

Form **990-PF****Return of Private Foundation**

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

OMB No. 1545-0047

2019

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

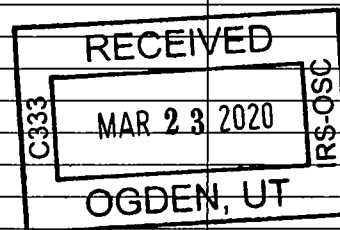
▶ Do not enter social security numbers on this form as it may be made public.
▶ Go to www.irs.gov/Form990PF for instructions and the latest information.

For calendar year 2019 or tax year beginning

, and ending

Name of foundation NORMAN & ELAINE POLSKY FAMILY CHARITABLE FOUNDATION		A Employer identification number 48-1232337						
Number and street (or P.O. box number if mail is not delivered to street address) 4801 WEST 110TH STREET	Room/suite #150	B Telephone number 913-341-8500						
City or town, state or province, country, and ZIP or foreign postal code OVERLAND PARK, KS 66211		C If exemption application is pending, check here ☐ b						
G Check all that apply. <table border="0"> <tr> <td>☐ Initial return</td> <td>☐ Initial return of a former public charity</td> </tr> <tr> <td>☐ Final return</td> <td>☐ Amended return</td> </tr> <tr> <td>☐ Address change</td> <td>☐ Name change</td> </tr> </table>		☐ Initial return	☐ Initial return of a former public charity	☐ Final return	☐ Amended return	☐ Address change	☐ Name change	D 1 Foreign organizations, check here ☐
☐ Initial return	☐ Initial return of a former public charity							
☐ Final return	☐ Amended return							
☐ Address change	☐ Name change							
H Check type of organization <table border="0"> <tr> <td>☒ Section 501(c)(3) exempt private foundation</td> <td>☐ Section 4947(a)(1) nonexempt charitable trust</td> <td>☐ Other taxable private foundation</td> </tr> </table>		☒ Section 501(c)(3) exempt private foundation	☐ Section 4947(a)(1) nonexempt charitable trust	☐ Other taxable private foundation	E If private foundation status was terminated under section 507(b)(1)(A), check here ☐			
☒ 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) \$ 3,485,786. (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				N/A	
2 Check ☒ if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities		80,768.	79,718.		STATEMENT 1
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		60,021.			
b Gross sales price for all assets on line 6a 783,591.					
7 Capital gain net income (from Part IV, line 2)			60,021.		
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		140,789.	139,739.		
13 Compensation of officers, directors, trustees, etc.		0.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 2		3,985.	3,985.		0.
c Other professional fees STMT 3		16,799.	16,799.		0.
17 Interest					
18 Taxes STMT 4		4,052.	506.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings		835.	835.		0.
22 Printing and publications					
23 Other expenses STMT 5		55.	55.		0.
24 Total operating and administrative expenses. Add lines 13 through 23		25,726.	22,180.		0.
25 Contributions, gifts, grants paid		164,000.			164,000.
26 Total expenses and disbursements. Add lines 24 and 25		189,726.	22,180.		164,000.
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements		<48,937.>			
b Net investment income (if negative, enter -0-)			117,559.		
c Adjusted net income (if negative, enter -0-)				N/A	



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		20,361.		
	2	Savings and temporary cash investments		165,957.	119,235.	119,235.
	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				
	b	Investments - corporate stock STMT 7		180,355.	518,419.	552,516.
	c	Investments - corporate bonds				
	11	Investments - land, buildings, and equipment basis ▶				
	Less: accumulated depreciation ▶					
12	Investments - mortgage loans					
13	Investments - other STMT 8		2,641,570.	2,322,985.	2,811,929.	
14	Land, buildings, and equipment basis ▶					
	Less: accumulated depreciation ▶					
15	Other assets (describe ▶ STATEMENT 9)		3,439.	2,106.	2,106.	
16	Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		3,011,682.	2,962,745.	3,485,786.	
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		3,011,682.	2,962,745.	
	29	Total net assets or fund balances		3,011,682.	2,962,745.	
	30	Total liabilities and net assets/fund balances		3,011,682.	2,962,745.	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year - Part II, column (a), line 29 (must agree with end-of-year figure reported on prior year's return)	1	3,011,682.
2	Enter amount from Part I, line 27a	2	<48,937.>
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	2,962,745.
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	2,962,745.

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 10 SHS FIRST REPUBLIC BANK		P	12/11/18	04/04/19
b 100 SHS INVESCO VARIABLE RATE PREFERRED		P	VARIOUS	12/16/19
c 65 SHS ISHARES US PREFERRED & HYBRID SECURITIES I		P	08/27/19	11/01/19
d 40 SHS ISHARES US PREFERRED & HYBRID SECURITIES I		P	08/27/19	11/06/19
e 10 SHS ISHARES US PREFERRED & HYBRID SECURITIES I		P	08/27/19	11/13/19
f 40 SHS ISHARES US PREFERRED & HYBRID SECURITIES I		P	08/27/19	12/03/19
g 75 SHS ISHARES US PREFERRED & HYBRID SECURITIES I		P	08/27/19	12/16/19
h 5 SHS NATIONAL GENERAL HOLDINGS CORP PREFERRED SHARE		P	12/11/18	03/15/19
i 20 SHS SPDR WELLS FARGO PREFERRED STOCK		P	05/07/19	06/26/19
j 35 SHS SPDR WELLS FARGO PREFERRED STOCK PSK		P	05/07/19	08/02/19
k 50 SHS SPDR WELLS FARGO PREFERRED STOCK PSK		P	05/07/19	11/06/19
l 35 SHS SPDR WELLS FARGO PREFERRED STOCK PSK		P	05/07/19	12/03/19
m 25 SHS SPDR WELLS FARGO PREFERRED STOCK PSK		P	05/07/19	12/16/19
n 15 SHS CHARLES SCHWAB CORPORATION		P	12/11/18	03/20/19
o 130 SHS AEGON N V PERP CAP SECS 6.375%		P	VARIOUS	11/20/19

(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 255.		249.	6.
b 2,571.		2,575.	<4.>
c 2,426.		2,431.	<5.>
d 1,488.		1,496.	<8.>
e 372.		374.	<2.>
f 1,470.		1,496.	<26.>
g 2,797.		2,805.	<8.>
h 108.		115.	<7.>
i 863.		852.	11.
j 1,522.		1,492.	30.
k 2,186.		2,131.	55.
l 1,510.		1,492.	18.
m 1,094.		1,066.	28.
n 389.		379.	10.
o 3,287.		3,360.	<73.>

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) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a			6.
b			<4.>
c			<5.>
d			<8.>
e			<2.>
f			<26.>
g			<8.>
h			<7.>
i			11.
j			30.
k			55.
l			18.
m			28.
n			10.
o			<73.>

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	15 SHS BB & T CORP DEP PFD SER H	P	02/07/17	08/01/19
b	50 SHS BB & T CORP DEP PFD SER H	P	02/07/17	08/02/19
c	125 SHS BANC OF CALIFORNIA INC PRD	P	VARIOUS	08/23/19
d	45 SHS CAPITAL ONE FINANCIAL CORP PFD SER F	P	VARIOUS	09/05/19
e	49 SHS CAPITAL ONE FINANCIAL CORP PFD SER F	P	07/19/16	09/06/19
f	51 SHS CAPITAL ONE FINANCIAL CORP PFD SER F	P	VARIOUS	09/09/19
g	3645.959 SHS DFA INTERNATIONAL SMALL CAP VALUE	P	VARIOUS	09/27/19
h	80 SHS DTE ENERGY CO SERIES F	P	02/03/17	03/07/19
i	25871.767 SHS EATON VANCE FLOATING RATE	P	02/21/17	07/22/19
j	2853.881 SHS EATON VANCE FLOATING RATEI	P	02/21/17	11/25/19
k	28 SHS FIRST REPUBLIC BANK SAN FRANCISCO	P	VARIOUS	03/29/19
l	10 SHS FIRST REPUBLIC BANK SAN FRANCISCO CA	P	07/16/16	04/01/19
m	2 SHS FIRST REPUBLIC BANK SAN FRANCISCO CA	P	07/19/16	04/02/19
n	49 SHS FIRST REPUBLIC BANK SAN FRANCISCO	P	07/19/16	04/03/19
o	6 SHS FIRST REPUBLIC BANK SAN FRANCISCO CA	P	07/19/16	04/04/19

(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 401.		383.	18.
b 1,330.		1,276.	54.
c 3,350.		3,313.	37.
d 1,167.		1,248.	<81.>
e 1,270.		1,350.	<80.>
f 1,321.		1,367.	<46.>
g 65,044.		70,900.	<5,856.>
h 2,133.		2,062.	71.
i 230,000.		232,587.	<2,587.>
j 25,000.		25,656.	<656.>
k 727.		772.	<45.>
l 260.		274.	<14.>
m 52.		55.	<3.>
n 1,259.		1,343.	<84.>
o 153.		164.	<11.>

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			18.
b			54.
c			37.
d			<81.>
e			<80.>
f			<46.>
g			<5,856.>
h			71.
i			<2,587.>
j			<656.>
k			<45.>
l			<14.>
m			<3.>
n			<84.>
o			<11.>

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	1675.598 SHS GUGGENHEIM MACRO OPPORTUNITIES INSTL	P	VARIOUS	09/27/19
b	17059.173 SHS IVY INTERNATIONAL CORE EQUITY	P	VARIOUS	09/27/19
c	95 SHS J P MORGAN CHASE & CO	P	07/19/16	10/31/19
d	38 SHS NATIONAL GENERAL HOLDINGS CORP PREF SHARE	P	08/09/16	03/15/19
e	47 SHS NATIONAL GENERAL HOLDINGS CORP PREF SHARE	P	08/09/16	03/18/19
f	24 SHS PUBLIC STORAGE PREF SHARE	P	02/03/17	08/01/19
g	31 SHS PUBLIC STORAGE PREF SHARE	P	02/03/17	08/02/19
h	55 SHS CHARLES SCHWAB CORPORATION PREF SHARE C	P	VARIOUS	08/22/19
i	55 SHS CHARLES SCHWAB CORPORATION	P	VARIOUS	03/07/19
j	80 SHS CHARLES SCHWAB CORPORATION	P	07/19/16	03/20/19
k	29 SHS STATE STREET CORP PREFERRED S	P	VARIOUS	03/25/19
l	7 SHS STATE STREET CORP PREFERRED S	P	03/14/17	03/26/19
m	5 SHS STATE STREET CORP PREFERRED S	P	03/14/17	03/27/19
n	24 SHS STATE STREET CORP PREFERRED S	P	03/14/17	03/28/19
o	1389.127 SHS IVY INTERNATIONAL CORE EQUITY	P	11/02/11	09/27/19

(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 43,348.		43,000.	348.
b 291,371.		282,063.	9,308.
c 2,439.		2,600.	<161.>
d 817.		986.	<169.>
e 1,000.		1,219.	<219.>
f 637.		583.	54.
g 815.		753.	62.
h 1,483.		1,527.	<44.>
i 1,463.		1,510.	<47.>
j 2,075.		2,189.	<114.>
k 744.		762.	<18.>
l 180.		182.	<2.>
m 128.		130.	<2.>
n 612.		624.	<12.>
o 23,726.		20,379.	3,347.

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			348.
b			9,308.
c			<161.>
d			<169.>
e			<219.>
f			54.
g			62.
h			<44.>
i			<47.>
j			<114.>
k			<18.>
l			<2.>
m			<2.>
n			<12.>
o			3,347.

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 CAPITAL GAINS DIVIDENDS				
b				
c				
d				
e				
f				
g				
h				
i				
j				
k				
l				
m				
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 56,948.			56,948.
b			
c			
d			
e			
f			
g			
h			
i			
j			
k			
l			
m			
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			56,948.
b			
c			
d			
e			
f			
g			
h			
i			
j			
k			
l			
m			
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	60,021.
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 (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

c

d

e

SEE ATTACHED STATEMENTS

(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

783,591.

723,570.

60,021.

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

60,021.

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

60,021.

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?

X

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

2017

2016

2015

2014

2 Total of line 1, column (d)

2

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

4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5

4

5 Multiply line 4 by line 3

5

6 Enter 1% of net investment income (1% of Part I, line 27b)

6

7 Add lines 5 and 6

7

8 Enter qualifying distributions from Part XII, line 4

8

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

923521 12-17-19

Form 990-PF (2019)

NORMAN & ELAINE POLSKY FAMILY

Form 990-PF (2019)

CHARITABLE FOUNDATION

48-1232337

Page 4

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

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b		1	2,351.
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	2,351.
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	2,351.
6 Credits/Payments:			
a 2019 estimated tax payments and 2018 overpayment credited to 2019	6a	2,960.	
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	2,960.	
8 Enter any penalty for underpayment of estimated tax. Check here ☐ 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	609.	
11 Enter the amount of line 10 to be Credited to 2020 estimated tax ☐ 609. Refunded ☐	11	0.	

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 ☐ \$ 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.		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 General Instruction T		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 ☐ 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	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		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

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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? Website address ► <u>N/A</u>	13	X	
14 The books are in care of ► <u>THE FOUNDATION</u> Telephone no. ► <u>913-341-8500</u> Located at ► <u>4801 WEST 110TH STREET, OVERLAND PARK, KS</u> ZIP+4 ► <u>66211</u>			
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	
16 At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►	16		X

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 6	☒ Yes ☐ No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No		
(6) Agree to pay money or property to a government official? (Exception: Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	☐ Yes ☒ No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions. Organizations relying on a current notice regarding disaster assistance, check here	1b		X
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.)	2b	N/A	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► _____, _____, _____			
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.)	3b	N/A	
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

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

5a During the year, did the foundation pay or incur any amount to		Yes	No
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes ☒ No		
(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	☐ Yes ☒ No		
(3) Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes ☒ No		
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	☐ Yes ☒ No		
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes ☒ No		
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions	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		
If "Yes," attach the statement required by Regulations section 53.4945-5(d)	☐ Yes ☐ No		
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes ☒ No		
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
SEE STATEMENT 10		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 -- ALL CHARITABLE CONTRIBUTIONS WERE CASH CONTRIBUTIONS PAID DIRECTLY TO THE CHARITABLE ORGANIZATION.	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.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	3,244,010.
b	Average of monthly cash balances	1b	180,169.
c	Fair market value of all other assets	1c	3,899.
d	Total (add lines 1a, b, and c)	1d	3,428,078.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	3,428,078.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	51,421.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	3,376,657.
6	Minimum investment return. Enter 5% of line 5	6	168,833.

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	168,833.
2a	Tax on investment income for 2019 from Part VI, line 5	2a	2,351.
b	Income tax for 2019. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	2,351.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	166,482.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	166,482.
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	166,482.

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	164,000.
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	164,000.
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	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	164,000.

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.

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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				166,482.
2 Undistributed income, if any, as of the end of 2019				
a Enter amount for 2018 only			156,793.	
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. ▶ \$ 164,000.				
a Applied to 2018, but not more than line 2a			156,793.	
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				7,207.
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				159,275.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	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				

N/A

-
- b**
- Check box to indicate whether the foundation is a private operating foundation described in section

☐ 4942(1)(3) or ☐ 4942(1)(5)

- (4) Gross investment income

[illegible]

STATEMENT 11

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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				
ASPEN COUNTRY DAY SCHOOL 85 COUNTRY DAY WAY ASPEN, CO 81611	N/A	TAX-EXEMPT ORGANIZATION	COMMITMENT TO RIGOROUS ACADEMICS, CREATIVE ARTS, AND OUTDOOR EDUCATION WHICH IGNITES CURIOSITY	15,000.
ASPEN SANTA FE BALLET 245 SAGE WAY ASPEN, CO 81611	N/A	TAX-EXEMPT ORGANIZATION	SHAPE THE CULTURAL LANDSCAPE OF THE COMMUNITY AND INFLUENCE THE DANCE FIELD	1,000.
JEWISH FAMILY & CHILDREN'S SERVICES OF SAN FRANCISCO P. O. BOX 159004 SAN FRANCISCO, CA 94115	N/A	TAX EXEMPT	LIFELINE FOR CHILDREN, ADULTS, AND FAMILIES FACING PERSONAL CRISES OR CHALLENGES	2,000.
HORIZONS FOUNDATION 550 MONTGOMERY STREET, SUITE 700 SAN FRANCISCO, CA 94111	N/A	TAX EXEMPT	HELP IMPROVE LIVES OF LGBT COMMUNITY RELIGIOUS, EDUCATIONAL AND CHARITABLE PURPOSE OF TAX EXEMPT ORG	2,000.
SOUTHERN POVERTY LAW CENTER 400 WASHINGTON AVENUE MONTGOMERY, AL 36104	N/A	TAX EXEMPT	HELP SEEK JUSTICE FOR MOST VULNERABLE MEMBERS OF SOCIETY	2,000.
Total	SEE CONTINUATION SHEET(S)			164,000.
b Approved for future payment				
NONE				
Total				0.

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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
CONGREGATION SHA'AR ZAHAV-THE RAINBOW FUND 290 DOLORES STREET SAN FRANCISCO, CA 94103	N/A	TAX EXEMPT	RELIGIOUS, EDUCATIONAL AND CHARITABLE PURPOSE OF TAX EXEMPT ORGANIZATION	3,000.
JEWISH FEDERATION OF GREATER KANSAS CITY 5801 WEST 115TH STREET, SUITE 201 OVERLAND PARK, KS 66209	N/A	TAX EXEMPT	RELIGIOUS, EDUCATIONAL AND CHARITABLE PURPOSE OF TAX EXEMPT ORGANIZATION	23,000.
SHEPS PLACE SENIOR DOG SANCTUARY 17012 EAST TRUMAN ROAD INDEPENDENCE, MO 64056	N/A	TAX-EXEMPT ORGANIZATION	OPERATE A SANCTUARY FOR HOMELESS SENIOR DOGS IN THE KANSAS CITY AREA. PROVIDE THEM WITH SUPPORT AND	5,000.
WALKIN AND ROLLIN COSTUMES INC 26050 WEST 143RD PLACE OLATHE, KS 66061	N/A	TAX EXEMPT	PROVIDE ANY CHILD WITH SPECIAL NEEDS EQUIPMENT A UNIQUE AND CUSTOM BUILT COSTUME FREE OF CHARGE TO THE	5,000.
RONALD MCDONALD HOUSE OF DANVILLE P O BOX 300 DANVILLE, PA 17821	N/A	TAX EXEMPT	KEEP FAMILIES WITH SICK CHILDREN TOGETHER AND BE NEAR THE CARE AND RESOURCES THAT THEY NEED	5,000.
SAN FRANCISCO ART & FILM FOR TEENAGERS 540 ALABAMA STREET SAN FRANCISCO, CA 94110	N/A	TAX EXEMPT	PROVIDE THE ARTS AND CULTURAL EVENTS TO BAY AREA STUDENTS TO STIMULATE THEIR CURIOSITY, EXCITE	3,000.
UNIVERSITY OF ARIZONA HILLEL 1245 EAST 2ND STREET TUSCON, AZ 85719	N/A	TAX EXEMPT	BUILD A VIBRANT, DIVERSE, MEANINGFUL AND EMPOWERED JEWISH COMMUNITY AT THE UNIVERSITY OF ARIZONA	1,000.
GREATER KANSAS CITY CHAPTER OF HADASSAH 3909 WEST 101ST TERRACE OVERLAND PARK, KS 66207	N/A	TAX EXEMPT	RELIGIOUS, EDUCATIONAL AND CHARITABLE PURPOSE OF TAX EXEMPT ORGANIZATION	3,000.
MIDWEST CENTER FOR HOLOCAUST EDUCATION 5801 WEST 115TH STREET, SUITE 106 OVERLAND PARK, KS 66211	N/A	TAX EXEMPT	RELIGIOUS, EDUCATIONAL AND CHARITABLE PURPOSE OF TAX EXEMPT ORGANIZATION	2,000.
WONDERSCOPE 5700 KING STREET SHAWNEE, KS 66203	N/A	TAX EXEMPT ORGANIZATION	MUSEUM FEATURING HANDS ON EXHIBITS ABOUT ART, SCIENCE, MATH AND READING DESIGNED FOR CHILDREN UNDER 8	5,000.
Total from continuation sheets				142,000.

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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
JAMPOLSKY OUTREACH FOUNDATION -- ATTITUDINAL HEALING INTERNATIONAL 3001 BRIDGEWAY, SUITE K-368 SAUSALITO, CA 94965	N/A	TAX EXEMPT	CENTER FOR ATTITUDINAL HEALING	2,000.
JEWISH COMMUNITY FOUNDATION 5801 WEST 115TH STREET, SUITE 103 OVERLAND PARK, KS 66211	N/A	TAX EXEMPT	RELIGIOUS, EDUCATIONAL AND CHARITABLE PURPOSE OF TAX EXEMPT ORGANIZATION	10,000.
CHARITIES AID FOUNDATION OF AMERICA 225 REINKERS LANE, SUITE 375 ALEXANDRIA, VA 22314	N/A	TAX EXEMPT	PROVIDE GRANTS TO CHARITABLE ORGANIZATIONS	12,000.
FAITH ALWAYS WINS FOUNDATION 11900 WEST 87TH ST, SUITE 225 LENEXA, KS 66215	N/A	TAX EXEMPT	PROMOTES INTERFAITH DIALOGUE BY ENGAGING ALL PEOPLE TO DISCOVER COMMONALITIES AND OVERCOME EVIL WITH	1,000.
BURNS RECOVERED SUPPORT GROUP 6220 S LINDBERGH BLVD, SUITE 203 ST LOUIS, MO 63123	N/A	TAX EXEMPT	MISSOURI CHILDREN'S BURN CAMP	5,000.
CHABAD OF LEAWOOD 5051 WEST 134TH STREET LEAWOOD, KS 66209	N/A	TAX EXEMPT	PROVIDE EDUCATIONAL AND SOCIAL SERVICES TO THE COMMUNITY WITH A SPECIAL EMPHASIS ON THE YOUTH. DEVELOP	1,000.
JEWISH ROCK RADIO 14560 WHITE BIRCH VALLEY LANE CHESTERFIELD, MO 63017	N/A	TAX EXEMPT	PUBLIC JEWISH RADIO RELIGIOUS, EDUCATIONAL AND CHARITABLE PURPOSE OF TAX EXEMPT ORGANIZATION	5,000.
UNIVERSITY OF KANSAS HILLEL 722 NEW HAMPSHIRE STREET LAWRENCE, KS 66044	N/A	TAX EXEMPT	CONNECT JEWISH STUDENTS TO EACH OTHER AND THEIR JUDAISM, TO INSPIRE AND EQUIP THE NEXT GENERATION OF	1,000.
JEWISH FAMILY SERVICES 5801 WEST 115TH STREET, SUITE 103 OVERLAND PARK, KS 66211	N/A	TAX EXEMPT	JEWISH CHAPLAINCY PROGRAM AND FOOD PANTRY	1,000.
RICHMOND COMMUNITY FOUNDATION 1014 FLORIDA AVENUE, SUITE 200 RICHMOND, CA 94804	N/A	TAX EXEMPT	WORK TOWARDS HEALTHY SUSTAINABLE COMMUNITIES WHERE FAMILIES THRIVE AND CHILDREN ARE GIVEN NEW	3,000.
Total from continuation sheets				

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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
NATIONAL COUNCIL OF JEWISH WOMEN 5311 WEST 75TH STEET PRAIRIE VILLAGE, KS 66208	N/A	TAX EXEMPT	SOCIAL JUSTICE BY IMPROVING THE QUALITY OF LIFE FOR WOMEN, CHILDREN AND FAMILIES AND BY SAFEGUARDING	5,000.
REACHING OUT FROM WITHIN P O BOX 8527 PRAIRIE VILLAGE, KS 66208	N/A	TAX EXEMPT	PRISON REHABILITATION PROGRAMS FOR INMATES WHO WANT TO MAKE LASTING CHANGES IN THEIR BEHAVIOR	2,000.
VILLAGE SHALOM 5500 WEST 123RD STREET OVERLAND PARK, KS 66209	N/A	TAX EXEMPT ORGANIZATION	BRING DIGNITY, CHOICE, COMPASSION AND CARE TO ELDERS DURING THEIR LIVES AND LIFE TRANSITIONS.	25,000.
CONGREGATION BETH SHALOM 14200 LAMAR AVENUE OVERLAND PARK, KS 66233	N/A	TAX EXEMPT	RELIGIOUS, EDUCATIONAL AND CHARITABLE PURPOSE OF TAX EXEMPT ORGANIZATION	3,000.
METROPOLITAN ENSEMBLE THEATER 3927 MAIN STREET KANSAS CITY, MO 64111	N/A	TAX EXEMPT	PERFORMING ARTS THEATER COMMITTED TO THE ART OF THE STORY TO DEEPEN UNDERSTANDING OF EACH	3,000.
THE FARM COLLABORTIVE P O BOX 8064 ASPEN, CO 81612	N/A	TAX EXEMPT	SUPPORT STUDENT CENTERED COOPERATIVE FARM	2,000.
JORDON THOMAS FOUNDATION P.O. BOX 22764 CHATTANOOGA, TN 37422	N/A	TAX EXEMPT	PROVIDES CHILDREN AFFECTED BY LIMB LOSS WITH THE PROSTHESES THEY NEED THROUGHOUT CHILDHOOD AND	4,000.
LOS CENZONTLES CULTURAL ARTS ACADEMY 13108 SAN PABLO AVENUE SAN PABLO, CA 94805	N/A	TAX EXEMPT	PROVIDE A HUB FOR LATINO ARTISTS WHILE WORKING TO AMPLIFY THEIR MEXICAN ROOTS	2,000.
Total from continuation sheets				

Part XV Supplementary Information

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

NAME OF RECIPIENT - ASPEN COUNTRY DAY SCHOOL

COMMITMENT TO RIGOROUS ACADEMICS, CREATIVE ARTS, AND OUTDOOR EDUCATION
WHICH IGNITES CURIOSITY, CONFIDENCE AND CRITICAL THINKING. ENCOURGE
STUDENTS TO STRIVE FOR INDIVIDUAL EXCELLENCE AND INSTILLS IN THEM A
LIFELONG LOVE OF LEARNING, SENSE OF PURPOSE AND RESPONSIBLE CITIZENSHIP

NAME OF RECIPIENT - JEWISH FAMILY & CHILDREN'S SERVICES OF SAN FRANCISCO

LIFELINE FOR CHILDREN, ADULTS, AND FAMILIES FACING PERSONAL CRISES OR
CHALLENGES

NAME OF RECIPIENT - SHEPS PLACE SENIOR DOG SANCTUARY

OPERATE A SANCTUARY FOR HOMELESS SENIOR DOGS IN THE KANSAS CITY AREA.
PROVIDE THEM WITH SUPPORT AND ATTENTION AND NEW FAMILIES.

NAME OF RECIPIENT - WALKIN AND ROLLIN COSTUMES INC

PROVIDE ANY CHILD WITH SPECIAL NEEDS EQUIPMENT A UNIQUE AND CUSTOM
BUILT COSTUME FREE OF CHARGE TO THE FAMILY

NAME OF RECIPIENT - SAN FRANCISCO ART & FILM FOR TEENAGERS

PROVIDE THE ARTS AND CULTURAL EVENTS TO BAY AREA STUDENTS TO STIMULATE
THEIR CURIOSITY, EXCITE THEIR IMAGINATIONS AND HELP THEM ENTER A WIDER
WORLD

NAME OF RECIPIENT - FAITH ALWAYS WINS FOUNDATION

PROMOTES INTERFAITH DIALOGUE BY ENGAGING ALL PEOPLE TO DISCOVER
COMMONALITIES AND OVERCOME EVIL WITH ACTS OF KINDNESS

Part XV Supplementary Information

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

NAME OF RECIPIENT - CHABAD OF LEAWOOD

PROVIDE EDUCATIONAL AND SOCIAL SERVICES TO THE COMMUNITY WITH A SPECIAL
EMPHASIS ON THE YOUTH. DEVELOP INNOVATIVE PROGRAMS TO EXCITE AND
INSPIRE JEWISH YOUTH WITH A SENSE OF PRIDE IN THE RICH JEWISH HERITAGE

NAME OF RECIPIENT - UNIVERSITY OF KANSAS HILLEL

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

NAME OF RECIPIENT - RICHMOND COMMUNITY FOUNDATION

WORK TOWARDS HEALTHY SUSTAINABLE COMMUNITIES WHERE FAMILIES THRIVE AND
CHILDREN ARE GIVEN NEW HOPE FOR A BRIGHT AND ABUNDANT FUTURE

NAME OF RECIPIENT - NATIONAL COUNCIL OF JEWISH WOMEN

SOCIAL JUSTICE BY IMPROVING THE QUALITY OF LIFE FOR WOMEN, CHILDREN AND
FAMILIES AND BY SAFEGUARDING INDIVIDUAL RIGHTS AND FREEDOMS

NAME OF RECIPIENT - METROPOLITAN ENSEMBLE THEATER

PERFORMING ARTS THEATER COMMITTED TO THE ART OF THE STORY TO DEEPEN
UNDERSTANDING OF EACH OTHER AND OURSELVES

NAME OF RECIPIENT - JORDON THOMAS FOUNDATION

PROVIDES CHILDREN AFFECTED BY LIMB LOSS WITH THE PROSTHESES THEY NEED
THROUGHOUT CHILDHOOD AND ADOLESCENCE AND SERVING AS A CARING RESOURCE,
ADVOCATE AND SUPPORT SYSTEM FOR THESE CHILDREN AND THEIR PARENTS

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

Form **990-PF** (2019)

Part XVII	Information Regarding Transfers to and Transactions and Relationships With Noncharitable Exempt Organizations
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- | | | Yes | No |
|---|---|-------|----|
| 1 | Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c)(3) (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 | | |

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527?

☐ Yes ☒ No

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

**Sign
Here**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

May the IRS discuss this return with the preparer shown below? See instr

☒ Yes ☐ No

Signature of officer or trustee

Date _____

Title

CO-TRUSTEE

**Paid
Preparer
Use Only**

Print/Type preparer's name

Preparer's signature

Date _____

Check ☐ self-employed

PTIN	
------	--

ROBERT J.
O'HALLORAN

ROBERT J. O'HALLO	03/12/20
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03/12/20

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

Form **990-PF** (2019)

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES				STATEMENT	1
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	
MIDWEST TRUST CO--NONDIVIDEND DISTRIBUTIONS	1,050.	0.	1,050.	0.		
MIDWEST TRUST COMPANY	136,666.	56,948.	79,718.	79,718.		
TO PART I, LINE 4	137,716.	56,948.	80,768.	79,718.		

FORM 990-PF	ACCOUNTING FEES				STATEMENT	2
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 PREPARATION OF FORM 990-PF. ASSIST WITH COMPLIANCE OF PRIVATE FOUNDATION RULES AND REGULATIONS.	0. 0. 3,985.	0. 0. 3,985.			0. 0. 0.	
TO FORM 990-PF, PG 1, LN 16B	3,985.	3,985.			0.	

FORM 990-PF	OTHER PROFESSIONAL FEES				STATEMENT	3
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES		
INVESTMENTS FEES-MIDWEST TRUST COMPANY	16,799.	16,799.			0.	
TO FORM 990-PF, PG 1, LN 16C	16,799.	16,799.			0.	

FORM 990-PF	TAXES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FOREIGN TAXES ON INVESTMENT INCOME	506.	506.		0.	
EXCISE TAXES ON NET INVESTMENT INCOME	3,546.	0.		0.	
TO FORM 990-PF, PG 1, LN 18	4,052.	506.		0.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
MISCELLANEOUS EXPENSE-POSTAGE	55.	55.		0.	
TO FORM 990-PF, PG 1, LN 23	55.	55.		0.	

FOOTNOTES

STATEMENT 6

PART VII-B -- STATEMENTS REGARDING ACTIVITIES

QUESTION 1(A) (4):

STEVEN POLSKY AND MARK OLIVER ARE TWO OF THE TWELVE TRUSTEES OF THE NORMAN AND ELAINE POLSKY FAMILY CHARITABLE FOUNDATION. THEY ARE NOT ONE OF THE GRANTORS OF THE FOUNDATION. THESE TWO TRUSTEES ASSIST IN PROVIDING GUIDANCE AND ADVICE NECESSARY TO CARRY OUT THE EXEMPT PURPOSE OF THE FOUNDATION. THEY WERE REIMBURSED FOR THEIR TRAVEL EXPENSES TO ATTEND BOARD MEETINGS. THE REIMBURSEMENT WAS REASONABLE AND NOT EXCESSIVE.

FORM 990-PF

CORPORATE STOCK

STATEMENT

7

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
65 SHS ING GROEP NV 6.125% PFD	1,698.	1,693.
170 SHS WELLS FARGO & CO PEF SHARE X CL	4,409.	4,437.
90 SHS AXIS CAPITAL HLDGS LTD PEF	2,281.	2,321.
80 SHS CHIMERA INVESTMENT CORP PFD SERIES B	2,000.	2,142.
170 SHS INVESCO MORTGAGE CAPITAL INC	4,364.	4,519.
80 SHS LEGG MASON INC JR SUBORDINATED NT DTD 3/7/16	2,079.	2,125.
75 SHS TCF FINANCIAL CORP PREFERRED	1,894.	1,979.
255 SHS TWO HARBORS INVESTMENT CORP PFD SERIES B	6,501.	6,997.
160 SHS AT & T INC	3,795.	4,410.
175 SHS ALLSTATE CORP PFD	4,411.	4,784.
165 SHS ANNALY CAPITAL MANAGEMENT, INC	4,145.	4,265.
170 SHS ARCH CAP GROUP LTD	4,154.	4,384.
165 SHS BB & T CORP PFD	4,147.	4,198.
85 SHS BB & T CORP DEP PFD SER H	2,151.	2,285.
120 SHS BANK OF AMERICA CORP DEP SHS	3,000.	3,299.
80 SHS BANK OF AMERICA CORP PFD CUM SER C	2,074.	2,094.
270 SHS CHS INC CLASS B SER 4 PFD	7,786.	7,390.
165 SHS CAPITAL ONE FINANCIAL CORP PFD SERIES H	4,225.	4,430.
175 SHS CHIMERA INVESTMENT CORP PFD SERIES A	4,436.	4,615.
125 SHS CITIGROUP INC PFD S	3,418.	3,276.
75 SHS CITIGROUP INC PFD	2,016.	2,113.
160 SHS ENBRIDGE INC PFD FXD/FLT	3,987.	4,413.
110 SHS FIRST REPUBLIC BANK PEF SHARE	2,933.	2,846.
90 SHS GOLDMAN SACHS GROUP INC SER K PFD	2,425.	2,562.
105 SHS GOLDMAN SACHS GROUP INC	2,876.	2,800.
145 SHS HARTFORD FINL SVCS GROUP INC PFD	3,624.	4,006.
220 SHS HUNINGTON BANCSHARES	5,949.	5,720.
65 SHS IBERIABANK CORP PEF SHARE	1,763.	1,862.
130 SHS JPMORGAN CHASE & CO PEF SHARE	3,558.	3,346.
150 SHS KEY CORP PFD	4,164.	4,272.
75 SHS KEY CORP PREFERRED	1,864.	2,010.
165 SHS METLIFE INC NON-CUMMULATIVE PREFERRED	4,153.	4,509.
160 SHS MONMOUTH REAL ESTATE INVT GROUP PFD SER C	3,996.	3,987.
260 SHS MORGAN STANLEY DEP FIX/FLT	7,265.	7,324.
70 SHS PRUDENTIAL FINANACIAL INC JR SB NT PFD	1,693.	1,909.
55 PUBLIC STORAGE PEF SHARE	1,323.	1,421.
150 REGIONS FINANCIAL CORP PFD	4,297.	4,233.
90 SHS CHARLES SCHWAB CORP PEF SHARE C	2,454.	2,340.
145 SHS SOUTHERN CO JR SB 2015A	3,817.	3,824.
160 SHS STATE STREET CORP DEP PFD	4,552.	4,394.
75 SHS SYNOVUS FINANCIAL CORP PFS SERIES D	1,838.	1,988.
110 SHS US BANCORP DEPOSITARY SHS PFD	3,127.	3,038.
125 SHS VORNADO REALTY TRUST PFD SR M	3,036.	3,193.
40 SHS WEBSTER FINANCIAL CORP SHS RP	985.	1,034.
165 SHS WELLS FARGO & CO PEF SHARE	4,489.	4,288.

9 SHS AMAZON.COM	17,681.	16,631.
115 SHS AMERIPRISE FINANCIAL INC	16,856.	19,157.
85 SHS APPLE INC	17,525.	24,960.
60 SHS COSTCO WHOLESALE CORP	16,836.	17,635.
125 SHS DANAHER CORP	17,703.	19,185.
125 SHS WALT DISNEY CO	17,618.	18,079.
80 SHS HOME DEPOT INC	16,880.	17,470.
150 SHS J P MORGAN	17,069.	20,910.
80 SHS MCDONALDS CORP	17,141.	15,809.
125 SHS MICROSOFT CORP	17,300.	19,712.
55 SHS NETFLIX INC	17,058.	17,796.
125 SHS PNC FINANCIAL SERVICES GROUP INC	17,337.	19,954.
130 SHS PEPSICO	16,939.	17,767.
150 SHS PROCTOR & GAMBLE	17,246.	18,735.
275 SHS SPDR ENERGY SELECT SECTOR SPDR FUND	17,273.	16,511.
60 SHS THERMO FISHER SCIENTIFIC INC	17,530.	19,492.
100 SHS UNION PACIFIC CORP	17,353.	18,079.
130 UNITED TECHNOLOGIES CORP	17,233.	19,469.
300 SHS VERIZON COMMUNICATIONS INC	16,706.	18,420.
110 SHS ALLSTATE CORP PREFERRED SERIES H	2,763.	2,875.
145 SHS AMERICAN INTL GROUP INC	3,625.	3,964.
115 SHS AXA EQUITABLE HOLDINGS INC PREF A	2,873.	3,001.
60 SHS BANCORPSOUTH BANK PREFERRED SERIES A	1,500.	1,528.
175 SHS CAPITAL ONE FINANCIAL CORP PREFERRED	4,382.	4,391.
100 SHS CITIZENS FINANCIAL GROUP INC	2,638.	2,829.
60 SHS IBERIABANK CORP PREFERRED	1,505.	1,615.
85 SHS J P MORGAN CHASE & CO PREFERRED	2,131.	2,189.
95 SHS KIMCO REALTY CORP PREFERRED	2,203.	2,461.
80 SHS LEGG MASON INC PFD 5.45%	1,915.	2,063.
50 SHS NORTHERN TRUST CORP PREFERRED SERIES E	1,253.	1,307.
115 SHS SVB FINANCIAL GROUP PREFERRED A	2,877.	2,973.
75 SHS SYNOVUS FINANCIAL CORP PREFERRED	1,901.	2,003.
175 SHS SYNCHRONY FINANCIAL PREFERRED SERIES A	4,417.	4,471.
TOTAL TO FORM 990-PF, PART II, LINE 10B	518,419.	552,516.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	8
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
5955.280 SHS DFA US LARGE CAP VALUE	COST	195,512.	230,350.
2883.96 SHS DFA US SMALL CAP	COST	64,912.	101,025.
10842.784 SHS DELAWARE VALUE INSTL	COST	196,580.	243,095.
5364.614 SHS JPMORGAN CAP GROWTH SELECT	COST	122,588.	217,964.
918.773 SHS VANGUARD REIT INDEX ADM	COST	114,404.	120,892.
3529.706 SHS VANGUARD GROWTH INDEX ADM	COST	160,870.	331,228.
11656.732 SHS DODGE & COX INCOME FUND	COST	157,044.	163,544.

4508.666 SHS PALMER SQUARE INCOME	COST		
PLUS		44,629.	44,636.
10393.314 SHS LAZARD US CORP INCOME	COST		
PORTFOLIO INSTITUTIONAL SHARE FUND		50,927.	51,135.
2690.026 SHS OPPENHEIMER DEVELOPING	COST		
MARKETS		93,100.	122,638.
1942.926 SHS T ROWE PRICE MID-CAP	COST		
GROWTH		153,902.	185,180.
7106.98 SHS GUGGENHEIM TOTAL RETURN	COST		
BOND		191,036.	192,741.
33537.109 SHS EATON VANCE FLOATING	COST		
RATE I		301,499.	296,804.
14615.992 SHS FIDELITY US BOND	COST		
INDEX FUND		163,982.	174,077.
3012.164 SHS AMERICAN FUNDS	COST		
EUROPACIFIC GR		156,000.	167,055.
3111.288 SHS BWG CLEARBRIDGE INTL	COST		
GROWTH FUND CLASS IS		156,000.	169,565.
TOTAL TO FORM 990-PF, PART II, LINE 13		2,322,985.	2,811,929.

FORM 990-PF	OTHER ASSETS	STATEMENT	9
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DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
ACCRUED DIVIDEND RECEIVABLE	3,439.	2,106.	2,106.
TO FORM 990-PF, PART II, LINE 15	3,439.	2,106.	2,106.

FORM 990-PF PART VIII - LIST OF OFFICERS, DIRECTORS STATEMENT 10
 TRUSTEES AND FOUNDATION MANAGERS

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
JENNIFER SALAZAR 634 15TH STREET DANVILLE, PA 17821	CO-TRUSTEE 0.10	0.	0.	0.
LAURENCE POLSKY 12120 ALHAMBRA LEAWOOD, KS 66209	CO-TRUSTEE 0.10	0.	0.	0.
ELLEN GINSBURG POLSKY 12120 ALHAMBRA LEAWOOD, KS 66209	CO-TRUSTEE 0.10	0.	0.	0.
KAREN POLSKY KENT 62 CORRAL DRIVE CARBONDALE, CO 81623	CO-TRUSTEE 0.10	0.	0.	0.
STEVEN POLSKY 2616 ELLERHORST AVENUE EL CERRITO, CA 94530	CO-TRUSTEE 0.10	<i>STMT</i> <i>6</i>	0.	0.
AUTUMN KENT DESIMONE 57 CORRAL DRIVE CARBONDALE, CO 81623	CO-TRUSTEE 0.10	0.	0.	0.
RENEE POLSKY SILVER 12222 BEVERLY STREET OVERLAND PARK, KS 66209	CO-TRUSTEE 0.10	0.	0.	0.
JOSEPH POLSKY 12120 ALHAMBRA LEAWOOD, KS 66209	CO-TRUSTEE 0.10	0.	0.	0.
LARRY SILVER 12222 BEVERLY STREET OVERLAND PARK, KS 66209	CO-TRUSTEE 0.10	0.	0.	0.
ADRIAN SALAZAR 634 15TH STREET DANVILLE, PA 17821	CO-TRUSTEE 0.10	0.	0.	0.
MARK OLIVER 2616 ELLERHORST AVENUE EL CERRITO, CA 94530	CO-TRUSTEE 0.10	<i>STMT</i> <i>6</i>	0.	0.

NORMAN & ELAINE POLSKY FAMILY CHARITABLE

48-1232337

MAGNUS GRIMMETT
57 CORRAL DRIVE
CARBONDALE, CO 81623

CO-TRUSTEE
0.10

0. 0. 0.

TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII

0. 0. 0.

FORM 990-PF	GRANT APPLICATION SUBMISSION INFORMATION	STATEMENT	11
	PART XV, LINES 2A THROUGH 2D		

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

ROBERT J. O'HALLORAN
4801 WEST 110TH STREET, SUITE 150
OVERLAND PARK, KS 66211

TELEPHONE NUMBER

913-341-8500

FORM AND CONTENT OF APPLICATIONS

BRIEF LETTER FORMAT STATING GENERAL NATURE, GOALS AND PURPOSE OF REQUESTING ORGANIZATION.

ANY SUBMISSION DEADLINES

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

RESTRICTIONS AND LIMITATIONS ON AWARDS

NO RESTRICTIONS EXCEPT THAT THE ORGANIZATION IS TAX-EXEMPT UNDER IRS 501(C)(3).