EXTENDED TO MAY 15, 2017 Return of Private Foundation

OMB No 1545-0052

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.

▶ Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

For	alen	dar year 2015 or tax year beginning JUI	1, 2015	, and ending	JUN 30, 2016	5
Na	ne of	foundation			A Employer identificatio	n number
I	NV)	ESTORS FOUNDATION, INC.			20-374385	7
Nur	nber a	nd street (or P O box number if mail is not delivered to stree	t address)	Room/suite	<b>B</b> Telephone number	
_1	01	JOHN F. KENNEDY PARKWA	<u> </u>		973-376-53	100
City	or to	own, state or province, country, and ZIP or foreign p	postal code		C If exemption application is	pending, check here
_S	HO	RT HILLS, NJ 07078				
G (	heck	all that apply: Initial return	Initial return of a f	ormer public charity	D 1. Foreign organization	ns, check here
		Final return	Amended return		2 5	
		Address change	Name change		Foreign organizations m check here and attach of	computation
H (		type of organization: X Section 501(c)(3) e	xempt private foundation		E If private foundation st	atus was terminated
<u></u>		ction 4947(a)(1) nonexempt charitable trust	Other taxable private found	ation	under section 507(b)(	1)(A), check here $ ightharpoonup$
1 Fa	ıır ma	, ,	ing method: X Cash	Accrual	F If the foundation is in a	60-month termination
			ther (specify)		under section 507(b)(	i)(B), check here
	\$	61,040,456. (Part I, cold	ımn (d) must be on cash	basis)		<del></del>
P	<u>irt l</u>	Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not	(a) Revenue and	(b) Net investment	(c) Adjusted net	(d) Disbursements for charitable purposes
		necessarily equal the amounts in column (a) )	expenses per books	income	income	(cash basis only)
	1	Contributions, gifts, grants, etc., received		ļ	N/A	-
		Check X if the foundation is not required to attach Sch. B Interest on savings and temporary			<del> </del>	<u> </u>
ر مع	3	cash investments	5,614.	5,614.		STATEMENT 1
2017,	1	Dividends and interest from securities	994,745.	994,745.		STATEMENT 2
	5a	Gross rents		<del></del>		<del> </del>
2	۱.	Net rental income or (loss)	1 000 650			
<b>≥</b> e	6a	Net gain or (loss) from sale of assets not on line 10  Gross sales price for all assets on line 6a  2,99REGEN	1,098,650.	<del> </del>	<u> </u>	<del></del>
ĒĒ	_ b			1 000 650	<del> </del>	<del></del>
AFK ( Revenue		Capital gain net income (from Part IV (line 2)		1,098,650.		<del></del>
<u>-</u>	8	Net short-term capital gain of lincome modifications MAR 2 \$ 3	2017 10	<del> </del>		<del> </del>
ララス	Į.	Gross sales less returns	2017 S	<u> </u>		<del></del>
É.	١	and allowances Less Cost of goods sold CGDEN		<del> </del>		<del></del>
ي رو	l	Gross profit or (loss)			<del></del>	
)	11	Other income	122,000.	0.	<del> </del>	STATEMENT 3
	12	Total. Add lines 1 through 11	2,221,009.	2,099,009.	<del> </del>	STATEMENT 3
	13	Compensation of officers, directors, trustees, etc	87,000.	0.		87,000.
	14	Other employee salaries and wages	07,000.	ļ		07,000.
		Pension plans, employee benefits				
es	i	Legal fees				<del></del>
ens	}	Accounting fees STMT 4	6,000.	1,500.	<del>                                     </del>	4,500.
ă	1	Other professional fees STMT 5	46,010.			46,010.
é E	1	Interest		<del> </del>		
and Administrative Expense	1	Taxes STMT 6	25,000.	0.		0.
istr	19	Depreciation and depletion				
n L	20	Occupancy				
Ad		Travel, conferences, and meetings	1,325.	0.		1,325.
pu	22	Printing and publications				<u> </u>
Ď.	1	Other expenses STMT 7	22,698.	0.		22,415.
Operating	24	Total operating and administrative				
bec		expenses Add lines 13 through 23	188,033.	1,500.		161,250.
Ō	25	Contributions, gifts, grants paid	4,163,284.			4,163,284.
1		Total expenses and disbursements				
		Add lines 24 and 25	4,351,317.	1,500.		4,324,534.
	27	Subtract line 26 from line 12;				
		Excess of revenue over expenses and disbursements	-2,130,308			
	1	Net investment income (if negative, enter -0-)		2,097,509.	,	
	С	Adjusted net income (if negative, enter -0-)			N/A	

rui	111 95	10-PF (2015) INVESTORS FOUNDATION, IT	NC.		3/4385/ Page 2
P	art	Balance Sheets Attached schedules and amounts in the description column should be for end-of year amounts only	Beginning of year	End o	
<u>.</u>		Column should be for end-of year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing	3,676.	2,477.	2,477.
	2	Savings and temporary cash investments	7,441,618.	7,205,310.	7,205,310.
	3	Accounts receivable ►			
	1	Less: allowance for doubtful accounts ▶			
	4	Pledges receivable ▶			
		Less: allowance for doubtful accounts ▶			
	5	Grants receivable			
	l -	Receivables due from officers, directors, trustees, and other			<del> </del>
	"	disqualified persons			
	7	Other notes and loans receivable	<del></del>	<del></del>	<del> </del>
	(				
		Less. allowance for doubtful accounts ▶		<del></del>	<del></del>
Assets		Inventories for sale or use			<del></del>
155	1	Prepaid expenses and deferred charges			
	1	Investments - U.S. and state government obligations	<del></del>		
	l	Investments - corporate stock STMT 8	24,941,366.	23,048,565.	53,832,669.
	C	Investments - corporate bonds			
	11	investments - land, buildings, and equipment basis			
		Less accumulated depreciation			
	12	Investments - mortgage loans			
	13	Investments - other			
	14	Land, buildings, and equipment: basis ►			
		Less accumulated depreciation ▶ 18,866.			
	15	Other assets (describe ►			
	1	Total assets (to be completed by all filers - see the			
		instructions. Also, see page 1, item I)	32,386,660.	30,256,352.	61,040,456.
_	17	Accounts payable and accrued expenses	32,300,000.	30,230,332.	01,040,430.
	18	Grants payable			
	ļ	Deferred revenue			
Liabilities	19	To the second		<del></del>	
E	20	Loans from officers, directors, trustees, and other disqualified persons			
<u></u>	21	Mortgages and other notes payable			
_	22	Other liabilities (describe			
_	23	Total liabilities (add lines 17 through 22)	0.	0.	
	ĺ	Foundations that follow SFAS 117, check here		,	
S		and complete lines 24 through 26 and lines 30 and 31			
Net Assets or Fund Balances	24	Unrestricted	32,386,660.	30,256,352.	Į
lan	25	Temporarily restricted			
æ	26	Permanently restricted			
Pur		Foundations that do not follow SFAS 117, check here			
Ę		and complete lines 27 through 31			
ō	27	Capital stock, trust principal, or current funds	{		
set	28	Paid-in or capital surplus, or land, bldg., and equipment fund			1
As	29	Retained earnings, accumulated income, endowment, or other funds			1
et	30	Total net assets or fund balances	32,386,660.	30,256,352.	1
Z		, , , , , , , , , , , , , , , , , , ,	32/300/0001	30/130/331	1
	31	Total liabilities and net assets/fund balances	32,386,660.	30,256,352.	
_				30,230,332.	<del></del>
Р	art	Analysis of Changes in Net Assets or Fund Ba	alances		
1	Total	net assets or fund balances at beginning of year - Part II, column (a), line	30	· .	
		st agree with end-of-year figure reported on prior year's return)		1	32,386,660.
		r amount from Part I, line 27a		2	-2,130,308.
		r increases not included in line 2 (itemize)		3	0.
		lines 1, 2, and 3		4	30,256,352.
-		eases not included in line 2 (itemize)		5	0.
		net assets or fund balances at end of year (line 4 minus line 5) - Part II, co	dump (b) line 20	6	30,256,352.
0_	iold	i not assets of fund balances at end of year finite 4 fillings line 37 - Part II, Co	numin (D), iitle 30		50, 430, 334.

Part IV   Capital Gains a	and Losses for Tax on Ir	nvestment	Income						
(a) List and descr 2-story brick wai	ibe the kind(s) of property sold (e g rehouse; or common stock, 200 sh	, real estate, s. MLC Co.)		( <b>6)</b>	low acquire - Purchase - Donation	ed (c	) Date aco (mo., day,	quired , yr.)	( <b>d)</b> Date sold (mo., day, yr.)
1a 267000 SHS INVI	ESTORS BANCORP				P				03/17/16
<u>b</u>				<u> </u>					
<u>d</u>									
(e) Gross sales price	(f) Depreciation allowed (or allowable)		t or other basis xpense of sale	•			(h) Gain (e) plus (f	or (loss ) minus	(g)
a 2,991,451.			1,892,80	1.					1,098,650.
_b		ļ							
<u>c</u>		<del> </del>							
<u>d</u>		<del> </del>							
Complete only for assets showing	g gain in column (h) and owned by	the foundation	on 12/31/69	$\neg \dagger$		(I) G	ains (Col.	(h) nain	minus
	(j) Adjusted basis	T	cess of col. (i)	$\neg$		còl. (l	c), but not	less tha	n -0-) or
(i) F M V. as of 12/31/69	as of 12/31/69		col. (j), if any				osses (fr	om col.	(n)) 
<u>a</u>		L							1,098,650.
<u>b</u>		<u> </u>							
C		ļ							
<u>d</u>									
<u>e</u>	C If gave also sate			-					
2 Capital gain net income or (net cap	oital loss) $\begin{cases} If gain, also ente \\ If (loss), enter -C \end{cases}$	r in Part I, line )- in Part I, line	<i>1</i> 7	<b>}</b>	2				1,098,650.
3 Net short-term capital gain or (los			•						
If gain, also enter in Part I, line 8,		114 (0).		)					
If (loss), enter -0- in Part I, line 8			<del></del>		3			N/A	<u> </u>
<del></del>	nder Section 4940(e) for					t inco	me		
(For optional use by domestic private	foundations subject to the section	4940(a) tax on	net investment in	1come	€.)				
If section 4940(d)(2) applies, leave th	ıs part blank.								
Was the foundation liable for the secti	ion 4942 tax on the distributable an	nount of any ve	ar in the base per	riod?					Yes X No
If "Yes," the foundation does not quali		, ,							
1 Enter the appropriate amount in e	ach column for each year; see the i	nstructions be	fore making any e	ntries	i				
(a) Base period years Calendar year (or tax year beginnin			Net value of no		ritable-use		(d) Distribution ratio (col. (b) divided by col. (c))		
2014		4,973.			,738,				.060346
2013		2,229.		37	,200,	<u>888.</u>	<b>}</b>		.063230
2012		5,849.		$\frac{27}{21}$	,660,	<u> 187.</u>	<del> </del>		.033834
2011		76,590. 18,652.			,408,				.054959
2010		10,054.		40	,207,	934.	<del> </del>		.046945
2 Total of line 1, column (d)							2		.259314
3 Average distribution ratio for the 5	i-year base period - divide the total	on line 2 by 5,	or by the number	of ve	ears				
the foundation has been in exister	•			- ,-			3		.051863
4 Enter the net value of noncharitab	le-use assets for 2015 from Part X,	line 5					4	6	1,444,049.
				{					
5 Multiply line 4 by line 3			5		3,186,673.				
	(B. ) (B.)								20 075
6 Enter 1% of net investment incom	e (1% of Part I, line 27b)						6		20,975.
7 Add lines 5 and 6							7		3,207,648.
1 Mud mies D allu U									J/201/030.
8 Enter qualifying distributions from							8		4,324,534.
if line 8 is equal to or greater than See the Part VI instructions	line 7, check the box in Part VI, line	e 1b, and comp	lete that part usir	ng a 1	% tax rate.				

	n 990-PF (2015) INVESTORS FOUNDATION, INC. 20 - 374	3857 instru	ction	Page 4
	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)  Domestic foundations that meet the section 4940(e) requirements in Part V, check here  and enter 1%	2	0,9	75.
-	of Part I, line 27b		<u></u>	
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-)			0.
3	Add lines 1 and 2	<u>2</u>	0,9	<u>75.</u>
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			<u>0.</u>
	Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0-	2	<u>0,9</u>	75.
	Credits/Payments:			
	2015 estimated tax payments and 2014 overpayment credited to 2015			
	Exempt foreign organizations - tax withheld at source			
	Tax paid with application for extension of time to file (Form 8868)  6c 15,000.			
	Backup withholding erroneously withheld  Table and asserted Add less Catherine Cd	2	4 0	70
	Total credits and payments. Add lines 6a through 6d  Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached 8	3	4,9	<u>72.</u>
	Enter any penalty for underpayment of estimated tax. Check here I f Form 2220 is attached 8			
	Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	<u>_</u>	3 0	97.
	Enter the amount of line 10 to be: Credited to 2016 estimated tax   13,997. Refunded  11		3,5	0.
=	art VII-A Statements Regarding Activities			
	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in	7	Yes	No
	any political campaign?	1a		
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)?	1b		X
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or		(	
	distributed by the foundation in connection with the activities.		ĺ	
С	Did the foundation file Form 1120-POL for this year?	1c	ĺ	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.	1 1	1	
	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. > \$			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2	İ	X
	If "Yes," attach a detailed description of the activities		ĺ	İ
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		<u>x</u>
	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5	<u> </u>	<u>X</u>
	If "Yes," attach the statement required by General Instruction T		1	
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:			
	By language in the governing instrument, or		1	
	By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law			}
	remain in the governing instrument?	6	<u>X</u>	<del> </del>
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	7	X	<del> </del>
8a	Enter the states to which the foundation reports or with which it is registered (see instructions)   NJ	-		
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)	ĺ		
	of each state as required by General Instruction G? If "No," attach explanation	8b	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar		1	
	year 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)? If "Yes," complete Part XIV	9	<u> </u>	X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X
		Form <b>99</b> 0	J-PF	(2015)

1   All any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(1)(13)? If "Yes," attach scheduls (see instructions)   11	Pa	t VII-A Statements Regarding Activities (continued)			
section 512(b) (13)? If 1'es, statch schedule (see instructions)  10 did the foundation make a distribution to a donor advised fund over which the foundation or a disqualitied person had advisory privileges?  If Yes, attach statement (see instructions)  10 did the foundation comply with the public inspection requirements for its annual returns and exemption application?  11 The books are in care of books are in care of books. PARKWAY, SHORT HILLS, NJ  12 PARKWAY, SHORT HILLS, NJ  13 Section 4947(a)(1) nonesempt charitable trusts fining form 990-PF in lieu of Form 141-Check hare and where the amount of tax-exempt interest received for accrued during the year  15 Alay time during calendar year 2015, did the foundation have an interest in or a signature or other authority over a bank, section 4947(a)(1) nonesempt charitable for accrued during the year  16 Alay time during calendar year 2015, did the foundation have an interest in or a signature or other authority over a bank, section of the instructions for exceptions and filing requirements for FinCEN Form 114, If Yes, enter the name of the foundation of the foundation have an interest in or a signature or other authority over a bank, section of the foundation have an interest in or a signature or other authority over a bank, section of the foundation in a 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.  16 During the year dut he foundation elevel developed in directly;  17 Engage in the safe or exchange, or lessing of property with a doqualitied person?  18 Engage product, services, for feetingests (or accept them from) a disqualitied person?  19 Engage in the safe or exchange, or lessing of property with a doqualitied person?  19 Engage in the safe or exchange, or lessing of property with a doqualitied person?  19 Engage in the safe or exchange, or lessing of property with a doqualitied person?  19 Engage product, property to				Yes	No
12 Did the loundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges?  13 Did the loundation comply with the public inspection requirements for its animal returns and exemption application?  14 The books are in care of ▶ THE FOUNDATION  15 Not books are in care of ▶ THE FOUNDATION  16 Not books are in care of ▶ THE FOUNDATION  17 The books are in care of ▶ THE FOUNDATION  18 Section 487((3)) moresemplicatible trusts timing from 999-Fir in the ori Form 1041 - Check here and reter the amount of tax-exempli interest received or accrued during the year A dark where during calendary are 2015, did the foundation have an interest in or a signature or other authority over a bank, Section 487((3)) for different and account in a foreign country?  18 A dark where during calendary are 2015, did the foundation have an interest in or a signature or other authority over a bank, Section 487((3)) for the firenancial account in a foreign country?  19 Eart VIH. B Statements Regarding Activities for Which Form 4720 May Be Required  File Form 4720 if any item is checked in the "Yest column, unless an exception applies.  18 During the year did the foundation (either directly or indirectly):  19 Engage in the sale or exchange, or teaming of properly with a disqualified person?  20 Storow money from, lend money to, or otherwise started ured to (or accept it form) a disqualified person?  21 Firmish poods, services, or facilities to (or accept them from) a disqualified person?  22 Storow money from, lend money to, or otherwise started ured to (or accept it form) a disqualified person?  23 Firmish poods, services, or facilities to (or accept them from) a disqualified person?  24 Firmish poods, services, or facilities to (or accept them from) a disqualified person?  25 Firmish poods, services, or facilities to (or accept them from) a disqualified person?  26 Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  27 Firmish poods, services,	11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of		Ì	}
If Yes, a trach statemen (see instructions)   13   X		section 512(b)(13)? If "Yes," attach schedule (see instructions)	11	<u> </u>	X
13   X	12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges?		Į	
Website address   N/A   Telephone no. ▶ 973-376-5100				↓	X
14. The books are in care of ▶ THE FOUNDATION   Telephone no. ▶ 973-376-5100   Located at № 10.1 JFK PARKWAY, SHORT HILLS, NJ   ZIP-4 ▶ 070.78    15. Section 647(a)(1) nonezempt charibble trusts fling form 990-9F in flieu of Form 1041 - Check here and enter the amount of tax-exempt enterest received or accrued during the year   A flat yin time during clientary year 2015, did the foundation have an interest in or a signature or other authority over a bank, sectiones, or other financial account in a foreign country?  See the menticutions for exceptions and filling 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.  1a During the year did the doundation (either directly or indirectly);  13. Bogs and the sale or exchange, or teasing of property with a disqualified person?  23. Borrow money from, lend money to, or otherwise extend credit to (or accept it from)  24. Borrow money from, lend money to, or otherwise extend credit to (or accept it from)  25. Furnish goods, services, or facilities to (or accept them from) a disqualified person?  26. Furnish goods, services, or facilities to (or accept it from)  27. Furnish goods, services, or facilities to (or accept it from)  28. Furnish goods, services, or facilities to (or accept it from)  29. Furnish goods, services, or facilities to (or accept it from)  29. Furnish goods, services, or facilities to or services the expenses of, a dequalified person?  39. Furnish goods, services, or facilities for or memburs the expenses of, a dequalified person?  30. Furnish goods, services, or facilities to or services the expenses of, a dequalified person?  30. Furnish goods, services, or facilities for or services the expenses of, a dequalified person?  30. Furnish goods, services, or facilities for services and services for the form the form the form the form the form the form the	13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	<u> </u>	<u> </u>
Located al ▶ 1.01 JFK PARKWAY, SHORT HILLS, NJ  Section 4947(a)(1) nonexempt charable trusts fung form 990-PF in Neu of Form 1041-Check here and enter the amount of tax-exempt interest received or accrued during the year  16. At any time during calehold received in the received or accrued during the year  16. At any time during calehold received in the received or accrued during the year  16. At any time during calehold received in the received or accrued during the year  16. At any time during calehold received to conting?  See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign counting?  See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign counting?  See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign counting.  File Form 4720 if any Item is checked in the "Yes" column, unless an exception applies.  13. Ourning the year did the foundation (either directly or indirectly):  (1) Engage in the sale or exchange, or lessing of property with a disqualited person?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it form)  a disqualited person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualited person?  (4) Pay compensation to, or pay or remburse the expenses of, a disqualited person?  (5) Transfer any income or assets to a disqualited person of the exception of the person of					
15 Section 4947(a)(1) nonexempt charafable trusts filing form 990-PF in lieu of Form 1941 - Check here and enter the amount of tax exempt interest received or accrued during the year  16 At any time during calendar year 2015, did the foundation have an interest in or a signature or other authority over a bank, securies, or other financial account in a foreign country?  See the mistractions for exceptions and fining 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  Fite Form 4720 if any item is checked in the "Yes" column, unless an exception applies.  1a During the year did the foundation (either decely or indirectly):  (1) Engage in the sale or exchange, or lessing of property with a disqualified person?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  (3) Furnish poods, servess, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or remburse the expenses of, a disqualified person?  (5) Transfer any income or assess to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	14				
and enter the amount of that-exempt interest received or accorded during the year  6. At any time during calendar year 2015, did the foundation have an interest in or a signature or other authority over a bank, year of the 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.  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.  1a During the year did the foundation (either directly or indirectly):  (1) Engage in the sale or exchange, or leasing of property with a disqualited person?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept them)  a disqualited person?  (3) Furrish poods, services, or facilities to (or accept them from) a disqualitied person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualited person?  (5) Transier any income or assets to a disqualitied person of the exception of the temperature of the temperature of the expenses of the ex			<u>07078</u>	3	<del></del>
No securities, or other financial account in a foreign country	15		_	_ , ▶	•
See the instructions for exceptions and illing 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.  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   X   No    (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)   a disqualified person?   Yes   X   No    (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?   Yes   X   No    (4) Pay compensation to, or pay or remibuses the expenses of, a disqualified person?   Yes   X   No    (5) Transfer any income or assets to a disqualified person (or make any of either available   to the benefit or use of a disqualified person?   Yes   X   No    (6) Agree to pay money or property to a government official? (Exception Check "No"   if the loundation agreed to make a givant to or to employ the official for a period after termination of government service, if terminating within 90 days.]  b I any answer is "Yes" to 1a(1)-(5), did any of the acts fall to qualify under the exceptions described in Regulations section 34.941(d)-3 or in a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  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(a)(3) or 4942((NS)).  a At the end of ax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015?  11 "Yes," list the years beginning in 2015?  2 Taxes on failure to distribute moome (section 4942) (does not applying the provisions of section 4942(a)(2) (relating to incorrect valuation					
See the instructions for exceptions and filling 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.  1a During the year did the foundation (either directly or indirectly);  1(1) Engage in the sale or exchange, or leasing of property with a disqualified person?   Yes   No    2(2) Borrow money from, lend money to, or otherwise extend credit to (or accept in from)    a disqualified person?   Yes   No    3(3) Furnish goods, services, or facilities to (or accept ithem from) a disqualified person?   Yes   No    4(4) Pey compensation to, or pay or remitivas the expenses of, a disqualified person?   Yes   No    5(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(6) Agrice to pay money or property to a government official? (Exception Check 'No' or the foundation agreed to make a grant to or to employ the official for a period after formation of government service, if terminating within 90 days.)    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 53 494 ((6)-3 or in a current notice regarding disaster assistance (see instructions)?   Yes   No    b If any answer is "Yes" to 1a(1)-(6), did 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 2015   Yes   Xive   Yes	16			Yes	
Foreign country   Part VII-B   Statements Regarding Activities for Which Form 4720 May Be Required			16	ــــــــــــــــــــــــــــــــــــــ	X
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.  1 a 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?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  (3) Furmish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (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?  (6) Agree to pay money or property to a government official? (Exception Check No.)  (7) If the foundation agreed to make a grant to or to employ the official for a period after termination of government service, it terminating within 90 days.)  10 If any answers "S'es" to 14(1-6), did any of the acts fall to quality under the exceptions described in Regulations section 39 494 1(0)-3 or in a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Takes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(i)(3) or 49			}		1
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 lessing of property with a disqualified person?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (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)?  (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.)  b if any answer is "Yes" to 1a(1)-(6), did any of the acts fall to quality under the exceptions described in Regulations section 53 494 1(0)-3 or in a current notice regarding disaster assistance (see instructions)?  C plid 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 2015?  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(i)(3) or 4942(i)(5).  a At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015?  If "Yes," its the years is the year's undistributed income? (If applying 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.)  b If "Yes," its the years section 4942(a)(2) are being applied to any of the year's listed in 2a, list the years h	P	t VII-B   Statements Regarding Activities for Which Form 4720 May Be Required			
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?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses ol, a disqualified person?  (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?  (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.)  b) If any answer is 'Yes' to 1st (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 (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance of see the kere  c) Did the foundation engage in a prior year in any of the acts described in Ta, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2015?  If Yes, hist the year's undestributed income? (first provisions of section 4942(a)(2) or relating to incorrect valuation of assets) to the year's undistributed	۰			Vac	No
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (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)?  (6) Agree to pay money or property to a government official? (Exception Check 'No' if the foundation of povernment service, if terminating within 90 days.)  b If any answer is "Yes" to 1a(1)-(6), did any of the acts faul to qualify under the exceptions described in Regulations section 59 491 (d):3 or in a current notice regarding disaster assistance check here  c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2015?  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(i)(5)).  a At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015?  If "Yes," list the years" with the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer 'No' and attach statement - see instructions.)  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.)  b If Yes, 'did it have excess business holdings in 2015 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 50-year period (o	1:		}	163	140
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (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)?  (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 terrimation of government service, if terminating within 90 days.)  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 53 494 1(d)-3 or in a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  1b	,,			}	l
a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (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)?  (6) Agree to pay money or properly 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.)  b) If any answer is "Yes" to fa(1)-(5), did any of the acts fall to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?  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 2015?  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(i)(3) or 4942(i)(5)).  A At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015?  If "Yes," list the years is undistributed income? (If applying 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.)  b) If "Yes," did it have excess business holdings in 2015 as a result of (1) any purichase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 6-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 1-1, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess busin				1	l
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (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)?  (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.)  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 53 491 (gl-3 or in a current notice regarding disaster assistance (see instructions)?  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 2015?  T axes 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 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015?  If 'Yes,' liest the years'  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.  Are during the year?  If years is the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year should be preceded 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			.		ł
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (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 (or make any of either available for the benefit or use of a disqualified person)?  (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.)  b If any answer is 'Yes' to 1a(1)-(6), did any of the acts fall to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?  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 2015?  Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(i)(3) or 4942(i)(5).)  a At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015?  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.)  b If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.  Any 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 Schedule C, Form 4720, to determine if the foundation had excess busines					ļ
(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)?  (6) Agree to pay money or property to a government official? (Exception Check 'No' if the loundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)  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 (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  1b		· · · · · · · · · · · · · · · · · · ·		-	
(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.)  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 53 494 1(d)-3 or in a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance (see instructions)?  In 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 Paylong in 1a, other than excepted acts, that were not corrected before the first day of the tax year Paylong in 1a, other than excepted acts, that were not corrected before the first day of the tax year 42(1)(2) or years the foundation was a private operating foundation defined in 1a, other than excepted acts, that were not corrected before the first day of the tax year 2015, did the foundation of 4942(1)(5).  A the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015?  In Yes, Its the years Its and the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015?  In Yes, Its the years Its and the foundation of the foundation day (1g applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) t			1	}	}
if the loundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)  b If any answer is "Yes" to 14(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 (see instructions)?  Organizations relying on a current notice regarding disaster assistance check here  c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2015?  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(i)(3) or 4942(i)(5)).  a At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015?  If "Yes," list the years   Yes   X   No    b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)  N/A  2b  If "Yes," did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?  If yes," did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year of the sequence of the seque		for the benefit or use of a disqualified person)?	,		
termination of government service, if terminating within 90 days.)  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)?  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 2015?  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(i)(3) or 4942(i)(5)).  a At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015?  If "Yes," list the years   Yes   X No    b Are there any year's undistributed income? (If applying 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.  D  d trives," did it have excess business holdings in 2015 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 Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015)  N/A  Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  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 20		6) Agree to pay money or property to a government official? (Exception Check "No"	1		}
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  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 2015?  Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(i)(5)).  At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015?  If "Yes," list the years   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.)  If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.  If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.  If Yes," did it have excess business holdings in 2015 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 Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015)  A Did the foundation invest during the year any amount in a manner that would reopardize its charitable purposes?  A Did the foundation make any investment in a prior year (but after December 31, 1969) that could peopar			}	1	}
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  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 2015?  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(i)(3) or 4942(i)(5)).  a At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015?  If Yes, "list the years \		termination of government service, if terminating within 90 days.)	,		1
Organizations relying on a current notice regarding disaster assistance check here  C Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2015?  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(i)(3) or 4942(i)(5)).  a At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015?  If 'Yes,' list the years   Yes   X No    b Are there any years listed in 2a for which the foundation is <b>not</b> 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.)  If 'Yes,' did it have excess business holdings in 2015 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 Schedule C, Form 4720, to determine if the foundation had excess business brioldings in 2015)  A Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  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 2015?	t	f any answer is "Yes" to 1a(1)-(6), did <b>any</b> of the acts fail to qualify under the exceptions described in Regulations		1	
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 2015?  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(i)(3) or 4942(i)(5)).  a At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015?  if Yes, list the years \		section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?	1b		_X_
before the first day of the tax year beginning in 2015?  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 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015?  If "Yes," list the years \		Organizations relying on a current notice regarding disaster assistance check here	]	1	
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 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015?  If Yes," list the years \	(	·		}	
defined in section 4942(i)(3) or 4942(i)(5)).  a At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015?  If "Yes," list the years \[ \subseteq \] year S 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.)  If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.  If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.  If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.  If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.  If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.  If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.  If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.  If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.  If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.  If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.  If the provisions of section 4942(a)(2) (a) are being applied to any of the years listed in 2a, list the years listed, answer "No" and attach statements and title provisions of section 4942(a)(2) (a) (a) (a) (a) (a) (b) (a) (b) (b) (a) (b) (b) (b) (c) (c) (c) (c) (c) (c) (c) (c) (c) (c			1c	↓	X
before 2015?  If "Yes," list the years \	2				
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.)  b (If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.  c (If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.  during the year?  during the year?  during the year?  during the year of the 5-year period (or longer period approved 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 Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015)  N/A  da Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  4	ē	At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning	Ì	1	]
b Are there any years listed in 2a for which the foundation is <b>not</b> 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 <b>all</b> years listed, answer "No" and attach statement - see instructions.) <b>N/A 2b c</b> If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here. <b>a</b> Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <b>b</b> If "Yes," did it have excess business holdings in 2015 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 Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015) <b>N/A a</b> Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? <b>b</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 2015?		pefore 2015? Yes X No	,		Ì
b Are there any years listed in 2a for which the foundation is <b>not</b> 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 <b>all</b> years listed, answer "No" and attach statement - see instructions.) <b>N/A 2b c</b> If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here. <b>a</b> Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <b>b</b> If "Yes," did it have excess business holdings in 2015 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 Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015) <b>N/A a</b> Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? <b>b</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 2015?		f "Yes," list the years ▶			İ
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.	ł	Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2) (relating to incorrect			ĺ
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?  b If "Yes," did it have excess business holdings in 2015 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 Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015)  N/A  1b Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  1c 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 2015?			2b	<b>↓</b>	<u> </u>
during the year?  Description of the foundation invest during the year any amount in a manner that would jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2015?  Yes X No  Yes X No  If "Yes," did it have excess business holdings in 2015 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 Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015)  N/A  4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  4a X  Ab 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 2015?  X		•	Ì		ļ
during the year?  Description of the foundation invest during the year any amount in a manner that would jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2015?  Yes X No  Yes X No  If "Yes," did it have excess business holdings in 2015 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 Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015)  N/A  4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  4a X  Ab 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 2015?  X	_	·		İ	Ì
b If "Yes," did it have excess business holdings in 2015 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 Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015)  N/A  Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  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 2015?  X	38		}		ſ
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 Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015.)  1			'		l
of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015)  1	,				
Form 4720, to determine if the foundation had excess business holdings in 2015)  4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  4b 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 2015?  N/A  4a X  X					
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 2015?  4b X			2		
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 2015?  4b X	4.			+	v
had not been removed from jeopardy before the first day of the tax year beginning in 2015?			48	+	<del>  ^</del>
		• • • • • • • • • • • • • • • • • • • •	Ah		x
		and the second s		0-PF	

orm 990-PF (2015) INVESTORS FOUNDATION, IN			<u> 20-37438</u>	<u>57                                    </u>	Page 6
Part VII-B Statements Regarding Activities for Which I	orm 4720 May Be F	Required (contin	ued)		
5a During the year did the foundation pay or incur any amount to:					T
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	1 4945(e))?	Y6	s X No		- 1
(2) Influence the outcome of any specific public election (see section 4955); o	r to carry on, directly or indire	ectly,	1	1	ĺ
any voter registration drive?		Ye	s X No	1	
(3) Provide a grant to an individual for travel, study, or other similar purposes	7	☐ Ye	s X No	1	l
(4) Provide a grant to an organization other than a charitable, etc., organization					
4945(d)(4)(A)? (see instructions)		Ye	s X No		- }
(5) Provide for any purpose other than religious, charitable, scientific, literary,	or educational purposes, or f			1	- }
the prevention of cruelty to children or animals?	,		s X No		}
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify und	ter the exceptions described i				Ì
section 53.4945 or in a current notice regarding disaster assistance (see instru	•		N/A	5b	Ì
Organizations relying on a current notice regarding disaster assistance check h	•				
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption fi		med			ţ
expenditure responsibility for the grant?		I/A 🔲 Ye	s 🗀 No		ţ
If "Yes," attach the statement required by Regulations section 53.4945		./21	.5	Į	1
6a Did the foundation, during the year, receive any funds, directly or indirectly, to			1	1	
a personal benefit contract?	pay promitions on		s X No	1	Í
<ul><li>b Did the foundation, during the year, pay premiums, directly or indirectly, on a p</li></ul>	ersonal hanafit contract?			6b	x
If "Yes" to 6b. file Form 8870	Cradital Delicit Contract.		<u> </u>	-	<del>-   ^</del> -
7a At any time during the tax year, was the foundation a party to a prohibited tax s	haltar transaction?		es X No	ļ	ţ
b If "Yes," did the foundation receive any proceeds or have any net income attribu		16		7b	
Part VIII Information About Officers, Directors, Trusto		pagers Highly		70	
Paid Employees, and Contractors	ees, roundation wa	mayers, mgm	,		
1 List all officers, directors, trustees, foundation managers and their	compensation.		·		
	<del></del>	(c) Compensation	(d) Contributions to employee benefit plans	(e) [	Expense
(a) Name and address	(b) Title, and average hours per week devoted	(If not paid,	and deterred	accou	ınt, other
	to position	enter -0-)	compensation	allo	wances
		1		1	
SEE STATEMENT 9		87,000.	0.	1	0
JUL OTATIONIA J	<del></del>	67,000.	<u>0.</u>	<del> </del>	0.
			1		
	<u></u>		<del></del>	<del> </del>	
				<u> </u>	
		}		}	
	<del></del>	}	<del> </del>		
<del></del>		}		1	
		l		1	
2 Compensation of five highest-paid employees (other than those inc	ludad an lua 4) 16	antan IINONE II	<del></del>	L	
2 Compensation of five highest-paid employees (other than those inc		enter "NONE."	(d) Contributions to	(-)	
(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	accou	Expense unt, other
170179	devoted to position	ļ	compensation	allo	wances
NONE		1		1	
		<u> </u>	ļ	<u> </u>	
				ļ	
	·	<del> </del>	<b></b>	L	
		}		}	
	 			<u> </u>	
		}		1	
					· ———
			<u> </u>		
Total number of other employees paid over \$50,000					0
			Form	990-F	<b>PF</b> (2015)

523551 11-24-15

orm 990-PF (2015) INVESTORS FOUNDATION, INC.		743857 Page 7
Part VIII Information About Officers, Directors, Trustees, Founda Paid Employees, and Contractors (continued)	tion Managers, Highly	
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		
	_	
	_	
otal number of others receiving over \$50,000 for professional services  Part IX-A   Summary of Direct Charitable Activities		<b>&gt;</b> (
ust the foundation's four largest direct charitable activities during the tax year. Include relevant statist number of organizations and other beneficiaries served, conferences convened, research papers produced to the conference of the convened of the conference of the convened of the conference of the convened of the conference of t	tical information such as the	Expenses
	nuceu, etc.	<del></del>
N/A		
		<del></del>
Part IV-R Common of Dunman Palated In a few at	<del></del>	
Part IX-B Summary of Program-Related Investments escribe the two largest program-related investments made by the foundation during the tax year on	lines 1 and 2	Amount
N/A	illies I ditu Z.	Amount
N/A		
ll other program-related investments. See instructions.		
otal. Add lines 1 through 3	<b>&gt;</b>	0
		Form <b>990-PF</b> (2015

	m 990-PF (2015) INVESTORS FOUNDATION, INC.		J-3/43857 Page 8
<u>P</u>	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign four	ndation	ns, 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	<u>55,056,943.</u>
b	Average of monthly cash balances	1b	7,322,802.
C	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	62,379,745.
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	62,379,745.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	935,696.
5	Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4	5	61,444,049.
6	Minimum investment return Enter 5% of line 5	6	3,072,202.
P	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations ar foreign organizations check here  and do not complete this part.)	ıd certai	ın
1	Minimum investment return from Part X, line 6	1	3,072,202.
2a	Tax on investment income for 2015 from Part VI, line 5		
	Income tax for 2015. (This does not include the tax from Part VI.)	1	
	Add lines 2a and 2b	2c	20,975.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	3,051,227.
4	Recoveries of amounts treated as qualifying distributions	4	122,000.
5	Add lines 3 and 4	5	3,173,227.
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	3,173,227.
P	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	4,324,534.
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	4,324,534.
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	20,975.
6	Adjusted qualifying distributions Subtract line 5 from line 4	6	4,303,559.
	Note. The amount on line 6 will be used in Part V. column (b), in subsequent years when calculating whether the foundation of	qualifies	s for the section

Form **990-PF** (2015)

4940(e) reduction of tax in those years.

Page 9

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2014	(c) 2014	(d) 2015
1 Distributable amount for 2015 from Part XI,	30,700	1 04.0 \$1101 10 20 17		
line 7				3,173,227.
2 Undistributed income, if any, as of the end of 2015			<del></del>	3/1/3/21/1
a Enter amount for 2014 only	1		0.	
b Total for prior years:				
		0.		
3 Excess distributions carryover, if any, to 2015:				
a From 2010				
b From 2011 69,809.				
c From 2012				
d From 2013 483,319.		Ì		
e From 2014 627,341.	)			
f Total of lines 3a through e	1,180,469.			
4 Qualifying distributions for 2015 from				
Part XII, line 4. ► \$ 4,324,534.				
a Applied to 2014, but not more than line 2a			0.	
<b>b</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 2015 distributable amount				3,173,227.
e Remaining amount distributed out of corpus	1,151,307.			
5 Excess distributions carryover applied to 2015	0.			0.
(If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	2,331,776.			
b Prior years' undistributed income. Subtract				
line 4b from line 2b		0.	}	
c Enter the amount of prior years'			T	<del></del>
undistributed income for which a notice of			ŀ	
deficiency has been issued, or on which the section 4942(a) tax has been previously		Ì		
assessed		0.		
d Subtract line 6c from line 6b. Taxable				
amount - see instructions		0.		
e Undistributed income for 2014 Subtract line				
4a from line 2a. Taxable amount - see instr			0.	
f Undistributed income for 2015. Subtract	[	ĺ		
lines 4d and 5 from line 1. This amount must	İ			
be distributed in 2016				<u> </u>
7 Amounts treated as distributions out of	]	İ	)	
corpus to satisfy requirements imposed by	1	}	Í	
section 170(b)(1)(F) or 4942(g)(3) (Election	İ			
may be required - see instructions)	0.			
8 Excess distributions carryover from 2010				
not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2016.				
Subtract lines 7 and 8 from line 6a	2,331,776.			<del></del>
10 Analysis of line 9:				
a Excess from 2011 69,809.				
b Excess from 2012				
c Excess from 2013 483,319.				
d Excess from 2014 627,341.				
e Excess from 2015 1,151,307.				
				Form <b>990-PF</b> (2015)

523581 11-24-15

INVESTO1

	RS FOUNDATI			20-37	43857 Page 10
Part XIV   Private Operating F	oundations (see ins	structions and Part VI	A, question 9)	N/A	
1 a If the foundation has received a ruling o	r determination letter that	it is a private operating			
foundation, and the ruling is effective fo		_	<b>▶</b>		
<b>b</b> Check box to indicate whether the found		g foundation described		4942(j)(3) or 49	)42( <sub>1</sub> )(5)
2 a Enter the lesser of the adjusted net	Tax year		Prior 3 years		
income from Part I or the minimum	(a) 2015	<b>(b)</b> 2014	(c) 2013	(d) 2012	(e) Total
investment return from Part X for					
each year listed					
<b>b</b> 85% of line 2a			<u> </u>	<del></del>	
c Qualifying distributions from Part XII,			1		
line 4 for each year listed		<del></del>	<u> </u>		
d Amounts included in line 2c not			]		
used directly for active conduct of exempt activities			Ì		
e Qualifying distributions made directly	ı				
for active conduct of exempt activities.					
Subtract line 2d from line 2c Complete 3a, b, or c for the alternative test relied upon:  a "Assets" alternative test - enter: (1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test - enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from					
an exempt organization			<u> </u>		
(4) Gross investment income					
Part XV Supplementary Info	rmation (Comple	te this part only	if the foundation	had \$5,000 or m	ore in assets
at any time during t	he year-see instr	uctions.)			
1 Information Regarding Foundation	n Managers:				
a List any managers of the foundation wh year (but only if they have contributed in	o have contributed more		ributions received by the	e foundation before the clo	se of any tax
NONE					
b List any managers of the foundation who ther entity) of which the foundation has			(or an equally large ports	on of the ownership of a p	artnership or
NONE					
2 Information Regarding Contributi		• • • • •	-		
Check here <b>X</b> if the foundation of the foundation makes gifts, grants, etc.					
a The name, address, and telephone num	<del>`</del>	<del></del>			<u> </u>
b The form in which applications should b	e submitted and informat	ion and materials they s	hould include:		
c Any submission deadlines:		· · · · · · · · · · · · · · · · · · ·			
d Any restrictions or limitations on awards	s, such as by geographica	al areas, charitable fields	, kinds of institutions, or	other factors:	

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	or substantial contributor	Tecipient	<del></del>	
a raid during the year				
SEE ATTACHED SCHEDULE	NO INDIVIDUALS	PC	GENERAL SUPPORT	
	<del></del>			4,163,284
	ĺ			
				1
Total			<b>&gt;</b> 3a	4 163 204
Total b Approved for future payment		T		4 163 284
• Approved to rature payment				
NONE				
		<del> </del>		<del> </del>
				ļ
Total			<b>▶</b> 3b	
				Form <b>990-PF</b> (201

## Part XVI-A **Analysis of Income-Producing Activities**

Enter gross amounts unless otherwise indicated.	Unrelate	ed business income		ded by section 512, 513, or 514	(e)
1 Program service revenue.	(a) Business code	(b) Amount	Exclu- sion code	(d) Amount	Related or exempt function income
a					
b					
С					
d					
e					
1					
g Fees and contracts from government agencies				· · · · · · · · · · · · · · · · · · ·	
2 Membership dues and assessments					
3 Interest on savings and temporary cash					·
investments			14	5.614.	
4 Dividends and interest from securities			14		<del></del>
5 Net rental income or (loss) from real estate:	_	-		3311,130	
a Debt-financed property			ļ — — —		
b Not debt-financed property					
6 Net rental income or (loss) from personal					· · · · · · · · · · · · · · · · · · ·
property					
7 Other investment income					
8 Gain or (loss) from sales of assets other					
than inventory			18	1,098,650.	
9 Net income or (loss) from special events			1 - 0	1,000,000	
10 Gross profit or (loss) from sales of inventory					<del> </del>
11 Other revenue:					
a GRANTS VOIDED				122,000.	
				122,000.	<del></del>
b		-			
d	<u> </u>		<del>                                     </del>		<del></del>
——————————————————————————————————————			-		
e 12 Subtotal. Add columns (b), (d), and (e)		0.		2,221,009.	0.
13 Total Add line 12, columns (b), (d), and (e)	<u></u>	0.	L	13	
(See worksheet in line 13 instructions to verify calculations.)				13 _	2,221,007.
Part XVI-B Relationship of Activities to	the Acc	omplishment of Ex	emp	t Purposes	
Line No Explain below how each activity for which incom	ne is reported	in column (e) of Part XVI-A	contril	outed importantly to the accord	nolishment of
the foundation's exempt purposes (other than b			5511111	salaa miportamiy to ino addon	TO THE OTHER DESIGNATION OF THE OTHER DESIGNAT
		<del></del>			<del></del>
				<del></del>	
				<del></del>	
				<del></del>	
		·			
					<del></del>
		<del></del>	_		<del></del>
		****		<del></del> -	
			_		
				<del></del>	
		1.7.	_		
					<del></del>
				<u> </u>	<del></del>
	<del></del>	·			
					·
		·			
	<del></del>				<del>-</del>
1					

523621 11-24-15

Form 990-PF (2		TORS FOUN			20-374			ige <b>13</b>
Part XVII	Information Re Exempt Organ		sfers To a	and Transactions a	nd Relationships With Noncha	ritable	9	
1 Did the or	ganization directly or indi	rectly engage in any	of the followin	g with any other organization	n described in section 501(c) of	Т	Yes	No
				7, relating to political organi				
	from the reporting founda							
(1) Cash						1a(1)	}	Х
(2) Other	assets					1a(2)		Х
<b>b</b> Other tran	sactions:							
(1) Sales	of assets to a noncharita	ble exempt organizat	tion			15(1)		X
(2) Purci	hases of assets from a no	ncharitable exempt o	organization			1b(2)		Х
( <b>3</b> ) Renta	al of facilities, equipment,	or other assets				1b(3)		Х
<b>(4)</b> Reim	bursement arrangements					1b(4)		X
(5) Loan	s or loan guarantees					1b(5)		X
(6) Perfo	rmance of services or me	mbership or fundrais	sıng solicitatio	ns		1b(6)		X
_	f facilities, equipment, ma			• •		1c		X
					vays show the fair market value of the goods,		sets,	
or service	s given by the reporting for	oundation. If the four	ndation receive	ed less than fair market valui	e in any transaction or sharing arrangement,	show in		
column (c	f) the value of the goods,		<del></del>				_	
(a) Line no	(b) Amount involved	(c) Name of		exempt organization	(d) Description of transfers, transactions, and	sharing ar	rangeme	nts
			N/A					
								-
	<u> </u>							
			- <del></del>					
			<del></del>	· <del></del>				
				<u> </u>				
				<del></del>	<del> </del>			
				<del></del>	<del></del>			
	•	•	•	or more tax-exempt organiz	zations described		Г <del></del>	<b></b>
	501(c) of the Code (other		(3)) or in sect	ion 527?	L	Yes	LX	No
b If "Yes," co	omplete the following school		<del></del>	(h) Type of examples	(a) Description of relation			
	(a) Name of org	Janization		(b) Type of organization	(c) Description of relation	STIP		
	N/A		<u> </u>					
		·						
Under	negatives of periury. I declare	that I have examined the	return includin	ng accompanying schedules and	statements, and to the best of my knowledge			
	elief, it is true, correct, and cor				instance of which property has any knowledge	lay the IRS	discuss	this
Here	(8 de - 16	fla . [[		17				
7_	nature of officer or trustee	ff /		Date				
Oigi	Print/Type preparer's na	/	Preparer's s					
	I Tillo Typo preparer 3 na	anno	, reparer a a	ignaturo				
Paid	NICHOLAS J	A CANCET O	MICUOI	מד. סמ				
Preparer	Firm's name ► MCG							
Use Only	riim s name - MCG	KAIR, DOY	טה א ד	UVIV				
Joo Jiny	Firm's address ▶ 15	O DDOADUA	V _ Cm	E 121				
	NE.	W YORK, N	11 1002	0				

523622 11-24-15

FORM 990-PF INTERE	ST ON SAVII	NGS AND TEM	IPORARY	CASH ]	INVESTMENTS	STATEMENT	1
SOURCE		REVE	(A) REVENUE PER BOOKS		(B) INVESTMENT INCOME	(C) ADJUSTED NET INCOME	
INVESTORS SAVINGS B	ANK		5,614.	5,614.			
TOTAL TO PART I, LI	NE 3		5,614.		5,614.		
FORM 990-PF	DIVIDENDS	S AND INTER	EST FR	OM SECU	JRITIES	STATEMENT	2
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDEND	R	(A) EVENUE R BOOKS			
INVESTORS BANCORP	994,745	•	0.	994,745	994,74	5.	
TO PART I, LINE 4	•	0.	994,74	994,74	5.		
FORM 990-PF		OTHER I	NCOME			STATEMENT	3
DESCRIPTION			(A) REVEN PER BO		(B) NET INVEST- MENT INCOME		
GRANTS VOIDED			12	2,000.	0		
TOTAL TO FORM 990-P	F, PART I,	LINE 11	12	2,000.	0		
FORM 990-PF	ACCOUNTI	NG FEE	S		STATEMENT	4	
DESCRIPTION		(A) EXPENSES PER BOOKS	NET I	B) NVEST- INCOME	(C) ADJUSTED NET INCOM		
ACCOUNTING FEE		6,000.		1,500	•	4,5	00.
TO FORM 990-PF, PG		6,000.		1,500		1 5	00.

FORM 990-PF	OTHER PROFES	SIONAL FEES	STATEMENT 5			
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES		
CONSULTING FEE	46,010.	0.		46,010.		
TO FORM 990-PF, PG 1, LN 16C	46,010.	0.		46,010.		
FORM 990-PF	TAX	ES	S	TATEMENT 6		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES		
EXCISE TAX	25,000.	0.		0.		
TO FORM 990-PF, PG 1, LN 18	25,000.	0.		0.		
FORM 990-PF	OTHER E	XPENSES	S	TATEMENT 7		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES		
DUES & FEES GUIDESTAR COMPUTER EXPENSE OTHER EXPENSES INSURANCE	334. 750. 19,836. 1,173. 605.	0.		334. 750. 19,836. 890. 605.		
TO FORM 990-PF, PG 1, LN 23	22,698.	0.		22,415.		

FORM 990-PF	CORPORATE STOCK		STATI	EMENT 8		
DESCRIPTION		BOOK VALUE				
4327385 SHS INVESTORS BANCORP	INC	23,048,5	55. 53	53,832,669.		
TOTAL TO FORM 990-PF, PART II,	LINE 10B	E 10B 23,048,56				
	LIST OF OFFICERS, D AND FOUNDATION MANA		STAT	EMENT 9		
NAME AND ADDRESS	TITLE AND AVRG HRS/WK		EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT		
ROBERT M. CASHILL 101 JFK PARKWAY SHORT HILLS, NJ 07078	DIRECTOR/PRESI 0.50	DENT 0.	0.	0.		
KEVIN CUMMINGS 101 JFK PARKWAY SHORT HILLS, NJ 07078	DIR./VP & TREA	ASURER 0.	0.	0.		
VINCENT D. MANAHAN, III 101 JFK PARKWAY SHORT HILLS, NJ 07078	DIRECTOR 0.50	6,000.	0.	0.		
WILLIAM A TANSEY, III 101 JFK PARKWAY SHORT HILLS, NJ 07078	DIRECTOR 0.75	6,000.	. 0.	0.		
ADA MCGUINESS 101 JFK PARKWAY SHORT HILLS, NJ 07078	DIRECTOR 0.50	0.	0.	0.		
JAMES GARIBALDI 101 JFK PARKWAY SHORT HILLS, NJ 07078	DIRECTOR 0.50	0.	0.	0.		
RODGER K. HERRIGEL 101 JFK PARKWAY SHORT HILLS, NJ 07078	DIR./EX.DIR. & 15.00	SECRETARY 75,000.	0.	0.		
TOTALS INCLUDED ON 990-PF, PAGE	E 6, PART VIII	87,000.	0.	0.		

Asset No	Description	Date Acquired	Method	Life	Line No	Unadjusted Cost Or Basis	Bus % Excl	Reduction In Basis	Basis For Depreciation	Accumulated Depreciation	Current Sec 179	Current Year Deduction
							!	-				
						1	;					
									:			
	1											
									,			
					į							