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Form 990-PF

Department of the Treasury

Internal Revenue Service

As Filed Data -

DLN: 93491319049848

2017

2017

OMB No 1545-0052

Return of Private Foundation

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

▶ Do not enter social security numbers on this form as it may be made public.
 ▶ Information about Form 990-PF and its instructions is at www.irs.gov/form990pf.

Open to Public Inspection

For	caler	ndar year 2017, or tax year beginning 01-01-2	.017 , aı	nd en	ding 12-31-	2017	
		Indation FAMILY FOUNDATION				entification numbe	r
					36-4154510		
		d street (or P O box number if mail is not delivered to street addres ELD DRIVE SUITE 360	s) Room/suite		B Telephone nu	mber (see instructior	ns)
					(224) 880-1220	ı	
		n, state or province, country, and ZIP or foreign postal code ST, IL 60045			C If exemption	application is pending	g, check here
G Cl	neck al	ll that apply 🔲 Initial return 🔲 Initial return of	a former public charity		D 1. Foreign or	ganızatıons, check he	re
		☐ Final return ☐ Amended return	n			ganizations meeting	
		Address change Name change			·	k here and attach cor	· -
H C	neck ty	$ \sqrt{p} $ e of organization $ \sqrt{S} $ Section 501(c)(3) exempt private	e foundation			ındatıon status was t n 507(b)(1)(A), chec	
<u></u> :	Section	n 4947(a)(1) nonexempt charitable trust					
of	year <i>(f</i>	ket value of all assets at end from Part II, col (c), \$ 139,363,903 Accounting method Other (specify) (Part I, column (d) must	Cash L Accru	ıal		ition is in a 60-month n 507(b)(1)(B), checl	
Pa	rt I	Analysis of Revenue and Expenses (The total	(a) Revenue and				(d) Disbursements
		of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))	(a) Revenue and expenses per books	(b) 1	Net investment income	(c) Adjusted net income	for charitable purposes (cash basis only)
	1	Contributions, gifts, grants, etc , received (attach schedule)	13,859,174	1			
	2	Check ▶ ☐ If the foundation is not required to attach					
		Sch B					
	3	Interest on savings and temporary cash investments	5	5	5	5	
	4	Dividends and interest from securities	17,182	2	17,182	17,182	
	5a	Gross rents					
<i>a</i> .	b 6а	Net rental income or (loss) Net gain or (loss) from sale of assets not on line 10	14,234,892	2			
Ĕ	b		14,234,032	-			
Revenue	"	Gross sales price for all assets on line 6a17,377,90	4				
ă	7	Capital gain net income (from Part IV, line 2)			14,234,892		
	8	Net short-term capital gain				14,234,892	
	9	Income modifications					
	10a b	Gross sales less returns and allowances Less Cost of goods sold	<u> </u>				
	c	Gross profit or (loss) (attach schedule)					
	11	Other income (attach schedule)					
	12	Total. Add lines 1 through 11	28,111,253	3	14,252,079	14,252,079	
	13	Compensation of officers, directors, trustees, etc	169,463		0	0	169,463
	14	Other employee salaries and wages	3,257,007	-	0	0	3,257,007
Ş	15	Pension plans, employee benefits	890,952	2	0	0	890,952
nse	16a	Legal fees (attach schedule)	2,457	7	0	0	2,457
<u>\$</u>	ь	Accounting fees (attach schedule)	17,048	3	0	0	17,048
and Administrative Expenses	c	Other professional fees (attach schedule)	282,608	3	0	0	282,608
Ĭ	17	Interest	682,474	1	0	0	682,474
stra	18	Taxes (attach schedule) (see instructions)					
≣	19	Depreciation (attach schedule) and depletion	100,644	1	0	0	
Ę.	20	Occupancy	158,688	3	0	0	158,688
₽ PI	21	Travel, conferences, and meetings	89,415	_	0	0	89,415
	22	Printing and publications	407		0	0	407
ğu	23	Other expenses (attach schedule)	3,098,691	1	3	0	3,098,688
Operating	24	Total operating and administrative expenses.	0 740 054	,	3	_	9 640 207
ď	25	Add lines 13 through 23	8,749,854 326,997	-	3	0	8,649,207 326,997
	26	Total expenses and disbursements. Add lines 24 and	320,337				320,337
		25	9,076,851	1	3	0	8,976,204
	27	Subtract line 26 from line 12	10.034.403				
	a	Excess of revenue over expenses and disbursements	19,034,402				
	ь	Net investment income (If negative, enter -0-)			14,252,076		
<u>-</u> -	С	Adjusted net income(if negative, enter -0-)	1			14,252,079	l
гor	raper	work Reduction Act Notice, see instructions.		С	at No 11289	K For	m 990-PF (2017)

		Less allowance for doubtful accounts ▶			
	4	Pledges receivable ▶			
		Less allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other			
		disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶			
		Less allowance for doubtful accounts ▶			
y.	8	Inventories for sale or use			
Assets	9	Prepaid expenses and deferred charges			
As	10a	Investments—U S and state government obligations (attach schedule)			
	ь	Investments—corporate stock (attach schedule)	136,478,739	161,180,764	136,332,47
	c	Investments—corporate bonds (attach schedule)			

2,437,585

164,212,196

43,500,232

43,590,573

120,621,623

120,621,623

164,212,196

2

3

4

5

109,445,272

19,034,402

128,479,674

120,621,623 Form **990-PF** (2017)

7,858,051

90,341

36,019,694

36.030.942

109,445,272

109,445,272

145,476,214

11,248

(چ

593,847

2,437,585

139,363,903

593,847

Investments—land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) Investments—mortgage loans Investments—other (attach schedule) Land, buildings, and equipment basis 2,538,229 Less accumulated depreciation (attach schedule) ▶ 663,940 (چ 0 Other assets (describe > _ Total assets (to be completed by all filers—see the instructions Also, see page 1, item I) 145,476,214 Accounts payable and accrued expenses

Foundations that follow SFAS 117, check here ▶

and complete lines 24 through 26 and lines 30 and 31.

Foundations that do not follow SFAS 117, check here ▶

Paid-in or capital surplus, or land, bldg, and equipment fund

Capital stock, trust principal, or current funds

Retained earnings, accumulated income, endowment, or other funds

Total net assets or fund balances (see instructions)

Total liabilities and net assets/fund balances (see instructions) .

Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-

Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30

Analysis of Changes in Net Assets or Fund Balances

Loans from officers, directors, trustees, and other disqualified persons Mortgages and other notes payable (attach schedule).

Total liabilities(add lines 17 through 22)

Other liabilities (describe -

Unrestricted

Temporarily restricted

Permanently restricted . .

and complete lines 27 through 31.

of-year figure reported on prior year's return)

Add lines 1, 2, and 3

Decreases not included in line 2 (itemize) ▶

Other increases not included in line 2 (itemize)

Enter amount from Part I, line 27a

11

12

13

14

15

16

17

18

19

20

21

22

23

24 25

26

28

29

31 Part III

Liabilities

Fund Balances

ŏ

Assets 27

Net 30

2

3

5

Page **3**

	(a) the kınd(s) of property sold (e g , re ehouse, or common stock, 200 shs	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)	
1 a PUBLICLY TRADED SECU	RITIES				
b					
С					
d					
e					
(-)	(f)		(g)	(1	h)
(e) Gross sales price	Depreciation allowed		other basis		r (loss)
<u> </u>	(or allowable)	plus expe	ense of sale	(e) plus (f) minus (g)
	7,904		3,143,012		14,234,892
b					
<u>c</u>					
d					
e					
Complete only for assets	s showing gain in column (h) and ow				l)
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	Excess	(k) of col(ı) (₁), ıf any	col (k), but not	h) gain minus less than -0-) or om col (h))
	as 01 12/31/09	Over cor	(j), ii aliy	203303 (11	14,234,892
a b					17,257,072
С					
d					
e					
2 Capital gain net income	or (net capital loss)	If gain, also enter in P If (loss), enter -0- in F		2	14,234,892
If gain, also enter in Pa in Part I, line 8	gain or (loss) as defined in sections art I, line 8, column (c) (see instructi	ons) If (loss), enter -0	}	3	14,234,892
	Jnder Section 4940(e) for Re				
For optional use by domestic p	rivate foundations subject to the sec	ction 4940(a) tax on ne	t investment incom	e)	
f section 4940(d)(2) applies, le	eave this part blank				
Vas the foundation liable for th	e section 4942 tax on the distributa		in the base period?	, Y	es 🔽 No
	ot qualify under section 4940(e) Do nount in each column for each year,		making any entries		
(a)	,		making any cheric.	(d)	
Base period years Calendar	(b) Adjusted qualifying distributions	(c) Net value of noncharitab	le-use assets	Distribution rati	-
year (or tax year beginning in) 2016	7,300,542		83,241,662	(col (b) divided by c	0 087703
2015	7,300,342		120,101,416		0 060364
2013	6,450,481		151,045,880		0 042705
2013	4,906,253		135,339,506		0 036251
2012	4,146,489		66,990,515		0 061897
2 Total of line 1, column (, ,		2		0 288920
•	o for the 5-year base period—divide	the total on line 2 by 5			<u> </u>
	ndation has been in existence if less		3		0 057784
	ncharitable-use assets for 2017 fron		4		85,546,170
5 Multiply line 4 by line 3			5		4,943,200
6 Enter 1% of net investme	ent income (1% of Part I, line 27b)		6		142,521
7 Add lines 5 and 6			7		5,085,721
8 Enter qualifying distribut	ons from Part XII, line 4 ,		8		8,976,204
	eater than line 7, check the box in Pa			g a 1% tax rate Se	e the Part VI

If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?.

7b

3 **
Total. Add lines 1 through 3

•	,
	Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees,
	and Contractors

1 List all officers, directors, trustee	s, foundation managers ar	nd their compensation	· · · · · · · · · · · · · · · · · · ·	1
(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
ee Additional Data Table			,	
2 Compensation of five highest-pair	d employees (other than tl	 hose included on line :	 1—see instructions). If no	 ne, enter "NONE."
(a)	Title, and average		Contributions to	
Name and address of each employee pa more than \$50,000		(c) Compensation	employee benefit plans and deferred (d) compensation	Expense account, (e) other allowances
SUSAN TOBACK	DIRECTOR OF FINANCE	69,39	2,943	61
LOO N FIELD DRIVE SUTE 360 LAKE FOREST, IL 60045	10 00			
IOANNE BERTSCH	REGIONAL DIRECTOR	68,49	2,075	67!
100 N FIELD DRIVE SUTE 360 LAKE FOREST, IL 60045	40 00			
IULI ALANNA SCALF	CO-DIRECTOR OF COLLE	67,20	05 447	61!
100 N FIELD DRIVE SUTE 360	40 00			
LAKE FOREST, IL 60045 RYAN EVERTT	CO-DIRECTOR OF COLLE	62,44	45 2,558	615
100 N FIELD DRIVE SUTE 360	40 00	02,4-	2,330	013
AKE FOREST, IL 60045	COLLOGUE DEPERTOR	-7.6	2 561	
STEPHANIE OETTINGER 100 N FIELD DRIVE SUTE 360	SCHOOL DIRECTOR 40 00	57,66	58 2,561	660
LAKE FOREST, IL 60045				
Total number of other employees paid ove				(
 Five highest-paid independent co (a) Name and address of each person 	·	· · · · · · · · · · · · · · · · · · ·	ons). It none, enter "NON be of service	(c) Compensation
CIRCA30 TECHNOLOGYBILD GROUP LLC	. ,	TECHNOLOGY SERVICE		162,32
207 E OHIO STRET STE 248 CHICAGO,IL 60611				
OHR INTERNATIONAL		CONSULTING SERVICE	S	72,834
121 N JEFFERSON		1		
CHICAGO, IL 60661 ACORN ADVISORS		CONSULTING SERVICE	S	50,314
L347 N STATE PKWY				30,32
CHICAGO, IL 60610				
		1		
			_	
Total number of others receiving over \$50 Part IX-A Summary of Direct C	'			
ist the foundation's four largest direct charitable	activities during the tax year Incli	ude relevant statistical inforr	nation such as the number of	Expenses
organizations and other beneficiaries served, conf 1 COLLEGE SCHOLARSHIPS FOR STUDEN CRISTO REY ST MARTIN, ZION-BENTO	NTS AT HIGHLAND PARK, MAI	NE EAST, ROUND LAKE,		Expenses
WESTINGHOUSE, MUNDELEIN AND RT	C MEDICAL PREPARATORY HI	GH SCHOOLS		326,997
2 SUMMER COLLEGE PROGRAM FOR STU WAUKEGAN, CRISTO REY ST MARTIN, GEORGE WESTINGHOUSE, MUNDELEIN	ZION-BENTON, NORTH CHIC	AGO, LINDBLOM MATH		494,558
COLLEGE VISITS AND COUNSELING FOR WAUKEGAN, CRISTO REY ST MARTIN, GEORGE WESTINGHOUSE, MUNDELEIN	ZION-BENTON, NORTH CHIC	AGO, LINDBLOM MATH		616,022
4 LEADERSHIP CAMP FOR STUDENTS AT REY ST MARTIN, ZION-BENTON, NOR WESTINGHOUSE, MUNDELEIN AND RT	HIGHLAND PARK, MAINE EAS TH CHICAGO, LINDBLOM MAT	ST, ROUND LAKE, WARR		240,855
	1-Related Investments			2 10,033
Describe the two largest program-related inve		-	and 2	Amount
1 THE SCHULER FOUNDATION DOES NO	T HAVE ANY PROGRAM RELAT	EDINVESTMENTS		
2				
All other program-related investments	See instructions			

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Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for

2

3a 3h

4

5

8.976.204

142.521

8.833.683

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Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc.,

Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment

Adjusted qualifying distributions. Subtract line 5 from line 4.

Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4

Amounts set aside for specific charitable projects that satisfy the

the section 4940(e) reduction of tax in those years

2

3

4

5

a From 2012. **b** From 2013. c From 2014. . . . d From 2015. e From 2016.

XII, line 4 ▶ \$

indicated below:

3 Excess distributions carryover, if any, to 2017

f Total of lines 3a through e. 4 Qualifying distributions for 2017 from Part

same amount must be shown in column (a))

a Applied to 2016, but not more than line 2a **b** Applied to undistributed income of prior years (Election required—see instructions). c Treated as distributions out of corpus (Election required—see instructions). **d** Applied to 2017 distributable amount. . . . e Remaining amount distributed out of corpus **5** Excess distributions carryover applied to 2017 (If an amount appears in column (d), the

6 Enter the net total of each column as

9 Excess distributions carryover to 2018.

10 Analysis of line 9

a Excess from 2013. . . **b** Excess from 2014. . c Excess from 2015. . . . d Excess from 2016. . . e Excess from 2017. . .

Subtract lines 7 and 8 from line 6a

a Corpus Add lines 3f, 4c, and 4e Subtract line 5 b Prior years' undistributed income Subtract line 4b from line 2b c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed. d Subtract line 6c from line 6b Taxable amount e Undistributed income for 2016 Subtract line 4a from line 2a Taxable amount—see instructions f Undistributed income for 2017 Subtract lines 4d and 5 from line 1. This amount must be distributed in 2018 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions) 8 Excess distributions carryover from 2012 not applied on line 5 or line 7 (see instructions) . . . (d)

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Page 9

OIII	1 330-F1 (2017)	,					
R	art XIII U	ndistrib	uted Ir	come	see inst	ructions)
							(a) Corpus
1	Distributable a	mount for	2017 fro	m Part	XI, line 7		
2	Undistributed i	ncome, if a	ny, as o	f the e	nd of 2017		
а	Enter amount	for 2016 o	nly				
b	Total for prior	years 2	.0,	20	_ , 20		

(b)

Years prior to 2016

(c)

2016

nter gross	amounts unless otherwise indicated	Unrelated bu	siness income	Excluded by section	512, 513, or 514	(e) Related or exemp
L Program	service revenue	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	function income (See instructions
		+		-		
	and contracts from government agencies					
	ship dues and assessments					
	st on savings and temporary cash ments			14	5	
	ds and interest from securities			14	17,182	
	tal income or (loss) from real estate					
a Debt-	inanced property					
	ebt-financed property					
	ntal income or (loss) from personal property					
	nvestment income					
	r (loss) from sales of assets other than ory			18	14,234,892	
	ome or (loss) from special events					
	rofit or (loss) from sales of inventory					
	evenue a					
		+		-		
4						
e	Add columns (b), (d), and (e).		0		14,252,079	
e Subtota Total. /	al Add columns (b), (d), and (e) Add line 12, columns (b), (d), and (e)		0	13	14,252,079 3	
e Subtota Total. / (See wo	Add columns (b), (d), and (e) Add line 12, columns (b), (d), and (e) Add line 12 instructions to verify calcuers Brelationship of Activities to the Explain below how each activity for which	lations) e Accomplish income is reporte	ment of Exem	pt Purposes f Part XVI-A contribut	Bted importantly to	14,252,079
e Subtota Total. / (See wo art XVI	al Add columns (b), (d), and (e) Add line 12, columns (b), (d), and (e) rksheet in line 13 instructions to verify calcu B Relationship of Activities to th	lations) e Accomplish income is reporte	ment of Exem	pt Purposes f Part XVI-A contribut	Bted importantly to	14,252,079
e Subtota Total. / (See wo art XVI	al Add columns (b), (d), and (e) Add line 12, columns (b), (d), and (e) Add line 12 instructions to verify calcular colors. Belationship of Activities to the Explain below how each activity for which the accomplishment of the foundation's explain below the second colors.	lations) e Accomplish income is reporte	ment of Exem	pt Purposes f Part XVI-A contribut	Bted importantly to	14,252,07
e Subtota Total. / (See wo art XVI	al Add columns (b), (d), and (e) Add line 12, columns (b), (d), and (e) Add line 12 instructions to verify calcular colors. Belationship of Activities to the Explain below how each activity for which the accomplishment of the foundation's explain below the second colors.	lations) e Accomplish income is reporte	ment of Exem	pt Purposes f Part XVI-A contribut	Bted importantly to	14,252,079
e Subtota Total. / (See wo art XVI	al Add columns (b), (d), and (e) Add line 12, columns (b), (d), and (e) Add line 12 instructions to verify calcular colors. Belationship of Activities to the Explain below how each activity for which the accomplishment of the foundation's explain below the second colors.	lations) e Accomplish income is reporte	ment of Exem	pt Purposes f Part XVI-A contribut	Bted importantly to	14,252,079
e Subtota Total. / (See wo art XVI	al Add columns (b), (d), and (e) Add line 12, columns (b), (d), and (e) Add line 12 instructions to verify calcular colors. Belationship of Activities to the Explain below how each activity for which the accomplishment of the foundation's explain below the second colors.	lations) e Accomplish income is reporte	ment of Exem	pt Purposes f Part XVI-A contribut	Bted importantly to	14,252,07
eSubtota Total. / (See wo	al Add columns (b), (d), and (e) Add line 12, columns (b), (d), and (e) Add line 12 instructions to verify calcular colors. Belationship of Activities to the Explain below how each activity for which the accomplishment of the foundation's explain below the second colors.	lations) e Accomplish income is reporte	ment of Exem	pt Purposes f Part XVI-A contribut	Bted importantly to	14,252,07
eSubtota Total. / (See wo	al Add columns (b), (d), and (e) Add line 12, columns (b), (d), and (e) Add line 12 instructions to verify calcular colors. Belationship of Activities to the Explain below how each activity for which the accomplishment of the foundation's explain below the second colors.	lations) e Accomplish income is reporte	ment of Exem	pt Purposes f Part XVI-A contribut	Bted importantly to	14,252,07
eSubtota Total. / (See wo	al Add columns (b), (d), and (e) Add line 12, columns (b), (d), and (e) Add line 12 instructions to verify calcular colors. Belationship of Activities to the Explain below how each activity for which the accomplishment of the foundation's explain below the second colors.	lations) e Accomplish income is reporte	ment of Exem	pt Purposes f Part XVI-A contribut	Bted importantly to	14,252,07
eSubtota Total. / (See wo	al Add columns (b), (d), and (e) Add line 12, columns (b), (d), and (e) Add line 12 instructions to verify calcular colors. Belationship of Activities to the Explain below how each activity for which the accomplishment of the foundation's explain below the second colors.	lations) e Accomplish income is reporte	ment of Exem	pt Purposes f Part XVI-A contribut	Bted importantly to	14,252,07
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eSubtota Total. / (See wo	al Add columns (b), (d), and (e) Add line 12, columns (b), (d), and (e) Add line 12 instructions to verify calcular colors. Belationship of Activities to the Explain below how each activity for which the accomplishment of the foundation's explain below the second colors.	lations) e Accomplish income is reporte	ment of Exem	pt Purposes f Part XVI-A contribut	Bted importantly to	14,252,079
eSubtota Total. / (See wo	al Add columns (b), (d), and (e) Add line 12, columns (b), (d), and (e) Add line 12 instructions to verify calcular colors. Belationship of Activities to the Explain below how each activity for which the accomplishment of the foundation's explain below the second colors.	lations) e Accomplish income is reporte	ment of Exem	pt Purposes f Part XVI-A contribut	Bted importantly to	14,252,079
e Subtotal. / (See wo art XVI ine No.	al Add columns (b), (d), and (e) Add line 12, columns (b), (d), and (e) Add line 12 instructions to verify calcular colors. Belationship of Activities to the Explain below how each activity for which the accomplishment of the foundation's explain below the second colors.	lations) e Accomplish income is reporte	ment of Exem	pt Purposes f Part XVI-A contribut	Bted importantly to	14,252,079

orm 99	0-PF (2	<u> </u>							Pa	ge 13
Part	XVII	Information Re Exempt Organi		ansfers To a	and Transact	ions and Rela	tionships With No	ncharitable		
		anization directly or in Code (other than sectio					ation described in secti cal organizations?	ion 501	Yes	No
		rom the reporting foun								
(1)	Cash.							. 1a(1)		No
` '		assets						. 1a(2))	No
		sactions								
` '		of assets to a nonchar	•	-				1b(1)	+	No
		ases of assets from a r l of facilities, equipmer						1b(2)	_	No No
		oursement arrangemen	•					. 1b(3)	+	No
		or loan guarantees.						. 1b(5)	+	No
٠.		mance of services or m						. 1b(6	+	No
c Shar	ring of	facılıtıes, equipment, n	nailing lists, ot	her assets, or	paid employees			. 1c		No
of th	ne good ny trans	ls, other assets, or ser	vices given by ngement, shov	the reporting v in column (c	foundation If the	ne foundation rece he goods, other a	l always show the fair in elived less than fair man essets, or services recein n of transfers, transactions	rket value Ived	angemer	nts
(2) 2		(D) / modific mivelines	(c) Hame of the		pr organization	(2) Bessinpaior	To cranology transactions	, and onamig and		
	_									
	_									
	_									
	_									
2a Ic th	ae foun	dation directly or indire	ctly affiliated	with or relate	d to one or mo	re tav-evemnt ord	anizations			
		n section 501(c) of the	•					🗆 Yes	✓	No
		mplete the following se	•	ilan seedish se	22(0)(0)) 0: 0					
		(a) Name of organization		(1	b) Type of organiz	ation	(c) Description	n of relationship		
	of my		, it is true, cor		•		nying schedules and si ner than taxpayer) is b	•		
Sign Here	*	****			2018-11-15	****	*	May the IRS of return with the prep		
	s	ignature of officer or t	rustee		Date	Title		below (see instr)?	✓ Yes	□ _{No}
		Print/Type preparer's	name F	Preparer's Sigi	nature	Date	Check If self-	PTIN P0064	1738	
Paid		JAMES G QUAID				2018-11-15	employed ▶ ☐			
Prepa Use (Firm's name ▶ OSTI	ROW REISIN B	ERK & ABRAM	IS LTD	<u>'</u>	,	Fırm's EIN ►36	5-29388	374
	-	Firm's address ▶ 45	5 N CITYFRON	T PLAZA DR S	SUITE 1500					

CHICAGO, IL 60611

Phone no (312) 670-7444

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation (a) Name and address Title, and average (c) Compensation (If (d) Expense account, hours per week not paid, enter Contributions to (e) other allowances (b) devoted to position -0-) employee benefit plans and deferred compensation

	PRESIDENT &	0	0	(
100 N FIELD DRIVE SUTE 360 LAKE FOREST, IL 60045	SECRETARY 1 00			
DENATE D SCHILLED	TREACHRER			

100 N FIELD DRIVE SUTE 360 LAKE FOREST, IL 60045	1 00			
RENATE R SCHULER	TREASURER	0	0	0
100 N FIELD DRIVE SUTE 360 LAKE FOREST, IL 60045	1 1 00			

RENATE R SCHULER	TREASURER	0	0	0
100 N FIELD DRIVE SUTE 360 LAKE FOREST, IL 60045	1 00			
TANYA E SHARMAN	VICE PRESIDENT	23,250	0	0
100 N FIELD DRIVE SUTE 360	1 00			

LAKE FOREST, IL 60045				
TANYA E SHARMAN	VICE PRESIDENT	23,250	0	0
100 N FIELD DRIVE SUTE 360 LAKE FOREST, IL 60045	1 00			
TINO H SCHULER	VICE PRESIDENT	0	0	0
	1 1 00			

	VICETRESIDENT	23,230	_	
100 N FIELD DRIVE SUTE 360 LAKE FOREST, IL 60045	1 00			
TINO H SCHULER	VICE PRESIDENT	0	0	0
100 N FIELD DRIVE SUTE 360 LAKE FOREST, IL 60045	1 00			

LAKE FOREST, IL 60045				
TINO H SCHULER	VICE PRESIDENT	0	0	0
100 N FIELD DRIVE SUTE 360 LAKE FOREST, IL 60045	1 00			
THERESE H HOFFMAN	VICE PRESIDENT	0	0	0

100 N FIELD DRIVE SUTE 360 LAKE FOREST, IL 60045	1 00			
CANDACE BROWDY	FORMER EXECUTIVE	98.378	4.107	255

CANDACE BROWDY	FORMER EXECUTIVE	98,378	4,107	255	
100 N FIELD DRIVE SUTE 360	DIRECTOR 30 00				

CANDACE BROWN	PURITER EXECUTIVE	30,376	4,107	_
100 N FIELD DRIVE SUTE 360 LAKE FOREST, IL 60045	DIRECTOR 30 00			

JASON PATENAUDE	EXECUTIVE DIRECTOR	47,835	2,400	,
100 N FIELD DRIVE SUTE 360	40 00			

LAKE FOREST, IL 60045

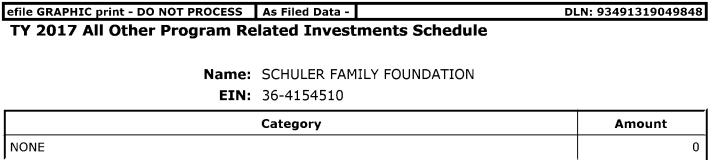
220

efile GRAPHIC print - DO NOT PROCESS As Filed Data - DLN: 93491319049848 TY 2017 Accounting Fees Schedule							
_	Name:	SCHULER FAM	III Y FOUNDAT	TON			
		36-4154510	IIEI I OONDAI	1011			
Accounting Fees Schedule							
Category	Amo	ount Net	Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes		

17,048

17,048

ACCOUNTING FEES



Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2017 Depreciation Schedule

Name: SCHULER FAMILY FOUNDATION

EIN: 36-4154510

Description of Property	Date Acquired	Cost or Other Basıs	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
COMPUTERS	2006-07-01	5,459	5,459	200DB	5 000000000000	0	0	0	
USED FURNITURE	2007-03-31	753	753	SL	7 000000000000	0	0	0	
VANS (2)	2008-06-17	48,604	21,260	200DB	5 000000000000	1,775	0	1,775	
COMPUTERS (5)	2008-07-07	6,360	6,360	SL	5 000000000000	0	0	0	
OFFICE FURNITURE	2008-10-07	1,000	1,000	SL	7 000000000000	0	0	0	
OFFICE FURNITURE	2008-08-29	1,500	1,500	SL	7 000000000000	0	0	0	
122 PRAIRIE AVE	2009-09-21	430,000	80,396	SL	39 000000000000	11,025	0	11,025	
2009 HONDA ODYSSEY	2009-05-14	26,400	19,485	200DB	5 000000000000	1,775	0	1,775	
2009 HONDA ODYSSEY	2009-05-14	26,400	19,485	200DB	5 00000000000	1,775	0	1,775	
HOUSE	2011-07-20	423,500	59,280	SL	39 000000000000	10,859	0	10,859	
HOUSE - EUCLID	2012-05-31	411,000	48,749	SL	39 000000000000	10,538	0	10,538	
739 S FOURTH	2014-04-17	320,000	22,231	SL	39 000000000000	8,205	0	8,205	
416 W GOLF ROAD	2014-04-29	376,000	26,121	SL	39 000000000000	9,641	0	9,641	
2014 HONDA ODYSSEY	2014-06-26	26,509	7,859	200DB	5 000000000000	1,768	0	1,875	
2014 HONDA ODYSSEY	2014-06-26	26,509	7,859	200DB	5 000000000000	1,768	0	1,875	
2014 HONDA ODYSSEY	2014-06-26	26,509	7,859	200DB	5 000000000000	1,768	0	1,875	
2014 HONDA ODYSSEY	2014-06-26	26,509	7,859	200DB	5 000000000000	1,768	0	1,875	
2015 HONDA ODYSSEY	2015-02-10	28,889	9,219	200DB	5 000000000000	3,404	0	5,778	
2015 HONDA ODYSSEY	2015-06-30	28,920	9,235	200DB	5 00000000000	3,410	0	5,784	
1136 DAWES AVE	2015-03-10	340,000	15,630	SL	39 000000000000	8,718	0	8,718	

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
521 HEMLOCK AVE	2015-03-30	310,000	14,250	SL	39 000000000000	7,948	0	7,948	
OFFICE FURNITURE	2015-06-25	4,900	950	200DB	7 000000000000	429	0	700	
OFFICE FURNITURE	2015-12-27	2,925	567	200DB	7 000000000000	256	0	418	
OFFICE FURNITURE	2015-08-03	3,672	712	200DB	7 000000000000	321	0	525	
OFFICE FURNITURE	2015-07-20	4,091	793	200DB	7 000000000000	358	0	584	
OFFICE FURNITURE	2015-05-14	27,127	5,260	200DB	7 000000000000	2,372	0	3,875	
OFFICE FURNITURE	2015-06-04	101,856	19,750	200DB	7 000000000000	8,907	0	14,551	
OFFICE SIGN	2015-05-27	2,580	500	200DB	7 000000000000	226	0	369	
OFFICE BUILDOUT 100 N FIELD DRIVE	2015-07-01	63,553	2,378	SL	39 000000000000	1,630	0	1,630	

	efile GRAPHIC print - DO NOT PROCESS	As Filed Data -
TV 2017 Investments Corporate Stock Schodule		

TY 2017 Investments Corporate Stock Schedule

Name: SCHULER FAMILY FOUNDATION

DLN: 93491319049848

EIN: 36-4154510					
Name of Stock	End of Year Book Value	End of Year Fair Market Value			
ABBOTT LABORATORIES	419	3,424			
ABBVIE INC	455	5,803			
ACCELERATE DIAGNOSTIS	26,177,252	39,308,463			
GTX	25,738,068	7,965,293			
BIOLASE INC. RESTRICTED	24,125,777	8,761,231			
YIELD10 BIOSCIENCE	22,930,683	3,795,128			
QUIDEL	15,114,963	45,674,774			
OPKO HEALTH INC	24,072,683	3,237,396			
AURIS SURGICAL ROBOTICS, INC.	17,733,628	17,733,628			
MAZOR ROBOTICS LTD	130,003	3,154,411			
NEOS THERAPEUTICS INC.	3,341,250	5,049,000			
BIOLASE INC WARRANTS	225,067	225,067			
BIOLASE INC.	631,352	643,263			
PACIFIC BIOSCIENCES CALIFORNIA	959,164	775,590			

TY 2017 Land, Etc. Schedule

Name: SCHULER FAMILY FOUNDATION

EIN: 36-4154510

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
COMPUTERS	5,459	5,459	0	
USED FURNITURE	753	753	0	
VANS (2)	48,604	23,035	25,569	
COMPUTERS (5)	6,360	6,360	0	
OFFICE FURNITURE	1,000	1,000	0	
OFFICE FURNITURE	1,500	1,500	0	
122 PRAIRIE AVE	430,000	91,421	338,579	
2009 HONDA ODYSSEY	26,400	21,260	5,140	
2009 HONDA ODYSSEY	26,400	21,260	5,140	
HOUSE	423,500	70,139	353,361	
HOUSE - EUCLID	411,000	59,287	351,713	
739 S. FOURTH	320,000	30,436	289,564	
416 W GOLF ROAD	376,000	35,762	340,238	
2014 HONDA ODYSSEY	26,509	20,787	5,722	
2014 HONDA ODYSSEY	26,509	20,787	5,722	
2014 HONDA ODYSSEY	26,509	20,787	5,722	
2014 HONDA ODYSSEY	26,509	20,787	5,722	
2015 HONDA ODYSSEY	28,889	23,783	5,106	
2015 HONDA ODYSSEY	28,920	23,805	5,115	
1136 DAWES AVE	340,000	24,348	315,652	
521 HEMLOCK AVE	310,000	22,198	287,802	
OFFICE FURNITURE	4,900	3,829	1,071	
OFFICE FURNITURE	2,925	2,286	639	
OFFICE FURNITURE	3,672	2,869	803	
OFFICE FURNITURE	4,091	3,197	894	
OFFICE FURNITURE	27,127	21,196	5,931	
OFFICE FURNITURE	101,856	79,585	22,271	
OFFICE SIGN	2,580	2,016	564	
OFFICE BUILDOUT 100 N. FIELD DRIVE	63,553	4,008	59,545	

efile GRAPHIC print - DO NOT PROCE	SS As Filed Data	-	DLN	l: 93491319049848
TY 2017 Legal Fees Schedu	ıle			
Nar	ne: SCHULER FA	MILY FOUNDATIO	N	
E	IN: 36-4154510			
Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	2,457	0	0	2,457

Description

efile GRAPHIC print - DO NOT PROCESS

Name: SCHULER FAMILY FOUNDATION

EIN: 36-4154510

As Filed Data -

Other Assets Schedule

DUE FROM BROKER

Beginning of Year -

Book Value

DLN: 93491319049848

End of Year - Fair Market Value

593,847

End of Year - Book Value

593,847

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -		DLN: 93491319049848			
TY 2017 Other Decreases Schedule						
Name:	SCHULER FAM	ILY FOUNDATION				
EIN:	36-4154510					
De	escription		Amount			

ADJUST DONATED STOCK TO DONOR BASIS 7,858,051

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -		DLN:	93491319049848		
TY 2017 Other Expenses Schedule						
Name:	SCHULER FAMIL	Y FOUNDATION				
EIN:	EIN: 36-4154510					
Other Expenses Schedule						
Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes		
COLLEGE VISITS	269,737	0	0	269,737		

37,383

34,209

18,531

240,855

17,466

244,291

11,134

162,350

25

0

0

0

0

0

0

0

0

0

37,383

34,209

18,531

240,855

17,466

244,291

11,134

162,350

25

0

0

0

0

0

0

0

INSURANCE

SCHOLAR INCENTIVE AWARDS

SUMMER INTERNATIONAL

LEADERSHIP CAMP

SCHOLAR EXPOSURES

PAYROLL PROCESSING

STAFF RETREAT

FILING FEES

TECHNOLOGY

Description Revenue and **Net Investment Adjusted Net** Disbursements for Expenses per Income Income Charitable Books **Purposes** 95,733 SCHOLAR EVENTS 95,733 READING PROGRAM 2,365 2,365 753,999 **AMERICORPS** 753,999

Other Expenses Schedule

HIGH SCHOOL PROGRAM

COLLEGE COUNSELING

SUMMER COLLEGE PROGRAM

SECURITIES LENDING EXPENSE

OFFICE EXPENSE	203,503	0	0	203,503
OUTREACH	38,854	0	0	38,854
MATH PROGRAM	17,684	0	0	17,684

0

43,447

616,022

224,821

43,447

616,022

224,821

Adjusted Net Disbursements for Description Revenue and Net Investment Expenses per Income Income Charitable Books Purposes

46,864

19,415

46.864

19,415

MISCELLANEOUS	

Other Expenses Schedule

LATINO FAMILIES PROGRAM

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -		Di	LN: 93491319049848		
TY 2017 Other Liabilities Schedule						
Name:	SCHULER FAM	ILY FOUNDA	TION	,		
ETIN:	36-4154510					
Description	n		Beginning of Year - Book Value	End of Year - Book Value		
				$\overline{}$		
SECURITY DEPOSITS		1	11,248	5,398		

efile GRAPHIC print - DO NOT PROCESS	As Filed Data	-	DLI	N: 93491319049848			
TY 2017 Other Professional Fees Schedule							
Name: SCHULER FAMILY FOUNDATION							
EIN: 36-4154510							
Category Amount Net Investment Adjusted Net Disbursements							
l careagol à	Amount	Her TilAestillelir	Aujusteu Net	Dispuisements			

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes	

282,608

OTHER PROFESSIONAL FEES

282,608

efile GRAPHIC print - D	O NOT PROCESS	As Filed Data -				DLN: 93491319049848
Schedule B		Schedu	ule of Contributo	rs		OMB No 1545-0047
(Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	► Information a	bout Schedule B (F	ach to Form 990, 990-EZ, or 990-PF e B (Form 990, 990-EZ, or 990-PF) and its instructions is at <u>www irs gov/form990</u>			2017
Name of the organization					Employer i	dentification number
					36-4154510	1
Organization type (che	ck one)					
Filers of:	Section:					
Form 990 or 990-EZ	☐ 501(c)() (enter number) o	rganization			
	☐ 4947(a)(²	1) nonexempt char	ritable trust not treated as	s a private founda	ition	
	☐ 527 politi	cal organization				
Form 990-PF	✓ 501(c)(3)	exempt private fo	undation			
	4947(a)(^	4947(a)(1) nonexempt charitable trust treated as a private foundation				
	☐ 501(c)(3)	taxable private for	undation			
			PF that received, during t omplete Parts I and II Se			
Special Rules						
under sections 5 received from an	09(a)(1) and 170(b)	(1)(A)(vı), that che uring the year, tota	g Form 990 or 990-EZ that cked Schedule A (Form 9 al contributions of the gre plete Parts I and II	990 or 990-EZ), P	art II, line 13,	, 16a, or 16b, and that
during the year,	total contributions of	f more than \$1,000	or (10) filing Form 990 o 0 <i>exclusively</i> for religious, animals Complete Parts	, charitable, scien		
during the year, of If this box is check purpose Don't co	contributions <i>exclus</i> cked, enter here the omplete any of the p	ively for religious, total contributions parts unless the G e	or (10) filing Form 990 o charitable, etc , purposes that were received durin eneral Rule applies to th or more during the year .	s, but no such cor ig the year for an is organization be	ntributions tota exclusively re ecause it rece	aled more than \$1,000 eligious, charitable, etc , eived <i>nonexclusively</i>
990-EZ, or 990-PF), but	ıt must answer "No	on Part IV, line 2	le and/or the Special Rul , of its Form 990, or chec t it doesn't meet the filing	k the box on line	H of its	
For Paperwork Reduction A for Form 990, 990-EZ, or 99		ructions	Cat No 30613X	Sched	ule B (Form 990	0, 990-EZ, or 990-PF) (2017)

Schedule B (Form 990, 990-EZ, or 990-PF) (2017) Page 2 Name of organization Employer identification number SCHULER FAMILY FOUNDATION 36-4154510 Part I Contributors (See instructions) Use duplicate copies of Part I if additional space is needed (d) (a) (b) No. **Total contributions** Type of contribution Name, address, and ZIP + 4 Person JACK SCHULER **Payroll** 100 N FIELD DRIVE SUITE 360 \$ 13,137,894 Noncash LAKE FOREST, IL60045 (Complete Part II for noncash contributions) (a) (b) (c) (d) **Total contributions** No. Name, address, and ZIP + 4 Type of contribution QUIDEL CORPORATION Person Payroll 12544 HIGH BLUFF DRIVE STE 200 \$ 721,280 Noncash SAN DIEGO, CA92130 (Complete Part II for noncash contributions) (b) (c) (a) (d) No. Name, address, and ZIP + 4 **Total contributions** Type of contribution Person **Payroll** Noncash (Complete Part II for noncash contributions) (a) (b) (c) (d) No. **Total contributions** Type of contribution Name, address, and ZIP + 4 Person Payroll Noncash (Complete Part II for noncash contributions) (a) (b) (c) (d) **Total contributions** No. Name, address, and ZIP + 4 Type of contribution Person Payroll Noncash (Complete Part II for noncash contributions) (a) (c) (d) (b) No. **Total contributions** Type of contribution Name, address, and ZIP + 4 Person **Payroll** \$ Noncash (Complete Part II for noncash contributions)

Schedule B (Forr	n 990, 990-EZ, or 990-PF) (2017)		Page 3
Name of organiz		Employer ident	ification number
SCHOLER PAMILY POUNDATION		36-4:	154510
Part II	Noncash Property (See Instructions) Use duplicate copies of Part II if additional space is needed		
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	130,000 SHS MAZOR ROBOTICS LTD	\$ 8 037,900	2017-11-01
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	1,592 SHS MAZOR ROBOTICS LTD	\$ 99,994	2017-11-28
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
2	5,193 SH QUIDEL CORP	\$ 127,433	2017-06-14
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
2	31,164 SHS QUIDEL CORP	\$ 593,847	2017-12-12
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		\$	
		Schedule B (Form	990, 990-EZ, or 990-PF) (2017)

Schedule B (Form 990, 990-EZ, or 990-PF) (2017)