWES COS INC SENIOR GLOBAL NOTE 3.1%	3,014.	3,102.
MORGAN STANLEY SENIOR NOTE DTD 7/28/2011 5.5%	3,159.	3,160.
ORACLE CORP SENIOR GLOBAL NOTE DTD 6/29/2016 2.65%	2,929.	3,069.
RIO TINTO FINANCE USA LTD SR GLBL NT DTD 6/16/2015 3.75%	3,105.	3,226.
SALESFORCE.COM INC SR NT DTD 4/5/2018 3.7%	2,982.	3,291.
WELLS FARGO CO DTD 9/28/2015 3.55%	4,085.	4,236.
AMERICAN EXPRESS CO SR GLBL NT DTD 10/23/17 3%	2,892.	3,102.
BANK OF AMERICA CORP FR 3.248%	3,923.	4,170.
CAPITAL ONE FINANCIAL CORP SR BD DTD 7/14/11 4.75%	3,072.	3,124.
CHEVRON CORP SENIOR GLOBAL NOTE DTD 5/9/16 2.1%	2,983.	3,019.
PAYPAL HOLDINGS INC SR GLBL NT DTD 9/26/19 2.85%	3,020.	3,028.
VNWARE INC SR GLBL NT DTD 8/6/17 2.95%	4,061.	4,076.
TOTAL TO FORM 990-PF, PART II, LINE 10C	74,578.	76,872.

FORM 990-PF OTHER INVESTMENTS STATEMENT 11

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
1597 SHS ISHARES CORE S & P 500ETF	COST	348,651.	516,214.
1855 SHS ISHARES CORE US AGGBD ET ETF	COST	201,509.	208,446.
5464 SHS ISHARES CORE MSCI EMKT ETF	COST	263,463.	293,745.
10351 SHS VANGUARD FTSE DEV MKT ETF	COST	405,253.	456,065.
1859 SHS VANGUARD INT-TERM CORP ETF	COST	162,493.	169,783.
819 SHS VANGUARD MID CAP ETF	COST	108,947.	145,929.
4017.095 SHS DFA US MICRO CAP FD	COST	80,215.	87,131.
4170.822 SHS DFA EMERGING MARKETS SMALL CAP INST	COST	87,406.	86,962.
4110.014 SHS LORD ABBETT SHORT DURATION INCOME 1	COST	17,509.	17,303.
385.403 SHS DFA EMERGING MARKETS CORE EQUITY	COST	8,637.	8,390.
473.834 SHS DFA INTERNATIONAL SMALL CAP VALUE I	COST	10,959.	9,169.
478.056 SHS DFA US SMALL CAP	COST	17,000.	16,746.
739.274 SHS MFS INTERNATIONAL VALUE R6	COST	32,000.	33,637.
217.456 SHS T ROWE PRICE MID-CAP GROWTH I	COST	20,000.	20,726.

150 SHS SCHWAB US LARGE CAP GROWTH ETF	COST	11,051.	13,937.
500 SHS SCHWAB US LARGE CAP VALUE ETF	COST	27,072.	30,060.
1249 SHS ISHARES TRUST EAFE SM CP ETF	COST	64,236.	77,788.
328 SHS ISHARES TRUST 3 7 YR TREAS BD ETF	COST	40,257.	41,246.
811 SHS SCHWAB STRATEGIC TR INTL EQTY ETF	COST	25,355.	27,274.
2805 SHS SCHWAB STRATEGIC TR US REIT ETF	COST	116,023.	128,918.
2231 SHS SPDR SERIES TRUST PORTFOLIO MD ETF	COST	74,880.	80,829.
1687.643 SHS DFA INTL SM CO INST	COST	34,384.	31,896.
2311.582 SHS DFA US SM CAP VALUE INST	COST	79,793.	79,611.
843134.2 SHS FEDERATED INVESTORS GOVT OBLIGATIONS PREMIER	COST	843,134.	843,134.
1359.003 SHS EATON VANCE FLOATING RATE	COST	12,000.	12,027.
353.208 SHS INVESCO OPPENHEIMER DEV MARKETS	COST	15,000.	16,103.
199.243 SHS BWG CLEARBRIDGE INTERNATIONAL GROWTH FUND CLASS IS	COST	10,000.	10,859.
558.085 SHS MFS MID CAP VALUE RS	COST	13,930.	14,192.
TOTAL TO FORM 990-PF, PART II, LINE 13		3,131,157.	3,478,120.

FORM 990-PF GRANT APPLICATION SUBMISSION INFORMATION STATEMENT 12
PART XV, LINES 2A THROUGH 2D

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

AMANDA K. MORGAN
11709 ROE AVENUE, SUITE D138
LEAWOOD, KS 66211

TELEPHONE NUMBER

913-851-8385

FORM AND CONTENT OF APPLICATIONS

BRIEF LETTER STATING GENERAL NATURE, GOALS, & PURPOSE OF REQUESTING ORGANIZATION

ANY SUBMISSION DEADLINES

SUBMISSION SHOULD BE MADE BY DECEMBER 31ST FOR REQUEST FOR FUNDS FOR NEXT CALENDAR YEAR

RESTRICTIONS AND LIMITATIONS ON AWARDS

ORGANIZATION MUST BE TAX EXEMPT UNDER IRC 501(C)(3)

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold, e g , real estate, 2-story brick warehouse, or common stock, 200 shs. MLC Co.	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr)	(d) Date sold (mo , day, yr.)
1a	24 SHS CELGENE CORP	P	01/03/18	01/03/19
b	196 SHS GENERAL ELECTRIC CO	P	VARIOUS	08/15/19
c	10 SHS KRAFT HEINZ COMPANY	P	01/07/19	08/14/19
d	US TREASURY NOTES DTD 06/21/2018	P	08/08/19	12/03/19
e	.82 SHS WABTEC CORP	P	VARIOUS	03/06/19
f	31 SHS ALTRIA GROUP INC	P	01/04/18	03/21/19
g	AMAZON.COM INC SR NOTE DTD 11/29/2012	P	01/03/18	02/13/19
h	BANK OF AMERICA CORP DTD 10/19/2015	P	01/03/18	05/09/19
i	38 SHS CAMPBELL SOUP CO	P	VARIOUS	06/20/19
j	465.357 SHS DFA EMERGING MARKETS CORE EQUITY	P	VARIOUS	08/21/19
k	293.255 SHS DFA INTERNATIONAL SMALL CAP VALUE	P	01/30/18	08/21/19
l	GENERAL ELECTRIC CAPITAL CORP MEDIUM TERM NOTE DT	P	01/03/18	08/07/19
m	559.284 SHS GUGGENHEIM MACRO OPPORTUNITIES INSTL	P	01/02/18	08/21/19
n	14 SHS HESS CORP	P	01/03/18	07/31/19
o	2112.933 SHS IVY INTERNATIONAL CORE EQUITY	P	VARIOUS	08/21/19

	(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	2,005.		2,621.	<616.>
b	1,626.		2,041.	<415.>
c	258.		454.	<196.>
d	3,015.		3,011.	4.
e	57.		64.	<7.>
f	1,746.		2,194.	<448.>
g	2,976.		2,994.	<18.>
h	3,993.		4,016.	<23.>
i	1,546.		1,640.	<94.>
j	9,079.		11,363.	<2,284.>
k	5,021.		7,041.	<2,020.>
l	3,000.		3,000.	0.
m	14,485.		15,000.	<515.>
n	918.		693.	225.
o	35,054.		43,000.	<7,946.>

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col (h)) Gains (excess of col. (h) gain over col (k), but not less than "-0-")
	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col (j), if any	
a				<616.>
b				<415.>
c				<196.>
d				4.
e				<7.>
f				<448.>
g				<18.>
h				<23.>
i				<94.>
j				<2,284.>
k				<2,020.>
l				0.
m				<515.>
n				225.
o				<7,946.>

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	
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) If (loss), enter "-0-" in Part I, line 8	3	

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold, e g , real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr.)
1a	30 SHS KRAFT HEINZ COMPANY	P	01/04/18	08/14/19
b	491.871 SHS T ROWE PRICE MID CAP VALUE FUND	P	VARIOUS	12/10/19
c	US TREASURY NOTE DTD 1/31/2014	P	01/03/18	01/16/19
d	US TREASURY NOTE DTD 8/15/2009	P	01/03/18	08/08/19
e	US TREASURY NOTE DTD 8/15/2011	P	01/03/18	08/13/19
f	VERIZON COMMUNICATIONS INC SENIOR NOTE DTD 11/7/2	P	01/03/18	02/20/19
g	3 SHS MEDTRONIC PLC	P	01/04/18	01/07/19
h	6756 SHS SCHWAB STRATEGIC TR INTL EQUITY	P	VARIOUS	08/20/19
i	179 SHS ISHARES TRUST CORE S & P 500	P	03/24/17	08/20/19
j	24 SHS VANGUARD INT-TERM CORP ETF	P	10/19/16	03/28/19
k	465 SHS VANGUARD INT-TERM CORP ETF	P	VARIOUS	05/08/19
l	625 SHS VANGUARD MID CAP ETF	P	VARIOUS	08/20/19
m	CAPITAL GAINS DIVIDENDS			
n				
o				

	(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	774.		2,333.	<1,559.>
b	13,945.		15,000.	<1,055.>
c	8,996.		8,985.	11.
d	8,002.		8,003.	<1.>
e	3,028.		3,001.	27.
f	3,923.		3,950.	<27.>
g	247.		254.	<7.>
h	206,257.		210,870.	<4,613.>
i	52,585.		42,280.	10,305.
j	2,080.		2,139.	<59.>
k	40,314.		41,311.	<997.>
l	102,893.		77,987.	24,906.
m	7,018.			7,018.
n				
o				

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

	(i) F M.V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a				<1,559.>
b				<1,055.>
c				11.
d				<1.>
e				27.
f				<27.>
g				<7.>
h				<4,613.>
i				10,305.
j				<59.>
k				<997.>
l				24,906.
m				7,018.
n				
o				

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	19,596.
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) If (loss), enter "-0-" in Part I, line 8	3	N/A

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold, e g , real estate, 2-story brick warehouse; or common stock, 200 shs MLC Co	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr)	(d) Date sold (mo., day, yr.)
1a	24 SHS CELGENE CORP	P	01/03/18	01/03/19
b	196 SHS GENERAL ELECTRIC CO	P	VARIOUS	08/15/19
c	10 SHS KRAFT HEINZ COMPANY	P	01/07/19	08/14/19
d	US TREASURY NOTES DTD 06/21/2018	P	08/08/19	12/03/19
e	.82 SHS WABTEC CORP	P	VARIOUS	03/06/19
f	31 SHS ALTRIA GROUP INC	P	01/04/18	03/21/19
g	AMAZON.COM INC SR NOTE DTD 11/29/2012	P	01/03/18	02/13/19
h	BANK OF AMERICA CORP DTD 10/19/2015	P	01/03/18	05/09/19
i	38 SHS CAMPBELL SOUP CO	P	VARIOUS	06/20/19
j	465.357 SHS DFA EMERGING MARKETS CORE EQUITY	P	VARIOUS	08/21/19
k	293.255 SHS DFA INTERNATIONAL SMALL CAP VALUE	P	01/30/18	08/21/19
l	GENERAL ELECTRIC CAPITAL CORP MEDIUM TERM NOTE DT	P	01/03/18	08/07/19
m	559.284 SHS GUGGENHEIM MACRO OPPORTUNITIES INSTL	P	01/02/18	08/21/19
n	14 SHS HESS CORP	P	01/03/18	07/31/19
o	2112.933 SHS IVY INTERNATIONAL CORE EQUITY	P	VARIOUS	08/21/19

	(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	2,005.		2,621.	<616.>
b	1,626.		2,041.	<415.>
c	258.		454.	<196.>
d	3,015.		3,011.	4.
e	57.		64.	<7.>
f	1,746.		2,194.	<448.>
g	2,976.		2,994.	<18.>
h	3,993.		4,016.	<23.>
i	1,546.		1,640.	<94.>
j	9,079.		11,363.	<2,284.>
k	5,021.		7,041.	<2,020.>
l	3,000.		3,000.	0.
m	14,485.		15,000.	<515.>
n	918.		693.	225.
o	35,054.		43,000.	<7,946.>

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

	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col. (j), if any	(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a				<616.>
b				<415.>
c				<196.>
d				4.
e				<7.>
f				<448.>
g				<18.>
h				<23.>
i				<94.>
j				<2,284.>
k				<2,020.>
l				0.
m				<515.>
n				225.
o				<7,946.>

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	
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). If (loss), enter "-0-" in Part I, line 8	3	

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold, e g , real estate, 2-story brick warehouse; or common stock, 200 shs MLC Co.	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr)	(d) Date sold (mo , day, yr)
1a	30 SHS KRAFT HEINZ COMPANY	P	01/04/18	08/14/19
b	491.871 SHS T ROWE PRICE MID CAP VALUE FUND	P	VARIOUS	12/10/19
c	US TREASURY NOTE DTD 1/31/2014	P	01/03/18	01/16/19
d	US TREASURY NOTE DTD 8/15/2009	P	01/03/18	08/08/19
e	US TREASURY NOTE DTD 8/15/2011	P	01/03/18	08/13/19
f	VERIZON COMMUNICATIONS INC SENIOR NOTE DTD 11/7/2	P	01/03/18	02/20/19
g	3 SHS MEDTRONIC PLC	P	01/04/18	01/07/19
h	6756 SHS SCHWAB STRATEGIC TR INTL EQUITY	P	VARIOUS	08/20/19
i	179 SHS ISHARES TRUST CORE S & P 500	P	03/24/17	08/20/19
j	24 SHS VANGUARD INT-TERM CORP ETF	P	10/19/16	03/28/19
k	465 SHS VANGUARD INT-TERM CORP ETF	P	VARIOUS	05/08/19
l	625 SHS VANGUARD MID CAP ETF	P	VARIOUS	08/20/19
m	CAPITAL GAINS DIVIDENDS			
n				
o				

	(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	774.		2,333.	<1,559.>
b	13,945.		15,000.	<1,055.>
c	8,996.		8,985.	11.
d	8,002.		8,003.	<1.>
e	3,028.		3,001.	27.
f	3,923.		3,950.	<27.>
g	247.		254.	<7.>
h	206,257.		210,870.	<4,613.>
i	52,585.		42,280.	10,305.
j	2,080.		2,139.	<59.>
k	40,314.		41,311.	<997.>
l	102,893.		77,987.	24,906.
m	7,018.			7,018.
n				
o				

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a				<1,559.>
b				<1,055.>
c				11.
d				<1.>
e				27.
f				<27.>
g				<7.>
h				<4,613.>
i				10,305.
j				<59.>
k				<997.>
l				24,906.
m				7,018.
n				
o				

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	19,596.
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) If (loss), enter "-0-" in Part I, line 8	3	N/A

Part XV Supplementary Information

3a Grants and Contributions Paid During the Year Continuation of Purpose of Grant or Contribution

NAME OF RECIPIENT - CANCER LEAGUE OF COLORADO

TO SECURE THE CURE OR CONTROL OF CANCER BY RAISING FUNDS TO SUPPORT INNOVATIVE CANCER RESEARCH AND CANCER-RELATED SERVICES IN THE STATE OF COLORADO

NAME OF RECIPIENT - COLORADO PHOTOGRAPHIC ARTS CENTER

DEDICATED TO THE ART OF PHOTOGRAPHY, OFFERING CONTEMPORARY PHOTOGRAPHY EXHIBITIONS, CLASSES, WORKSHOPS, PORTFOLIO REVIEWS, A DARKROOM, AND COMMUNITY

NAME OF RECIPIENT - KENT DENVER FUND

TO SUPPORT THE STUDENTS, TEACHERS, COACHES, ADVISORS AND PROGRAMS OF THE COLLEGE-PREPARATORY SCHOOL

NAME OF RECIPIENT - UNIVERSITY OF KANSAS HILLEL

TO CONNECT JEWISH STUDENTS TO EACH OTHER, TO INSPIRE AND EQUIP THE NEXT GENERATION OF JEWISH LEADERS AND TO BUILD A THRIVING JEWISH COMMUNITY ON CAMPUS

NAME OF RECIPIENT - JEWISH COMMUNITY CENTER

TO BUILD A STRONG, VIBRANT AND INCLUSIVE COMMUNITY THAT ENHANCES WELLNESS, MEANING AND JOY, BASED ON JEWISH VALUES, HERITAGE AND CULTURE

NAME OF RECIPIENT - PLASTIC OCEAN PROJECT

TAKE ON THE CHALLENGE OF REMOVING PLASTICS FROM OUR OCEANS WHILE CREATING SUSTAINABLE BUSINESSES IN THE PROCESS

NAME OF RECIPIENT - UNIVERSITY OF COLORADO - ARTS DEPARTMENT

Part XV **Supplementary Information**

3a Grants and Contributions Paid During the Year Continuation of Purpose of Grant or Contribution

COMMITTED TO THE PRACTICE, PRODUCTION, CRITICAL AND HISTORICAL STUDY OF ART WITHIN A LIBERAL ARTS EDUCATION

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
WATER IS LIFE P O BOX 2038 PHOENIX, AZ 85001	N/A	TAX-EXEMPT CHARITY	TO PROVIDE CLEAN WATER, SANITATION AND HYGIENE PROGRAMS	10,000.
TORAH LEARNING CENTER 8800 WEST 103RD STREET OVERLAND PARK, KS 66212	N/A	TAX-EXEMPT CHARITY	OFFERS INNOVATIVE AND UNIQUE JEWISH PROGRAMMING AND EDUCATION	7,000.
Total from continuation sheets				

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
DENVER ART MUSEUM 100 WEST 14TH AVE PARKWAY DENVER, CO 80204	N/A	TAX-EXEMPT CHARITY	PROVIDE ART FROM AROUND THE WORLD TO THE COMMUNITY	10,000.
GRALAND COUNTRY DAY SCHOOL 55 CLEMONT STREET DENVER, CO 80220	N/A	TAX-EXEMPT CHARITY	EMPHASIZES THE DEVELOPMENT OF GLOBALLY AND SOCIALLY CONSCIOUS LEADERS WHO EXCEL ACADEMICALLY	10,000.
JEWISH FAMILY SERVICES 5801 WEST 115TH ST, SUITE 103 OVERLAND PARK, KS 66211	N/A	TAX-EXEMPT CHARITY	PROVIDE MENTAL HEALTH SERVICES, LIFE CRISIS ASSISTANCE	25,000.
JEWISH FEDERATION OF GREATER KANSAS CITY 5801 WEST 115TH STREET OVERLAND PARK, KS 66211	N/A	TAX-EXEMPT CHARITY	PROVIDE ASSISTANCE, SAFETY-NET, EDUCATION FOR YOUTH AND FAMILIES	25,000.
JUDAISM YOUR WAY 600 GRANT STREET, SUITE 308 DENVER, CO 80203	N/A	TAX-EXEMPT CHARITY	OFFERS RABBINICAL SERVICES FOR JEWISH AND INTERFAITH FAMILIES AND WELCOMING HOLIDAY SERVICES	20,000.
KENT DENVER FUND 4000 EAST QUINCY AVENUE ENGLEWOOD, CO 80113	N/A	TAX-EXEMPT CHARITY	TO SUPPORT THE STUDENTS, TEACHERS, COACHES, ADVISORS AND PROGRAMS OF THE COLLEGE-PREPARATORY	10,000.
UNIVERSITY OF KANSAS HILLEL 722 NEW HAMPSHIRE STREET LAWRENCE, KS 66044	N/A	TAX EXEMPT CHARITY	TO CONNECT JEWISH STUDENTS TO EACH OTHER, TO INSPIRE AND EQUIP THE NEXT GENERATION OF JEWISH	5,000.
JEWISH COMMUNITY CENTER 5801 WEST 115TH STREET OVERLAND PARK, KS 66211	N/A	TAX-EXEMPT CHARITY	TO BUILD A STRONG, VIBRANT AND INCLUSIVE COMMUNITY THAT ENHANCES WELLNESS, MEANING AND JOY, BASED	10,000.
PLASTIC OCEAN PROJECT 1739 BURNETT BLVD WILMINGTON, NC 28409	N/A	TAX EXEMPT CHARITY	TAKE ON THE CHALLENGE OF REMOVING PLASTICS FROM OUR OCEANS WHILE CREATING SUSTAINABLE BUSINESSES IN THE	5,000.
UNIVERSITY OF COLORADO - ARTS DEPARTMENT 1085 18TH STREET BOULDER, CO 80309	N/A	TAX-EXEMPT CHARITY	COMMITTED TO THE PRACTICE, PRODUCTION, CRITICAL AND HISTORICAL STUDY OF ART WITHIN A LIBERAL	22,000.
Total from continuation sheets				159,000.