

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

OMB No 1545-0047

2019

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

- 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.

For calendar year **2019** or tax year beginning , **2019**, and ending , **20**Name of foundation **GEORGE F & ELAH P EVANS FOUNDATION TR**

XXXXXXXX7-PF

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

Room/suite

10 S DEARBORN IL1-0111

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

CHICAGO, IL 60603

G Check all that apply:

☐ Initial return☐ Final return☐ Address change☐ Initial return of a former public charity☐ Amended return☐ Name change

H Check type of organization:

☐ Section 501(c)(3) exempt private foundation☒ Section 4947(a)(1) nonexempt charitable trust☐ Other taxable private foundationI Fair market value of all assets at
end of year (from Part II, col. (c), line
16) ► \$ 1,590,775.J Accounting method: ☒ Cash ☐ Accrual
☐ Other (specify) _____

(Part I, column (d), must be on cash basis)

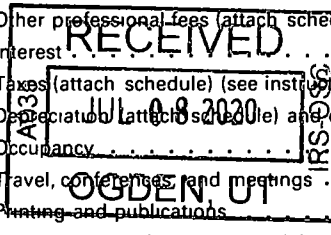
Part I Analysis of Revenue and Expenses (The
total of amounts in columns (b), (c), and (d)
may not necessarily equal the amounts in
column (a) (see instructions))(a) Revenue and
expenses per
books(b) Net investment
income(c) Adjusted net
income(d) Disbursements
for charitable
purposes
(cash basis only)

1	Contributions, gifts, grants, etc., received (attach schedule)				
2	Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B.				
3	Interest on savings and temporary cash investments.				
4	Dividends and interest from securities	36,435.	36,411.		STMT 1
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	60,164.			
b	Gross sales price for all assets on line 6a	60,166.			
7	Capital gain net income (from Part IV, line 2)		60,164.		
8	Net short-term capital gain				
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less: Cost of goods sold				
c	Gross profit or (loss) (attach schedule)				
11	Other income (attach schedule)	378.			STMT 2
12	Total. Add lines 1 through 11	96,977.	96,575.		
13	Compensation of officers, directors, trustees, etc.	26,919.	17,298.		9,621.
14	Other employee salaries and wages		NONE	NONE	
15	Pension plans, employee benefits		NONE	NONE	
16a	Legal fees (attach schedule)				
b	Accounting fees (attach schedule)				
c	Other professional fees (attach schedule)				
17	Interest				
18	Taxes (attach schedule) (see instructions)	25,347.	4,868.		
19	Depreciation (attach schedule) and depletion				
20	Occupancy				
21	Travel, conferences, and meetings		NONE	NONE	
22	Printing and publications		NONE	NONE	
23	Other expenses (attach schedule)				
24	Total operating and administrative expenses Add lines 13 through 23.	52,266.	22,166.	NONE	9,621.
25	Contributions, gifts, grants paid	70,635.			70,635.
26	Total expenses and disbursements. Add lines 24 and 25	122,901.	22,166.	NONE	80,256.
27	Subtract line 26 from line 12				
a	Excess of revenue over expenses and disbursements	-25,924.			
b	Net investment income (if negative, enter -0-)		74,409.		
c	Adjusted net income (if negative, enter -0-)				

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POSTMARK DATE JUL 06 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 (See instructions)		
		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	10,245.	14,964.	14,964.
	2 Savings and temporary cash investments	40,813.	15,511.	15,511.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶			
	Less: allowance for doubtful accounts ▶	NONE		
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U S and state government obligations (attach schedule)			
	b Investments - corporate stock (attach schedule) . STMT 5	974,074.	942,101.	1,223,779.
	c Investments - corporate bonds (attach schedule) . STMT 9	229,369.	254,904.	261,880.
	11 Investments - land, buildings, and equipment basis			
Less: accumulated depreciation (attach schedule) ▶				
12 Investments - mortgage loans				
13 Investments - other (attach schedule) STMT 10	73,655.	74,811.	74,641.	
14 Land, buildings, and equipment basis				
Less: accumulated depreciation (attach schedule) ▶				
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	1,328,156.	1,302,291.	1,590,775.	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶)			
23 Total liabilities (add lines 17 through 22)		NONE		
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ <input type="checkbox"/> 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 ▶ <input checked="" type="checkbox"/> and complete lines 26 through 30			
	26 Capital stock, trust principal, or current funds	1,328,156.	1,302,291.	
	27 Paid-in or capital surplus, or land, bldg, and equipment fund			
	28 Retained earnings, accumulated income, endowment, or other funds			
29 Total net assets or fund balances (see instructions)	1,328,156.	1,302,291.		
30 Total liabilities and net assets/fund balances (see instructions)	1,328,156.	1,302,291.		

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 29 (must agree with end-of-year figure reported on prior year's return)	1	1,328,156.
2 Enter amount from Part I, line 27a	2	-25,924.
3 Other increases not included in line 2 (itemize) ▶ 2018 TRANSACTION POSTED IN 2019	3	1,447.
4 Add lines 1, 2, and 3	4	1,303,679.
5 Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 11	5	1,388.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29	6	1,302,291.

**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)
1 a PUBLICLY TRADED SECURITIES					
b					
c					
d					
e					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))		
a 60,166.		2.	60,164.		
b					
c					
d					
e					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69					
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col. (k), but not less than -0-) or Losses (from col (h))		
a			60,164.		
b					
c					
d					
e					
2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }			2	60,164.	
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c). See instructions If (loss), enter -0- in Part I, line 8 }			3		

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2018	76,420.	1,567,530.	0.048752
2017	68,559.	1,500,157.	0.045701
2016	74,743.	1,388,147.	0.053844
2015	78,893.	1,515,840.	0.052046
2014	72,566.	1,586,172.	0.045749
2 Total of line 1, column (d)			2 0.246092
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years			3 0.049218
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5			4 1,517,436.
5 Multiply line 4 by line 3.			5 74,685.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 744.
7 Add lines 5 and 6			7 75,429.
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.			8 80,256.



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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary - see instructions)		1	744.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		2	NONE
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations, enter 4% of Part I, line 12, col (b)		3	744.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)		4	1,901.
3 Add lines 1 and 2		5	
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)		6	
5 Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0-		7	NONE
6 Credits/Payments		8	
a 2019 estimated tax payments and 2018 overpayment credited to 2019	6a		
b Exempt foreign organizations - tax withheld at source	6b	NONE	
c Tax paid with application for extension of time to file (Form 8868)	6c	NONE	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments Add lines 6a through 6d	7		NONE
8 Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		NONE
11 Enter the amount of line 10 to be Credited to 2020 estimated tax <input type="checkbox"/> NONE <input checked="" type="checkbox"/> Refunded <input type="checkbox"/> NONE <input checked="" type="checkbox"/>	11		NONE

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation <input checked="" type="checkbox"/> \$ _____ (2) On foundation managers <input checked="" type="checkbox"/> \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input checked="" type="checkbox"/> \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by <i>General Instruction T</i> .		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered See instructions <input checked="" type="checkbox"/> WV		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by <i>General Instruction G</i> ? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2019 or the tax year beginning in 2019? See 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

**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		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		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>N/A</u>	X	
14 The books are in care of ► <u>JP MORGAN CHASE BANK, N.A.</u> Telephone no ► <u>(800) 496-2583</u> Located at ► <u>10 S DEARBORN ST; MC; IL 1-0111, CHICAGO, IL</u> ZIP+4 ► <u>60603</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 ► <u>15</u>		
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?		X
See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►		

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required**File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.**

	Yes	No
1a During the year, did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception: Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions		X
Organizations relying on a current notice regarding disaster assistance, check here ► <input type="checkbox"/>		
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2019?		X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2019, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2019?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
If "Yes," list the years ► _____		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions)		
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► _____		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 2019 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019.)		
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		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?		X

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

	Yes	No
5a During the year, did the foundation pay or incur any amount to:		
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions		
Organizations relying on a current notice regarding disaster assistance, check here	<input type="checkbox"/>	
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	<input type="checkbox"/> Yes <input type="checkbox"/> No	
If "Yes," attach the statement required by Regulations section 53.4945-5(d)		
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		
If "Yes" to 6b, file Form 8870		
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?		
8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1 List all officers, directors, trustees, and foundation managers and their compensation. See instructions.**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
JP MORGAN CHASE BANK, N.A. 10 S DEARBORN ST, MC; IL 1-0111, CHICAGO, IL 60603	TRUSTEE 2	26,919.	-0-	-0-

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

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

Total number of other employees paid over \$50,000 **NONE**

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

Part IX-A Summary of Direct Charitable Activities

Expenses

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

Amount

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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	1,516,635.
b	Average of monthly cash balances	1b	23,909.
c	Fair market value of all other assets (see instructions).	1c	NONE
d	Total (add lines 1a, b, and c)	1d	1,540,544.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	NONE
3	Subtract line 2 from line 1d.	3	1,540,544.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	23,108.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,517,436.
6	Minimum investment return. Enter 5% of line 5	6	75,872.

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	75,872.
2a	Tax on investment income for 2019 from Part VI, line 5	2a	
b	Income tax for 2019 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	75,872.
4	Recoveries of amounts treated as qualifying distributions.	4	NONE
5	Add lines 3 and 4	5	75,872.
6	Deduction from distributable amount (see instructions).	6	NONE
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	75,872.

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	80,256.
b	Program-related investments - total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	NONE
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	NONE
b	Cash distribution test (attach the required schedule)	3b	NONE
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	80,256.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions.	5	744.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	79,512.

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				75,872.
2 Undistributed income, if any, as of the end of 2019				
a Enter amount for 2018 only.			70,635.	
b Total for prior years 20____, 20____, 20____		NONE		
3 Excess distributions carryover, if any, to 2019				
a From 2014	NONE			
b From 2015	NONE			
c From 2016	NONE			
d From 2017	NONE			
e From 2018	NONE			
f Total of lines 3a through e	NONE			
4 Qualifying distributions for 2019 from Part XII, line 4 ▶ \$ 80,256.				
a Applied to 2018, but not more than line 2a . . .			70,635.	
b Applied to undistributed income of prior years (Election required - see instructions)		NONE		
c Treated as distributions out of corpus (Election required - see instructions)	NONE			
d Applied to 2019 distributable amount.				9,621.
e Remaining amount distributed out of corpus. . .	NONE			
5 Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount must be shown in column (a))	NONE			NONE
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	NONE			
b Prior years' undistributed income Subtract line 4b from line 2b.		NONE		
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		NONE		
d Subtract line 6c from line 6b Taxable amount - see instructions		NONE		
e Undistributed income for 2018. Subtract line 4a from line 2a Taxable amount - see instructions				
f Undistributed income for 2019 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2020.				66,251.
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)	NONE			
8 Excess distributions carryover from 2014 not applied on line 5 or line 7 (see instructions) . . .	NONE			
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a	NONE			
10 Analysis of line 9				
a Excess from 2015 . . .	NONE			
b Excess from 2016 . . .	NONE			
c Excess from 2017 . . .	NONE			
d Excess from 2018 . . .	NONE			
e Excess from 2019 . . .	NONE			

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

NOT APPLICABLE

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

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

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

[illegible]

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

1 Information Regarding Foundation Managers:

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

N/A

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

N/A

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

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

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

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

c Any submission deadlines

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

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

<div>Recipient</div> <div>Name and address (home or business)</div>	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				
LOUIS BENNETT PUBLIC LIBRARY 148 COURT AVE Weston WV 26452	NONE	PC	GENERAL	17,000.
HEALTH ACCESS INC 489 WASHINGTON AVE Clarksburg WV 26301	NONE	PC	GENERAL	26,000.
SOUTHERN AREA PUBLIC LIBRARY MAIN ST & CHURCH CIR Lost Creek WV 26385	NONE	PC	GENERAL	5,000.
SUSAN DEW HOFF MEMORIAL CLINIC, INC. 925 LIBERTY AVE West Milford WV 26451	NONE	PC	GENERAL	22,635.
Total			3a	70,635.
b Approved for future payment				
Total			3b	

		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.		

[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

**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.

Krystal Zec

04/04/2020
Date

► Vice President
Title

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

**Paid
Preparer
Use Only**

Print/Type preparer's name

JACOB ZEHNDER

Preparer's signature

Ch. 22

Date

04/04/2020

Check ☐ if self-employed

PTIN

P01564049

Firm's name ▶ ERNST & YOUNG U.S. LLP

Firm's EIN	▶ 34-6565596
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Firm's address ► 155 N WACKER DRIVE
CHICAGO, IL

60606

Phone no 312-879-2000

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----
USGI REPORTED AS NONQUALIFIED DIVIDENDS	1,374.	1,374.
FOREIGN DIVIDENDS	9,377.	9,377.
NONDIVIDEND DISTRIBUTIONS	24.	
DOMESTIC DIVIDENDS	15,009.	15,009.
NONQUALIFIED FOREIGN DIVIDENDS	4,211.	4,211.
NONQUALIFIED DOMESTIC DIVIDENDS	5,858.	5,858.
SECTION 199A DIVIDENDS	38.	38.
CORPORATE INTEREST	544.	544.
	-----	-----
TOTAL	36,435.	36,411.
	=====	=====



GEORGE F & ELAH P EVANS FOUNDATION TR

57-6218604

FORM 990PF, PART I - OTHER INCOME
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----
FEDERAL TAX REFUND	378.
TOTALS	----- 378. =====

FORM 990PF, PART I - TAXES
=====

DESCRIPTION -----	REVENUE AND EXPENSES PER BOOKS -----	NET INVESTMENT INCOME -----
FOREIGN TAXES	8.	8.
STATE INCOME TAXES	4,015.	4,015.
FEDERAL TAX PAYMENT - PRIOR YE	20,479.	
FOREIGN TAXES ON QUALIFIED FOR	740.	740.
FOREIGN TAXES ON NONQUALIFIED	105.	105.
	-----	-----
TOTALS	25,347.	4,868.
	=====	=====



GEORGE F & ELAH P EVANS FOUNDATION TR

57-6218604

FORM 990PF, PART I - OTHER EXPENSES

=====

DESCRIPTION

REVENUE
AND
EXPENSES
PER BOOKS

OTHER EXPENSE (NON-DEDUCTIBLE)

TOTALS

GEORGE F & ELAH P EVANS FOUNDATION TR
FORM 990PF, PART II - CORPORATE STOCK
=====

57-6218604

DESCRIPTION -----	ENDING BOOK VALUE		ENDING FMV	
	-----		---	
00724F101 ADOBE INC.	442.		3,298.	
02079K107 ALPHABET INC-CL C	6,071.		12,033.	
02079K305 ALPHABET INC-CL A	3,257.		5,358.	
023135106 AMAZON.COM INC	4,348.		12,935.	
032654105 ANALOG DEVICES INC				
037833100 APPLE INC	4,013.		15,857.	
04314H402 ARTISAN INTERNATIONALA				
04314H857 ARTISAN INTL VALUE F				
060505104 BANK OF AMERICA CORP	3,555.		5,776.	
084670702 BERKSHIRE HATHAWAY I	4,563.		5,210.	
09062X103 BIOGEN INC				
101137107 BOSTON SCIENTIFIC CO	2,087.		4,567.	
110122108 BRISTOL-MYERS SQUIBB	3,298.		3,787.	
151020104 CELGENE CORP				
16119P108 CHARTER COMMUNICATIO	3,262.		5,336.	
172967424 CITIGROUP INC	4,264.		5,672.	
20030N101 COMCAST CORP-CLASS A	5,485.		6,251.	
247361702 DELTA AIR LINES INC				
25278X109 DIAMONDBACK ENERGY I	1,975.		1,764.	
254687106 WALT DISNEY CO/THE	2,505.		3,326.	
256206103 DODGE & COX INTL STO				
256746108 DOLLAR TREE INC				
26078J100 DOWDUPONT INC				
26875P101 EOG RESOURCES INC	3,756.		3,602.	
277432100 EASTMAN CHEMICAL CO				
30303M102 FACEBOOK INC-CLASS A	2,056.		3,695.	
31620M106 FIDELITY NATIONAL IN	2,445.		4,451.	
369550108 GENERAL DYNAMICS COR	2,884.		2,998.	
375558103 GILEAD SCIENCES INC				

GEORGE F & ELAH P EVANS FOUNDATION TR
FORM 990PF, PART II - CORPORATE STOCK
=====

57-6218604

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
-----	-----	---
437076102 HOME DEPOT INC	1,563.	5,241.
438516106 HONEYWELL INTERNATIO	2,863.	7,080.
45866F104 INTERCONTINENTAL EXC	933.	1,481.
464287465 ISHARES MSCI EAFE ET	75,391.	88,397.
46432F842 ISHARES CORE MSCI EA	86,233.	91,793.
48129C207 JPM GL RES ENH IDX F	49,888.	58,257.
493267108 KEYCORP	2,276.	2,854.
532457108 ELI LILLY & CO	2,578.	4,337.
548661107 LOWE'S COS INC	562.	3,353.
57636Q104 MASTERCARD INC - A	1,811.	8,361.
58933Y105 MERCK & CO. INC.	4,022.	5,184.
594918104 MICROSOFT CORP	5,248.	20,028.
609207105 MONDELEZ INTERNATION	2,591.	3,745.
617446448 MORGAN STANLEY	3,753.	5,879.
65339F101 NEXTERA ENERGY INC	2,365.	3,632.
65473P105 NISOURCE INC		
655844108 NORFOLK SOUTHERN COR	3,684.	4,853.
666807102 NORTHROP GRUMMAN COR	3,824.	4,472.
67066G104 NVIDIA CORP	4,158.	3,765.
67103H107 O'REILLY AUTOMOTIVE	1,260.	2,191.
674599105 OCCIDENTAL PETROLEUM		
713448108 PEPSICO INC	3,701.	5,057.
717081103 PFIZER INC	4,854.	5,407.
718172109 PHILIP MORRIS INTERN	1,692.	1,617.
723787107 PIONEER NATURAL RESO	2,888.	3,027.
78462F103 SPDR S&P 500 ETF TRU	136,797.	223,049.
78486Q101 SVB FINANCIAL GROUP		
808513105 SCHWAB (CHARLES) COR		
854502101 STANLEY BLACK & DECK	2,007.	3,646.

GEORGE F & ELAH P EVANS FOUNDATION TR
FORM 990PF, PART II - CORPORATE STOCK
=====

57-6218604

DESCRIPTION -----	ENDING BOOK VALUE		ENDING FMV	
	-----		---	
882508104 TEXAS INSTRUMENTS IN	3,000.		5,516.	
907818108 UNION PACIFIC CORP	3,497.		5,424.	
913017109 UNITED TECHNOLOGIES	1,598.		1,947.	
91324P102 UNITEDHEALTH GROUP I	3,406.		10,289.	
92532F100 VERTEX PHARMACEUTICA	1,206.		2,190.	
92826C839 VISA INC-CLASS A SHA	1,531.		3,758.	
94106B101 WASTE CONNECTIONS IN	1,232.		2,179.	
949746101 WELLS FARGO & CO	2,925.		2,851.	
96208T104 WEX INC	1,015.		2,304.	
98956P102 ZIMMER BIOMET HOLDIN	4,091.		5,388.	
G0176J109 ALLEGION PLC	1,389.		2,615.	
G1151C101 ACCENTURE PLC-CL A	992.		2,316.	
G6095L109 APTIV PLC				
H1467J104 CHUBB LTD	2,272.		4,047.	
025816109 AMERICAN EXPRESS CO	3,959.		4,357.	
053015103 AUTOMATIC DATA PROCE	2,977.		3,409.	
191216100 COCA-COLA CO/THE	2,184.		2,712.	
285512109 ELECTRONIC ARTS INC	3,015.		3,548.	
315911750 FIDELITY 500 INDEX F	76,605.		94,864.	
701094104 PARKER HANNIFIN CORP				
744320102 PRUDENTIAL FINANCIAL	2,161.		3,143.	
778296103 ROSS STORES INC				
981558109 WORLDPAY INC CL A	1,369.		1,511.	
988498101 YUMJ BRANDS INC	983.		6,320.	
11135F101 BROADCOM INC	46,104.		49,835.	
46641Q696 JPMORGAN BETABUILDER	32,467.		32,614.	
46641Q712 JPMORGAN BETABUILDER	5,204.		4,338.	
56585A102 MARATHON PETROLEUM C	2,938.		2,589.	
64110L106 NETFLIX INC				

GEORGE F & ELAH P EVANS FOUNDATION TR
 FORM 990PF, PART II - CORPORATE STOCK
 =====

57-6218604

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
-----	-----	---
70450Y103 PAYPAL HOLDINGS INC	3,348.	4,110.
79466L302 SALESFORCE.COM INC	4,762.	5,367.
83002G306 SIX CIRCLES U.S. UNC	150,687.	167,482.
83002G405 SIX CIRCLES INTERNAT	75,768.	78,359.
G5494J103 LINDE PLC	6,413.	7,877.
G5960L103 MEDTRONIC PLC		
00287Y109 ABBVIE INC	3,774.	4,250.
015351109 ALEXION PHARMACEUTIC	1,482.	1,190.
22052L104 CORTEVA INC	1,943.	1,833.
26614N102 DUPONT DE NEMOURS IN	3,245.	2,247.
337738108 FISERV INC	6,017.	7,747.
580135101 MCDONALD'S CORP	2,413.	2,371.
742718109 PROCTER & GAMBLE CO/	3,309.	3,872.
747525103 QUALCOMM INC	1,557.	1,588.
N6596X109 NXP SEMICONDUCTORS N	2,055.	2,800.
	-----	-----
TOTALS	942,101.	1,223,779.
	=====	=====

GEORGE F & ELAH P EVANS FOUNDATION TR
FORM 990PF, PART II - CORPORATE BONDS
=====

57-6218604

DESCRIPTION -----	ENDING BOOK VALUE -----	ENDING FMV ----
921937603 VANGUARD TOTAL BOND	73,241.	77,288.
92203J308 VANGUARD TOTAL INTL	103,150.	105,593.
722005816 PIMCO INVESTMENT GRA		
921937827 VANGUARD SHORT-TERM	29,593.	30,092.
54401E143 LORD ABBETT SHRT DUR	15,579.	15,547.
83002G108 SIX CIRCLES ULTRA SH	16,080.	15,174.
464287432 ISHARES 20+ YEAR TRE	17,261.	18,186.
464287440 ISHARES 7-10 YEAR TR		
	-----	-----
TOTALS	254,904.	261,880.
	=====	=====

GEORGE F & ELAH P EVANS FOUNDATION TR

57-6218604

FORM 990PF, PART II - OTHER INVESTMENTS

=====

DESCRIPTION	COST/ FMV C OR F	ENDING BOOK VALUE	ENDING FMV
-----	-----	-----	----
12628J881 CRM LNG/SHRT OPPORT-	C	15,026.	15,578.
09257V508 BLACKSTONE ALT MULTI	C	45,288.	44,941.
25264S833 DIAMOND HILL LONG/SH	C		
29446A710 EQUINOX IMP SYSTEM M	C	7,414.	7,231.
09250J734 BLACKROCK EVNT DRVN	C	7,083.	6,891.
		-----	-----
TOTALS		74,811.	74,641.
		=====	=====



GEORGE F & ELAH P EVANS FOUNDATION TR

57-6218604

FORM 990PF, PART III - OTHER DECREASES IN NET WORTH OR FUND BALANCES

=====

DESCRIPTION

AMOUNT

RETURN OF CAPITAL ADJUSTMENT
2019 TRANSACTION POSTED IN 2020
SALES FOUND UPDATES
ROUNDING

31.
1,349.
6.
2.

TOTAL

1,388.
=====