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Form **990-PF** Department of the Treasury Internal Revenue Service

Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation ▶ Do not enter social security numbers on this form as it may be made public. ► Go to www.irs.gov/Form990PF for instructions and the latest information.

For calendar year 2017 or tax year beginning and ending A Employer identification number Name of foundation 47-2753228 PIERCE FAMILY FOUNDATION Room/suite B Telephone number Number and street (or P O box number if mail is not delivered to street address) 505-599-0181 500 WEST BROADWAY City or town, state or province, country, and ZIP or foreign postal code C If exemption application is pending, check here FARMINGTON, NM 87401 Initial return Initial return of a former public charity G Check all that apply: D 1. Foreign organizations, check here Final return Amended return Foreign organizations meeting the 85% test, check here and attach computation Address change Name change X Section 501(c)(3) exempt private foundation Check type of organization: E If private foundation status was terminated 0 Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation under section 507(b)(1)(A), check here X Cash I Fair market value of all assets at end of year | J Accounting method: Accrual If the foundation is in a 60-month termination Other (specify) under section 507(b)(1)(B), check here (from Part II, col. (c), line 16) 2,472,609. (Part I, column (d) must be on cash basis.) ▶\$ Part I **Analysis of Revenue and Expenses** (d) Disbursements (a) Revenue and (b) Net investment (c) Adjusted net (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a)) for charitable purposes (cash basis only) expenses per books ıncome ıncome 0. N/A Contributions, gifts, grants, etc., received Check X If the foundation is not required to attach Sch B Interest on savings and temporary cash investments 1,296 1,296. STATEMENT 71,266 71,266. STATEMENT 4 Dividends and interest from securities 5a Gross rents b Net rental income or (loss) 119,915 6a Net gain or (loss) from sale of assets not on line 10 b Gross sales price for all assets on line 6a 974,260. 119,915 Capital gain net income (from Part IV, line 2) Net short-term capital gain Ö Income modifications 10a Gross sales less returns and allowances b Less Cost of goods sold OGL civ. U c Gross profit or (loss) 11 Other income 192,477 192,477 Total Add lines 1 through 11 0. Compensation of officers, directors, trustees, etc 14 Other employee salaries and wages 15 Pension plans, employee benefits 16a Legal fees 1,785 0 0. STMT 3 **b** Accounting fees 32,627 0 0. STMT c Other professional fees 17 Interest STMT 5 4,768 0. 0. 18 Taxes 19 Depreciation and depletion Occupancy 21 Travel, conferences, and meetings 22 Printing and publications 23 Other expenses
24 Total operating
expenses. Add 24 Total operating and administrative 0 expenses. Add lines 13 through 23 39,180 68,000. 68,000 25 Contributions, gifts, grants paid 26 Total expenses and disbursements 68,000. 107,180 Add lines 24 and 25 27 Subtract line 26 from line 12: 85,297 2 Excess of revenue over expenses and disbursements 192,477 b Net investment income (if negative, enter -0-) N/Ac Adjusted net income (if negative, enter -0-) Form **990-PF** (2017)

| | | 0-PF (2017) PIERCE FAMILY FOUNDATION | | 47-2753228 | | | |
|-----------------------------|--------------|--|-------------------|----------------|---------------------------------------|--|--|
| | art | Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only | Beginning of year | End of | year | | |
| 드 | | | (a) Book Value | (b) Book Value | (c) Fair Market Value | | |
| | | Cash - non-interest-bearing | 0 161 153 | 0.046.450 | 0 450 600 | | |
| | 1 | Savings and temporary cash investments | 2,161,153. | 2,246,450. | 2,472,609. | | |
| | 3 | Accounts receivable | | | | | |
| | ١. | Less: allowance for doubtful accounts | | | | | |
| | 4 | Pledges receivable ► Less: allowance for doubtful accounts ► | | | | | |
| | 5 | Grants receivable | | | | | |
| | 1 - | Receivables due from officers, directors, trustees, and other | | | | | |
| | " | disqualified persons | | Ì | | | |
| | 7 | Other notes and loans receivable | | | | | |
| | ' | Less: allowance for doubtful accounts | | | | | |
| Ŋ | 8 | Inventories for sale or use | | | · · · · · · · · · · · · · · · · · · · | | |
| Assets | 1 | Prepaid expenses and deferred charges | | | | | |
| As | 1 | Investments - U.S. and state government obligations | | | | | |
| | | Investments - corporate stock | | | | | |
| | 1 | Investments - corporate bonds | | | | | |
| | 11 | investments - land, buildings and equipment basis | | | | | |
| | 1 | Less accumulated depreciation | | | | | |
| | 12 | Investments - mortgage loans | | | | | |
| | 13 | Investments - other | | | | | |
| | 14 | Land, buildings, and equipment: basis ▶ | | | | | |
| | | Less accumulated depreciation | | | | | |
| | ı | Other assets (describe ►) | | | | | |
| | 16 | Total assets (to be completed by all filers - see the | | | | | |
| | | instructions. Also, see page 1, item I) | 2,161,153. | 2,246,450. | <u>2,472,609.</u> | | |
| | i | Accounts payable and accrued expenses | | | | | |
| | 18 | Grants payable | | | | | |
| ies | 19 | Deferred revenue | | | | | |
| Liabilities | 20 | Loans from officers, directors, trustees, and other disqualified persons | | | AND A SECOND | | |
| Lia | 21 | Mortgages and other notes payable | | | | | |
| | 22 | Other liabilities (describe) | | | | | |
| | 23 | Total liabilities (add lines 17 through 22) | 0. | 0. | | | |
| | 23 | Foundations that follow SFAS 117, check here | | | | | |
| | | and complete lines 24 through 26, and lines 30 and 31. | | | | | |
| ės | 24 | Unrestricted | | | | | |
| anc | 25 | Temporarily restricted | | | | | |
| Bal | | Permanently restricted | | | | | |
| pu | | Foundations that do not follow SFAS 117, check here | | | | | |
| Ē | 1 | and complete lines 27 through 31 | | | | | |
| S | 27 | Capital stock, trust principal, or current funds | 0. | 0. | | | |
| set | 28 | Paid-in or capital surplus, or land, bldg., and equipment fund | 0. | 0. | | | |
| Net Assets or Fund Balances | 29 | Retained earnings, accumulated income, endowment, or other funds | 2,161,153. | 2,246,450. | | | |
| Ret | 30 | Total net assets or fund balances | 2,161,153. | 2,246,450. | | | |
| | | | 2,161,153. | | | | |
| | 31 | Total liabilities and net assets/fund balances | 2,246,450. | | | | |
| P | art | Analysis of Changes in Net Assets or Fund Ba | alances | | | | |
| _ | | net assets or fund balances at beginning of year - Part II, column (a), line | 30 | | | | |
| ı | | t agree with end-of-year figure reported on prior year's return) | 11 | 2,161,153. | | | |
| 2 | • | amount from Part I, line 27a | | 2 | 85,297. | | |
| | | increases not included in line 2 (itemize) | | 3 | 0. | | |
| | | ines 1, 2, and 3 | | 4 | 2,246,450. | | |
| | | 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 | lumn (b), line 30 | 6 | 2,246,450. | | |
| _ | | | | | Form 990-PF (2017) | | |

| Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), or 4043 - see instructions) | Form 990-PF (2017) PIERCE FAMILY FOUNDATION | | 47-275 | 3228 | } | Page 4 |
|---|---|--------------------|-----------|--------------|--------------|------------------|
| Dates of ruling or determination littler A catach copy of letter if inecessary-see instructions) Domestic foundations that meet the section 4940(e) requirements in Part V, chock here A catach copy of letter if inecessary-see instructions) 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-) 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-) 3 1,925. 3 1,925. 3 1,925. 5 Subbite A (necembra 144 (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 6 | | 940(e), or 4 | 948 - sec | instr | uctio | |
| Dates of ruling or determination littler A catach copy of letter if inecessary-see instructions) Domestic foundations that meet the section 4940(e) requirements in Part V, chock here A catach copy of letter if inecessary-see instructions) 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-) 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-) 3 1,925. 3 1,925. 3 1,925. 5 Subbite A (necembra 144 (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 6 | 1a Exempt operating foundations described in section 4940(d)(2), check here and enter "N/A" on line 1. |) | | | | |
| b Domesto foundations that meet the section 4947(a) requirements in Part V, check here ► X and enter 1% of Part I, lare 27b. And other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, cot. (b). 2 | | ns) | | | | |
| of Part I, line 27b 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-) 3 3 1,925. 4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) 5 Tax based on investment income. Subtract line 4 from lang 3.1 zero or lisss, enter -0- 5 Tax based on investment income. Subtract line 4 from lang 3.1 zero or lisss, enter -0- 5 Exempt foreign organizations: -1 to the form lang 3.1 zero or lisss, enter -0- 5 Exempt foreign organizations: -1 tax withheld at source 6 Death Faymon organizations: -1 tax withheld at source 6 Death application for extension of time to file (Form 8868) 6 C O. 6 Backop withheldsing enroneously withheld 7 Total crodits and payments. Add lines 5 although 64 6 C O. 6 Backop withheldsing enroneously withheld 7 Total crodits and payments. Add lines 5 although 64 6 C O. 6 Backop withheldsing enroneously withheld 7 Total crodits and payments. Add lines 5 although 64 6 C O. 6 Backop withheldsing enroneously withheld 7 Total crodits and payments. Add lines 5 although 64 6 C O. 6 Backop withheldsing enroneously withheld 7 Total crodits and payments. Add lines 5 although 64 6 C O. 6 Backop withheldsing enroneously withheld 7 Total crodits and payments. Add lines 5 although 64 6 C O. 6 Backop withheldsing enroneously withheld 7 Total crodits and payments. Add lines 5 although 64 6 C O. 7 O. 7 O. 8 Enter any payment for undergrayment of self-and tax. Check hore I if Form 2220 is attached 8 A5. 9 Tax due. If the total of lines 5 and 8 is more than 11 the organization of lines 5 and 8 is more than 11 the organization of lines 6 and 8 is more than 11 the organization of lines 6 and 8 is more than 11 the organization of lines 6 and 8 is more than 11 the organization of lines 6 and 8 is more than 11 the organization of lines 6 and 8 is more than 11 the organization of lines 6 and 8 is | | · • | 1_ | _ | 1,9 | 25. |
| 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) Add lines 1 and 2 3 1,925. 4 Subtile A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) 5 Tax based on investment income. Subtract time 4 irom line 3.1 izero or less, enter -0- 5 Tax based on investment income. Subtract time 4 irom line 3.1 izero or less, enter -0- 5 Tax based on investment income. Subtract time 4 irom line 3.1 izero or less, enter -0- 5 Tax based on investment income. Subtract time 4 irom line 3.1 izero or less, enter -0- 5 Tax based on investment income. Subtract time 4 irom line 3.1 izero or less, enter -0- 6 Tax based on investment income. Subtract time 4 irom line 5.1 izero or less, enter -0- 1 ax pad with application for extension of time to file (Form 8868) 6 D 6 D 6 D 6 D 6 D 6 D 6 D 6 D 6 D 6 D 7 Total cradits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax. Profess and 8.1 income time 1.1 income 1.2 income | of Part I, line 27b | 1 | | | | |
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| 5 1, 925. Credits/Payments: 2017 estimated tax payments and 2016 overpayment credited to 2017 5 Exempt foreign organizations - tax withhold at source 6 D. D. Credits/Payments and 2016 overpayment credited to 2017 5 Exempt foreign organizations - tax withhold at source 6 D. D. Credits/Payments and 2016 overpayment organizations - tax withhold at source 6 D. D. Credits/Payments and 2016 overpayment of the Corn 8868) 6 Exemption organizations - tax withhold at source 6 D. D. Credited the State Insurance of the Corn 8868) 6 Exemption organization organization of the control of the Corn 8868) 7 Total credits and payments. Add lines Sa through 60 8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached 8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached 9 1,970. 10 Overpayment film or 7 is more than 16 total of lines 5 and 5, enter the amount overpaid 11 Enter the amount of line 10 to be: Credited to 2016 estimated tax ▶ Refunded ▶ 10 11 The Part VII-A D Statements Regarding Activities 12 During the tax year, dut the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? 14 During the tax year, dut the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign. 15 During the tax year, dut the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign. 15 During the tax year, dut the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign. 16 During the tax year, dut the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political expenditures or the activities. 16 During the asswer is "Yes" to a or 1s, station a detailed description of the activities. 17 During the foun | 3 Add lines 1 and 2 | | 3_ | | 1,9 | 25. |
| 6. Cedis/Payments: 2 20/17 estimated tax payments and 2016 overpayment credited to 2017 b Exempt foreign organizations - tax withheld at source 1 fax paid with application for extension of time to file (Form 8868) 6 e. 0. 6 d. 0. 6 d. 0. 7 7 Total credits and payments. Add lines 6a through 6d 6 e. 0. 7 8 Aschay withholding erraneously withheld 7 7 Total credits and payments. Add lines 6a through 6d 6 e. 0. 7 8 Aschay withholding erraneously withheld 7 8 Aschay withholding erraneously withheld 7 8 Aschay withholding erraneously withheld 8 Aschay withholding erraneously withheld 9 Total credits and payments. Add lines 6a through 6d 9 Total credits and payments. Add lines 6a through 6d 9 Total credits and payments. Add lines 6a through 6d 9 Total credits and payments. Add lines 6a through 6d 9 Total credits and payments. Add lines 6a through 6d 9 Total credits and payments. Add lines 6a through 6d 9 Total credits and payments. Add lines 6a through 6d 11 Enter the amount of line 10 to bic Credited to 2018 estimated tax ▶ 100 11 Enter the amount of line 10 to bic Credited to 2018 estimated tax ▶ 100 11 Enter the amount of line 10 to bic Credited to 2018 estimated tax ▶ 100 11 Enter the amount of line 10 to bic Credited to 2018 estimated tax ▶ 100 11 Enter the amount of line 10 to bic Credited to 2018 estimated tax ▶ 100 11 Enter the amount of line 10 to bic Credited to 2018 estimated tax 12 During the tax eyar, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? 10 bid is spend from than \$100 during the year (either directly or indirectly) for political synchrotics. See the instructions for the definition (if the answer is "Yes" to 1 a or 1b, attach a detailed description of the activities. 1 bid the foundation line Form 1120-POL for this year? 1 to the foundation line Form 1120-POL for this year? 2 to the foundation have unrelated business gross some of \$1,100 or nore during the year? 1 three, states in detail and tericitie | 4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) | | 4 | | | 0. |
| a 2017 estimated tax payments and 2016 overpayment credited to 2017 b Exempt foreign organizations - tax withheld at source c Tax paid with application for extension of time to fife (Form 8868) d Sackup withholding erroneously withheld 7 Total credits and payments. Add lines Sa through 6d 6c 0. 6d 0. 6d 0. 7 Total credits and payments. Add lines Sa through 6d 8 Enter any penalty for underpayment of estimated tax. Check here ☐ If Form 2220 is attached 8 A 5. 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 10 Overpayment If fine 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Enter the amount of line 10 to be; Credited to 2018 estimated tax. ► Part VII-A 1 Statements Regarding Activities 12 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? b Ibid it spend more than 5100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities. c Ibid the foundation high some part of the foundation amangers. ► \$ 0. 2 has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities. 3 has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities. 4 bif "Yes," has if filed a tax return on Form 990-1 for this year? 5 Var been a liquidation, termination, dissolution, or substantial contraction during the year? 11 "Yes," attach a detailed description of See (relating the surface) activities and proven years are a liquidation, termination, dissolution, or substantial contraction during the year? 12 Was there a liquidation, termination, dissol | 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- | | 5_ | | 1,9 | 25. |
| b Exempl foreign organizations - tax withheld at source | 6 Credits/Payments: | | | | | |
| c Tax paid with application for otension of time to file (Form 8868) d Backup withholding erroneously withheld Total credits and payments. Add lines 6a through 6d 8. Enter any penalty for underpayment of estimated tax. There amount owed 9. Tax due. If the total of lines 5 and 8 is more than the 7, enter amount owed 9. Tax due. If the total of lines 5 and 8 is more than the 7, enter amount owed 9. Tax due. If the total of lines 5 and 8 is more than the 7, enter amount owed 10. Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11. Enter the amount of line 10 to be: Credited to 2018 estimated tax. ► Part VII-A Statements Regarding Activities 12. During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? 12. During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? 13. During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? 13. During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? 14. During the did the foundation of the activities and copies of any materials published or distributed by the foundation in connection with the activities. 2. During the foundation in connection with the activities and copies of any materials published or distributed by the foundation of the activities and copies of any materials published or distributed by foundation and in any activities and copies of the activities and copies of any materials published or distributed by foundation during the year? 14. Extent the amount (if any) political expenditures (section 4955) imposed during the year? 15. Was there a fluudation in any activities that have not previously been r | a 2017 estimated tax payments and 2016 overpayment credited to 2017 6a | 0. | | | | |
| d Backup withholding erroneously withheld 7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached 8 A 45. 9 Tax due. If the total of hines 5 and 8 is more than the 10 illnes 5 and 8, enter the amount owed ▶ 9 1,970. 10 Overpayment filthe 7 is more than the total of lines 5 and 8, enter the amount owed ▶ 10 11 Enter the amount of line 10 to be: Gredited to 2018 estimated tax ▶ Refunded ▶ 11 Part VII-A Statements Regarding Activities 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? 1a Way bill of its pend more than \$100 during the year (either directly) or indirectly) for political purposas? See the instructions for the definition if the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and distributed by the foundation in connection with the activities. 1 bill of its pend more than \$100 during the year (either directly) for political purposas? See the instructions for the definition if the answer is "Yes" to 1a or 1b, attach a detailed description of the activities. 1 bill of its pend more than \$100 during the year (either directly) for political purposas? See the instructions for the definition if the answer is "Yes" to 1a or 1b, attach a detailed description of the activities. 1 bill of its pend more than \$100 during the year (either the amount (if any) of tax on political expenditure tax imposed on foundation managers. ▶ \$ 0. (2) On foundation managers. ▶ \$ 0. 1 bill the foundation managers. ▶ \$ 0. (2) On foundation managers. ▶ \$ 0. 2 bill the foundation managers. ▶ \$ 0. (2) On foundation managers. ▶ \$ 0. 2 bill the foundation managers. ▶ \$ 0. (2) On foundation managers. ▶ \$ 0. 3 bill the foundation managers. ▶ \$ 0. (2) On foundation managers. ▶ \$ 0. 4 bill the foundation managers. ▶ \$ 0. (2) On foundation managers. ▶ \$ 0. 5 bill the foundation managers. ▶ | b Exempt foreign organizations - tax withheld at source 6b | | | | | |
| 8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached 8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached 9 Tax due, if the total of hines 5 and 8 is more than the 17, enter amount owed 10 Overpayment if line 7 is more than the total of lines 5 and 8, enter the amount owepaid 11 Tenter the amount of line 10 to be; Cardified to 2018 estimated tax ▶ Refunded 11 Part VII-A Statements Regarding Activities 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? b Did it spend more than 5100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities. c Did the foundation if Form 1120-PDL for this year? (1) On the foundation. ▶ \$ | c Tax paid with application for extension of time to file (Form 8868) | | | | | |
| 8 Enter any penalty for underpayment of estimated tax. Check here | d Backup withholding erroneously withheld 6d | 0. | 1 | | | |
| 10 Overpayment If line 7 is more than tine 7, enter amount owed 11 Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Enter the amount of line 10 to be; Gredited to 2018 estimated tax ▶ Refunded ▶ 11 Part VII-A Statements Regarding Activities 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? 1b Id it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition if the activities and copies of any materials published or distributed by the foundation in connection with the activities. 1c Did the foundation in connection with the activities. 2 Did the foundation Form 1120-PDL for this year? 3 In the foundation Society | 7 Total credits and payments. Add lines 6a through 6d | | 7 | | | 0. |
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| Swas there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: By language in the governing instrument, or By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument? 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 The states to which the foundation reports or with which it is registered. See instructions. NM If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2017 or the tax year beginning in 2017? See the instructions for Part XIV. If "Yes," complete Part XIV Did any persons become substantial contributors during the tax year? If "yes," attach a schedule listing their names and addresses STMT 6 Sx X X If "Yes," attach a schedule listing their names and addresses STMT 6 | | | 37/3 | | | |
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| year 2017 or the tax year beginning in 2017? See the instructions for Part XIV. If "Yes," complete Part XIV 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses STMT 6 10 X | | 12(i)(5) for cale | ndar | - 55 | | |
| 10 Did any persons become substantial contributors during the tax year? if "Yes," attach a schedule listing their names and addresses STMT 6 10 X | | - (//(3) :51 00101 | | 9 | | $_{\rm x}$ ν |
| | | addresses S' | rmr 6 | <u> </u> | Х | |
| | | | | | | (2017) |

| Pa | art VII-A Statements Regarding Activities (continued) | | | |
|----|---|-------------|----------|-------------|
| | | | Yes | No |
| 11 | At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of | | | } |
| | section 512(b)(13)? If "Yes," attach schedule. See instructions | _11_ | | X |
| 12 | Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? | | | · |
| | If "Yes," attach statement. See instructions | 12 | | X |
| 13 | Did the foundation comply with the public inspection requirements for its annual returns and exemption application? | _ 13 | <u>X</u> | L |
| | Website address ► N/A | | 1 0 1 | |
| 14 | The books are in care of ▶ DARRIN CHURCH, CITIZENS TRUST Telephone no. ▶ 505-59 | | TRT | |
| | Located at ► 500 W BROADWAY, FARMINGTON, NM ZIP+4 ►8 | 401 | | |
| 15 | Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here | NT. | /A | • |
| 40 | and enter the amount of tax-exempt interest received or accrued during the year 15 | 14 | Yes | No |
| 16 | At any time during calendar year 2017, did the foundation have an interest in or a signature or other authority over a bank, | 16 | 163 | X |
| | securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the | 10 | | |
| | foreign country | | | |
| Pa | art VII-B Statements Regarding Activities for Which Form 4720 May Be Required | | | |
| | File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. | | Yes | No |
| 18 | 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) 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.) | | | |
| ١ | b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations | ١ ا | | |
| | section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions | 1b | | - |
| | 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 | 10 | | х |
| 2 | before the first day of the tax year beginning in 2017? Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation | 1c | | |
| 2 | defined in section 4942(j)(3) or 4942(j)(5)): | | | |
| , | a At the end of tax year 2017, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning | 1 | | |
| | before 2017? | | | |
| | If "Yes," list the years ▶ 2016 ,, | | | |
| 1 | b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect | | | |
| | valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach | | | |
| | statement - see instructions.) | 2b | X | |
| | c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. | | | |
| | Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time | | | |
| 3 | a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time | | | |
| | during the year? | | | |
| I | b If "Yes," did it have excess business holdings in 2017 as a result of (1) any purchase by the foundation or disqualified persons after | 1 | | |
| | 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, | 0. | | |
| | Form 4720, to determine if the foundation had excess business holdings in 2017.) N/A | 3b 4a | | X |
| | Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that | 40 | | <u> </u> |
| | had not been removed from jeopardy before the first day of the tax year beginning in 2017? | 4b | | х |
| | nad not both formoved from popularly both of the most day of the tax year boginning in East. | rm 996 | DE | |

| Form 990-PF (2017) PIERCE FAMILY FOUNDATION | | | 47-27532 | 28 | Page 6 | |
|--|---|-----------------------------|--|------------------|-------------------|--|
| Part VII-B Statements Regarding Activities for Which F | orm 4720 May Be F | Required (contin | ued) | | | |
| 5a During the year, did the foundation pay or incur any amount to: | | | | Yes | No | |
| (1) Carry on propaganda, or otherwise attempt to influence legislation (section | 1 4945(e))? | Ye | s X No | | ì | |
| (2) Influence the outcome of any specific public election (see section 4955); o | r to carry on, directly or indire | | | | | |
| any voter registration drive? | | | s X No | | | |
| (3) Provide a grant to an individual for travel, study, or other similar purposes' | 7 | Ye | s X No | | 1 | |
| (4) Provide a grant to an organization other than a charitable, etc., organization | n described in section | | s X No | | | |
| 4945(d)(4)(A)? See instructions | 4945(d)(4)(A)? See instructions | | | | | |
| (5) Provide for any purpose other than religious, charitable, scientific, literary, | or educational purposes, or f | for | | | | |
| the prevention of cruelty to children or animals? | Ye | s X No | - 1 | 1 | | |
| b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify und | der the exceptions described i | ın Regulations | İ | | | |
| section 53.4945 or in a current notice regarding disaster assistance? See instru | uctions | | N/A | 5b | | |
| Organizations relying on a current notice regarding disaster assistance, check h | nere | | | | | |
| c If the answer is "Yes" to question 5a(4), does the foundation claim exemption fr | om the tax because it mainta | ıned | i | ľ | İ | |
| expenditure responsibility for the grant? | N | I/A 🔲 Ye | s No | İ | Ì | |
| If "Yes," attach the statement required by Regulations section 53.4945-5(d). | | | | ĺ | ĺ | |
| 6a Did the foundation, during the year, receive any funds, directly or indirectly, to | pay premiums on | | | i | 1 | |
| a personal benefit contract? | | Y6 | s X No | | | |
| b Did the foundation, during the year, pay premiums, directly or indirectly, on a p | ersonal benefit contract? | | I | 6ь | х | |
| If "Yes" to 6b, file Form 8870. | | | | | 3= | |
| 7a At any time during the tax year, was the foundation a party to a prohibited tax s | helter transaction? | □ Ye | s X No | | 1 | |
| b If "Yes," did the foundation receive any proceeds or have any net income attribu | | | . – | 7b | + | |
| Part VIII Information About Officers, Directors, Trust | | nagers. Highly | | | | |
| Paid Employees, and Contractors | 000, 1 0011000111110 | | • | | | |
| 1 List all officers, directors, trustees, and foundation managers and t | heir compensation. | | | | | |
| | (b) Title, and average hours per week devoted | (c) Compensation | (d) Contributions to employee benefit plans and deferred | (e) Ex accoun | pense | |
| (a) Name and address | hours per week devoted to position | (If not paid, enter -0-) | and deferred compensation | accoun | t, other ances | |
| DAVID A PIERCE | PRESIDENT | Cinci o j | compensation | 4110111 | 211000 | |
| PO BOX 2802 | 11101011 | | | | | |
| FARMINGTON, NM 87499 | 0.25 | 0. | 0. | | 0. | |
| | VICE PRESIDEN | | <u></u> | | <u> </u> | |
| PO BOX 5025 | VICE INDED | 1 | | | | |
| GREENEHAVEN, AZ 86040-5025 | 0.25 | .0. | 0. | | 0. | |
| SUSAN NELSON | SECRETARY/TRE | | <u>.</u> | | | |
| 4901 CRESTWOOD DRIVE | DECKETAKI/IKE | MOOKEK | | | | |
| FARMINGTON, NM 87402 | 0.25 | 0. | 0. | | 0. | |
| FARMINGION, NM 6/402 | 0.23 | | <u></u> | | | |
| | | | | | | |
| | - | | | | | |
| 2 Compensation of five highest-paid employees (other than those inc | luded on line 1). If none. | enter "NONE." | <u></u> | | | |
| = | (b) Title, and average | | (d) Contributions to employee benefit plans | (e) Ex | pense | |
| (a) Name and address of each employee paid more than \$50,000 | hours per week devoted to position | (c) Compensation | and deferred | accoun | t, other | |
| NONE | devoted to position | | compensation | allOwe | 111065 | |
| NONE | | | | | | |
| | | | | | | |
| | 1 | | | | | |
| | | | | | | |
| | - | | | | | |
| | | | | | | |
| | - | | | | | |
| | | | | - | | |
| | - | | | | | |
| | <u></u> | | | <u></u> | | |
| Total number of other employees paid over \$50,000 | | | — | 000 55 | 0 | |
| | | | Form | 990-PF | (2017) | |

| | 47-2753228 Page 7 |
|--|--------------------------|
| Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued) | <i>'</i> |
| 3 Five highest-paid independent contractors for professional services. If none, enter "NONE." | |
| (a) Name and address of each person paid more than \$50,000 (b) Type of serving | ice (c) Compensation |
| NONE | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| Total number of others receiving over \$50,000 for professional services |) |
| Part IX-A Summary of Direct Charitable Activities | |
| List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc. | Expenses |
| 1 CONTRIBUTIONS TO EIGHT CHARITIES TO SUPPORT COMMUNITY | |
| PROJECTS | |
| 2 | 68,000 |
| 2 | |
| | |
| 3 | |
| | |
| 4 | · |
| 4 | |
| | |
| Part IX-B Summary of Program-Related Investments | |
| Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2. 1 N/A | Amount |
| I N/A | |
| | |
| 2 | |
| | |
| All other program-related investments. See instructions. | |
| 3 | |
| | |
| | |
| | |
| | |
| Total. Add lines 1 through 3 | ▶ 0. |
| | Form 990-PF (2017 |

| Pi | Int X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations must complete this part. | ndations, | see instructions) |
|----|---|---------------|--------------------|
| 1 | Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: | | |
| | Average monthly fair market value of securities | 1a | 0. |
| b | Average of monthly cash balances | 1b | |
| C | Fair market value of all other assets | 1c | 2,472,609. |
| d | Total (add lines 1a, b, and c) | 1d | 2,472,609. |
| е | 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 | <u> </u> |
| 3 | Subtract line 2 from line 1d | 3 | 2,472,609. |
| 4 | Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) | 4 | 37,089. |
| 5 | Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 | 5 | 2,435,520. |
| 6 | Minimum investment return. Enter 5% of line 5 | 6 | 121,776. |
| P | Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations a | nd certain | |
| | foreign organizations, check here 🕨 🔲 and do not complete this part.) | | |
| 1 | Minimum investment return from Part X, line 6 | 1 | 121,776. |
| 2a | Tax on investment income for 2017 from Part VI, line 5 | . | |
| b | Income tax for 2017. (This does not include the tax from Part VI.) | | |
| C | Add lines 2a and 2b | 2c | 1,925. |
| 3 | Distributable amount before adjustments. Subtract line 2c from line 1 | 3 | 119,851. |
| 4 | Recoveries of amounts treated as qualifying distributions | 4 | 0. |
| 5 | Add lines 3 and 4 | 5 | 119,851. |
| 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 | 119,851. |
| P | art XII Qualifying Distributions (see instructions) | | |
| 1 | Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes: | | |
| а | Expenses, contributions, gifts, etc total from Part I, column (d), line 26 | 1a | 68,000. |
| b | Program-related investments - total from Part IX-B | 1b | 0. |
| 2 | Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes | 2 | |
| 3 | Amounts set aside for specific charitable projects that satisfy the: | | |
| a | Suitability test (prior IRS approval required) | 3a | |
| b | Cash distribution test (attach the required schedule) | _3b | |
| 4 | Qualifying distributions Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4 | 4 | 68,000. |
| 5 | Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment | | |
| | income. Enter 1% of Part I, line 27b | 5 | 1,925. |
| 6 | Adjusted qualifying distributions. Subtract line 5 from line 4 | 6 | 66,075. |
| | Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation | qualifies for | the section |
| | 4940(e) reduction of tax in those years. | | |

Part XIII Undistributed Income (see instructions)

| | (a) Corpus | (b) Years prior to 2016 | (c) 2016 | (d) 2017 |
|---|---------------|--|-------------|--------------------|
| 1 Distributable amount for 2017 from Part XI, | | | | |
| line 7 | | | | 119,851. |
| 2 Undistributed income, if any, as of the end of 2017 | | | | |
| a Enter amount for 2016 only | | | 70,312. | |
| b Total for prior years: | | | | |
| | | 0. | | |
| 3 Excess distributions carryover, if any, to 2017: | | | | |
| a From 2012 | | | | |
| b From 2013 | | | | |
| c From 2014 | | | | |
| d From 2015 | | | | |
| e From 2016 | | | | |
| f Total of lines 3a through e | 0. | | | |
| 4 Qualifying distributions for 2017 from | | | | |
| Part XII, line 4: ► \$ 68,000. | | | | |
| a Applied to 2016, but not more than line 2a | | | 68,000. | |
| 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 2017 distributable amount | | · <u>-</u> · · · · · · · · · · · · · · · · · · · | | 0. |
| e Remaining amount distributed out of corpus | 0. | | | |
| 5 Excess distributions carryover applied to 2017 (If an amount appears in column (d), the same amount must be shown in column (a)) | 0. | | | 0. |
| 6 Enter the net total of each column as indicated below: | | | | |
| a Corpus Add lines 3f, 4c, and 4e Subtract line 5 | 0. | | | |
| b Prior years' undistributed income. Subtract | | | | |
| line 4b from line 2b | | 0. | | |
| c Enter the amount of prior years' | | · · · · · · · · · · · · · · · · · · · | | |
| undistributed income for which a notice of | | | | |
| deficiency has been issued, or on which | | | | |
| the section 4942(a) tax has been previously assessed | | 0. | | |
| d Subtract line 6c from line 6b. Taxable | | | | |
| amount - see instructions | | 0. | | |
| e Undistributed income for 2016. Subtract line | | | | |
| 4a from line 2a. Taxable amount - see instr. | | | 2,312. | |
| f Undistributed income for 2017. Subtract | | | | |
| lines 4d and 5 from line 1. This amount must | | | | |
| be distributed in 2018 | | | | 119,851. |
| 7 Amounts treated as distributions out of | | | | |
| corpus to satisfy requirements imposed by | | | | |
| section 170(b)(1)(F) or 4942(g)(3) (Election | | | | |
| may be required - see instructions) | 0. | | | |
| 8 Excess distributions carryover from 2012 | | | | |
| not applied on line 5 or line 7 | 0. | | | |
| 9 Excess distributions carryover to 2018. | | | | |
| Subtract lines 7 and 8 from line 6a | 0. | | | |
| 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 | | <u></u> | Ll | Form 000-DE (0017) |

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| | FAMILY FOUN | | | | 753228 Page 10 |
|---|-----------------------------|-----------------------------|-----------------------------|----------------------------|--|
| Part XIV Private Operating F | | | -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 Check box to indicate whether the found | | g foundation described i | | 4942(j)(3) or4 | 1942(j)(5) |
| 2 a Enter the lesser of the adjusted net | Tax year | | Prior 3 years | T | |
| income from Part I or the minimum | (a) 2017 | (b) 2016 | (c) 2015 | (d) 2014 | (e) Total |
| investment return from Part X for | | | | | |
| each year listed | | | | | |
| b 85% of line 2a | | | | | |
| c Qualifying distributions from Part XII, | | | | | |
| line 4 for each year listed | | | | | |
| d Amounts included in line 2c not | | | | | |
| used directly for active conduct of | | | | | |
| exempt activities | | | | | |
| e Qualifying distributions made directly | | | / | | |
| for active conduct of exempt activities | | | | | |
| Subtract line 2d from line 2c | | | | | |
| 3 Complete 3a, b, or c for the | | | / | | |
| alternative test relied upon: | | | | | |
| a "Assets" alternative test - enter: | | | | | } |
| (1) Value of all assets | | , | / | | |
| (2) Value of assets qualifying | | | | | |
| under section 4942(j)(3)(B)(i) | | | | | |
| b "Endowment" alternative test - enter 2/3 of minimum investment return | | | | | |
| shown in Part X, line 6 for each year | | | | | |
| listed | | | | | |
| c "Support" alternative test - enter: | | | | | |
| (1) Total support other than gross | | | İ | | |
| investment income (interest, | | | | | |
| dividends, rents, payments on securities loans (section | | | | | |
| 512(a)(5)), or royalties) | / | | | | |
| (2) Support from general public | | | | | |
| and 5 or more exempt | | | | | |
| organizations as provided in section 4942(j)(3)(B)(iii) | | | | | |
| (3) Largest amount of support from | / | | | | |
| an exempt organization | | | | | |
| (4) Gross investment income | / | | | | |
| Part XV Supplementary Info | rmation (Complet | e this part only | if the foundation | had \$5 000 or m | ore in assets |
| at any time during t | | | ii tiio ioaiiaatioii | παα φο,σσο σι π | |
| 1 Information Regarding Foundation | | | | | |
| a List any managers of the foundation wh | • | han 2% of the total cont | ributions received by the | foundation before the cl | oce of any tay |
| year (but only if they have contributed n | | | indutions received by the | iodituation before the ch | JSG OF ALLY LAX |
| NONE | νοιο πιαπι φο,σουγι (σου σο | | | | |
| | a sum 100/ or mass of the | a stock of a corporation | for an agually large postu | an of the awarrahin of a | nartnership or |
| b List any managers of the foundation wh other entity) of which the foundation has | | | or an equally large portion | on of the ownership of a p | Jai thership of |
| 3,7 | ou 1070 or grouter interes | • | | | |
| NONE | | | | | |
| 2 Information Regarding Contributi | | | _ | | |
| Check here X if the foundation of the foundation makes gifts, grants, etc., | | | | | uests for funds. If |
| | | | | | |
| a The name, address, and telephone num | ber or email address of the | e person to whom applic | ations should be addres | sed: | |
| | | | | | |
| | | | | | |
| b The form in which applications should b | e submitted and informati | on and materials they sh | rould include: | | |
| | | | | | |
| c Any submission deadlines: | | | | | |
| | | | | | |
| d Any restrictions or limitations on awards | s, such as by geographica | l areas, charitable fields, | kinds of institutions, or | other factors: | |
| | | | | | |
| | | | | | |

| Part XVI-A | Analysis of | Income-Producing | Activities |
|------------|-------------|------------------|-------------------|
| | | | |

| nter gross amounts unless otherwise indicated. | Unrelated bu | Isiness income | | y section 512, 513, or 514 | (e) |
|--|--------------------------|-------------------------|--|----------------------------|-------------------|
| 3 | (a) Business | (b) | (C) Exclu- | (d) | Related or exempt |
| 1 Program service revenue: | code | Amount | sion | Amount | function income |
| a | | | | | |
| b | | | | | |
| C | | | | | |
| d | , , | | | | |
| e | 1 | | | | |
| f | | | | | |
| g Fees and contracts from government agencies | | | | | |
| 2 Membership dues and assessments | | | | | |
| 3 Interest on savings and temporary cash | | | | | |
| investments | 900099 | 1,296. | | | |
| 4 Dividends and interest from securities | | | 14 | 71,266. | |
| 5 Net rental income or (loss) from real estate: | | | | | |
| a Debt-financed property | | | | | |
| b Not debt-financed property | | | | | |
| 6 Net rental income or (loss) from personal | | | | | |
| property | | ······ | | | |
| 7 Other investment income | | | <u> </u> | | |
| 8 Gain or (loss) from sales of assets other | | | } | | |
| than inventory | 900099 | <u>119,915.</u> | | | |
| 9 Net income or (loss) from special events | | | | | |
| O Gross profit or (loss) from sales of inventory | | | | | |
| 1 Other revenue: | | | | | |
| a | | | }}- | | |
| b | | | | | |
| <u> </u> | | | | | |
| d | | | | | |
| 2 Subtotal. Add columns (b), (d), and (e) | | 121,211. | | 71,266. | 0 |
| 3 Total Add line 12, columns (b), (d), and (e) | <u> </u> | 141,411. | 1 | 13 | 192,477 |
| See worksheet in line 13 instructions to verify calculations | - \ | | | 13 | 134,411 |
| | | | | | |
| Part XVI-B Relationship of Activitie | es to the Accom | plishment of Ex | empt Pu | ırposes | |
| Line No. Explain below how each activity for which | income is reported in co | olumn (e) of Part XVI-A | contributed | importantly to the accomp | lishment of |
| the foundation's exempt purposes (other t | | ` ' | | , | |

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| | the foundation's exempt purposes (other than by providing funds for such purposes). | |

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|---------------|--|--|----------------|-----------------------------------|--|---------------------------------------|----------------------------|--------------|------------|
| Part | | | ers to a | nd Transactions ar | d Relations | hips With Nonch | aritable | , | |
| | Exempt Organ | | | | | | | V | l NI - |
| | the organization directly or ind | | | | n described in sec | tion 501(c) | | res | No |
| • | her than section 501(c)(3) orga | • | _ | - | | | ŀ | | |
| | insfers from the reporting found | lation to a noncharitable | e exempt org | anization of: | | | 4.40 | | 37 |
| • • | Cash | | | | | | 1a(1) | | X |
| | Other assets | | | | | | 1a(2) | | X |
| | ner transactions: | | | | | | | | ٠, |
| ٠, ٠ | Sales of assets to a noncharita | · - | | | | | 1b(1) | | X |
| , , | Purchases of assets from a no | · - | anization | | ` | | 1b(2) | - | X |
| | Rental of facilities, equipment, | | | | | | 1b(3) | 1 | X |
| | Reimbursement arrangements | S | | | | | 1b(4) | | X |
| | Loans or loan guarantees | | | | | | 1b(5) | | X |
| | Performance of services or m | | | | | | 1b(6) | | X |
| | aring of facilities, equipment, m | | | | | | <u> </u> | <u></u> | X |
| | he answer to any of the above is | | | | | | | sets, | |
| | services given by the reporting | | | ed less than fair market value | e in any transactio | n or sharing arrangemen | it, show in | | |
| | umn (d) the value of the goods, | | | avamet organization | (4) 5 | | | | |
| (a) Line r | (b) Amount involved | (c) Name of no | | exempt organization | (U) Descriptio | n of transfers, transactions, a | ind sharing ai | rangeme | ents |
| - | | | N/A | | | · · · · · · · · · · · · · · · · · · · | | | |
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| | the foundation directly or indirec | = | | or more tax-exempt organiz | ations described | | \Box | T ** | ¬ |
| | section 501(c) (other than section | | ion 5277 | | | | Yes | LA | No |
| <u>b</u> If " | Yes," complete the following scl | | ı | (h) Type of organization | · - · · · · - · · - · | (c) Description of relation | nehin | | |
| | (a) Name of or | ganization | | (b) Type of organization | · · · · · · · · · · · · · · · · · · · | (c) Description of relation | лізпір | | |
| | N/A | | | | | · | | | |
| | <u> </u> | | | | | | | | |
| | | | - | | | | | | |
| | | | | | | | | | |
| | Under perantes of payury, I declare | e that have ever ined this re | etura includin | g accompanying schedules and s | statements, and to the | a best of my knowledge = | | | |
| Sign | I and haliff it is trul Yarrast and as | | | taxpayer) is based on all informa | | | May the IRS return with th | discuss i | this er |
| Here | | l La . | X | 12/27/18 | PRESI | | shown below | ? See in | str |
| | Signature of officer or truste | <u>-</u> | _ | Date | Title | TITA T | LX Yes | | J No |
| | Print/Type preparer's r | | Preparer¦6 si | | Date | Check If PTI | N | | |
| | Trinivity po preparer st | | opai 0:30 31 | J | , | self- employed | | | |
| Paid | CHATINIA DO | ~ur \ | 10. | Kol | 3/26/18 | | 00132 | 251 | |
| Prep | arer SHAUNA ROC | | MPANY | LLP | - 110 | Firm's EIN ▶ 85- | | | |
| | Firm s name - CHA | ייים אים החודיני א ע | we din i | 1111 | | Timesum > 05 | 55500 | J 0 | |

(505)327-5052

Phone no.

Use Only

Firm's address ► 2900 N. HUTTON

FARMINGTON, NM 87402

| Part IV Capital Gains and Losses for Tax on Investment Inc | ome | | |
|---|--|---|---|
| (a) List and describe the kind(s) of propert 2-story brick warehouse; or common sto | (b) How acquired P - Purchase D - Donation | (c) Date acquired (d) Date sold (mo., day, yr.) | |
| 12 COLUMBIA DIVIDEND INCOME | | 01/27/1706/14/17 | |
| b DELAWARE SMALL CAP CORE | | | VARIOUS 01/26/17 |
| C DIAMOND HILL LONG SHORT | | | |
| d DREYFUS OPP MIDCAP VALUE | | | VARIOUS 01/26/17 VARIOUS 01/26/17 |
| e HARBOR INTERNATIONAL FUND | | VARIOUS 06/07/17 | |
| PRINCIPAL MC S&P 400 | | | VARIOUS 01/26/17 |
| g TEMPLETON GLOBAL BOND FUND A | D | | VARIOUS 01/26/17 |
| h DIAMOND HILL LONG SHORT | | | VARIOUS 01/26/17 |
| GATEWAY FUND | | 04/14/1609/15/17 | |
| HARBOR INTERNATIONAL FUND | | VARIOUS 06/07/17 | |
| k ISHARES CORE S&P MID CAP | | | 04/28/1609/15/17 |
| I ISHARES CORE S&P MID CAP | | | 04/28/1612/13/17 |
| m ISHARES CORE S&P SMALL CAP | | | 04/28/1609/15/17 |
| n ISHARES CORE S&P SMALL CAP | | | 04/28/1612/13/17 |
| o TEMPLETON GLOBAL BOND FUND A | D | | VARIOUS 01/26/17 |
| (f) Depreciation allowed | (g) Cost or other basis | | Gain or (loss) |
| (e) Gross sales price (or allowable) | plus expense of sale | | lus (f) minus (g) |
| a 10,000. | 9,368. | | 632. |
| b 134,017. | 116,418. | | 17,599. |
| <u>c</u> 2,043. | 1,989. | | 54. |
| d 131,725. | 120,952. | - | 10,773. |
| e 10,615. | 9,205. | | 1,410. |
| f 127,767. | 122,605. | | 5,162. |
| g 8,673. | 8,218. | | 455. |
| h 49,348. | 43,029. | | 6,319. |
| 1 30,027. | 26,985. | | 3,042. |
| 257,094. | 209,348. | | 47,746. |
| k 20,936. | 3,163. | | |
| 1 33,024. | 25,919. | | 7,105. |
| m 9,489. | 7,812. | | 1,677. |
| n 22,887. | | 5,528. 9,287. | |
| o 111,615. | | | |
| Complete only for assets showing gain in column (h) and owner | d by the foundation on 12/31/69 | | ses (from col. (h)) |
| o 111,615. | | | of col. (h) gain over col. (k), not less than "-0-") |
| a | | | 632. |
| b | | | 17,599. |
| С | | | 54. |
| d | | | 10,773. |
| e | | | 1,410. |
| f | | | 5,162. |
| g | | | 455. |
| h | | | 6,319. |
| | | | 3,042. |
| | | | 47,746. |
| k | | | 3,163. |
| | | | 7,105. |
| m | | · · | 1,677. |
| n | | | 5,528. |
| 0 | | | 9,287. |
| | enter in Part I, line 7 | | |
| | enter in Part I, line 7 er "-0-" in Part I, line 7 | | |
| 3 Net short-term capital gain or (loss) as defined in sections 1222(If gain, also enter in Part I, line 8, column (c). | 5) and (6): | | |
| If (loss), enter "-0-" in Part I, line 8 | J 3 | | |
| χ μ | | | |

| (a) List and | describe the kind(s) of property so ick warehouse; or common stock, 2 | ld, e.g., real estate, | (b) How acquired P - Purchase D - Donation | (c) Date acquired (mo., day, yr.) | (d) Date sold (mo., day, yr.) | |
|---|---|---|--|---|----------------------------------|--|
| 1a WELLS FARGO AD | P | 07/18/16 | 09/15/17 | | | |
| b WELLS FARGO AD | V | | P | 07/18/16 | | |
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| (e) Gross sales price | (f) Depreciation allowed (or allowable) | (g) Cost or other basis plus expense of sale | (e) (| (h) Gain or (loss) (e) plus (f) minus (g) | | |
| a 14,649. | | 14,685. | | | <36. | |
| b 351. | | 352. | | | <1. | |
| <u>c</u> <u>d</u> | | | | · · · · · · · · · · · · · · · · · · · | | |
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| <u>m</u> | | | | | | |
| <u>n</u> | | | | | | |
| 0 | | | | | | |
| Complete only for assets showin | ng gain in column (h) and owned by | | (I) Los | sses (from col. (h)) | (t.) | |
| (i) F.M.V. as of 12/31/69 | (j) Adjusted basis as of 12/31/69 | (k) Excess of col. (i) over col. (j), if any | but r | Gains (excess of col. (h) gain over col. (k), but not less than "-0-") | | |
| a | | | | | <u> <36.</u> | |
| b | | | | | <1. | |
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| n | | | | | | |
| 0 | | | | | | |
| 2 Capital gain net income or (net ca | | r in Part I, line 7 O-" in Part I, line 7 | 2 | | 19,915. | |
| 3 Net short-term capital gain or (los if gain, also enter in Part I, line 8, if (loss), enter "-0-" in Part I, line 8 | column (c). | nd (6): | | N/A | | |
| וו (וטשש), בוווכו יטי ווו רמונו, וווופ ס | <i>)</i> | <i>)</i> | 3 | TA \ W | | |

47-2753228

PIERCE FAMILY FOUNDATION

Part XV Supplementary Information Grants and Contributions Paid During the Year (Continuation) If recipient is an individual, Recipient Purpose of grant or show any relationship to Foundation Amount any foundation manager or substantial contributor contribution status of Name and address (home or business) recipient ST DAVID'S EPISCOPAL CHURCH N/A PUBLIC CHARITY TO SUPPORT CHARITABLE ACTIVITIES 72 SOUTH 200 EAST 5,000, SALT LAKE CITY, UT 84111 ST JOHN'S EPISCOPAL CHURCH PUBLIC CHARITY TO SUPPORT CHARITABLE N/A 312 N ORCHARD AVE ACTIVITIES FARMINGTON, NM 87401 1,000. WASATCH ACADEMY N/A PUBLIC CHARITY TO SUPPORT CHARITABLE ACTIVITIES 120 SOUTH 100 WEST SMOUNT PLEASANT, UT 84647 10,000. Total from continuation sheets 16 000.

| FORM 990-PF INTERE | ST ON SAVI | IGS AND TEM | PORARY | CASH I | NVESTMENTS | STATEMENT | 1 |
|--|-----------------|------------------------------|-------------------------------|--------------------------|------------------------------|-------------------------------|----|
| SOURCE ———————————————————————————————————— | | REVE | (A) REVENUE PER BOOKS 1,296. | | (B) NVESTMENT NCOME | (C) ADJUSTED NET INCOME | |
| | | | | | 1,296. | | |
| TOTAL TO PART I, LII | NE 3 | | 1,296. | | 1,296. | | |
| FORM 990-PF | DIVIDENDS | S AND INTER | EST FF | ROM SECU | RITIES | STATEMENT | 2 |
| SOURCE | GROSS AMOUNT | CAPITAL GAINS DIVIDEND | GAINS REVENUE NET INVEST | | | - ADJUSTED | |
| CITIZENS TRUST CORPORATION | 71,266 | • | 0. | 71,266 | . 71,26 | 56. | |
| TO PART I, LINE 4 | 71,266 | | 0. | 71,266 | . 71,26 | 56. | |
| FORM 990-PF | | ACCOUNTI | NG FE | ⊈S | | STATEMENT | 3 |
| DESCRIPTION | | (A) EXPENSES PER BOOKS | NET] | (B) INVEST- INCOME | (C) ADJUSTED NET INCOM | | |
| ACCOUNTING ANG LEGAL | L FEES | 1,785. | | 0. | | | 0. |
| TO FORM 990-PF, PG | 1, LN 16B | 1,785. | | 0. | | | 0. |
| FORM 990-PF | 07 | THER PROFES | SIONAI | - FEES | | STATEMENT | 4 |
| DESCRIPTION | | (A) EXPENSES PER BOOKS | NET] | (B) INVEST- INCOME | (C) ADJUSTED NET INCOM | | |
| AGENCY FEES | | 32,627. | | 0. | | | 0. |
| TO FORM 990-PF, PG | 1. LN 16C | 32,627. | | 0. | | | 0. |

| FORM 990-PF | TAX | ES | S | STATEMENT 5 | | |
|--|------------------------------|-----------------------------------|-------------------------------|----------------------------|-------------------|--|
| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITAB PURPOSE | | |
| OTHER TAX EXPENSE FOREIGN TAX INCOME TAX | 2,488. 777. 1,503. | 0. | | | 0 . 0 . 0 . | |
| TO FORM 990-PF, PG 1, LN 18 | 4,768. | 0. | | , | 0. | |
| FORM 990-PF LIST O | F SUBSTANTIA PART VII-A, | L CONTRIBUTORS | 5 5 | TATEMENT | 6 | |
| NAME OF CONTRIBUTOR | ADDR | ESS | | | | |
| MARTIN & BEVERLY PIERCE TRUS | | W BROADWAY INGTON, NM 874 | 101 | | | |