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

# Return of Private Foundation or Section 4947(a)(1) Trust Treated as 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.

2017

For	cale	ndar year 2017 or tax year beginning		, and ending		
Na	me of	foundation			A Employer identification	number
		SE AND ASHLEY ANDERSON			81-3597705	
		and street (or P O box number if mail is not delivered to street	address)	Room/suite	B Telephone number	
_		SOUTH COURT STREET		610	(256)767-0	740
	•	own, state or province, country, and ZIP or foreign p RENCE , AL 35630	ostal code		C If exemption application is p	ending, check here
		all that apply: Initial return	Initial return of a fo	ormer public charity	J D 1. Foreign organizations	check here
•	,,,,,,,,	Final return	Amended return	ormor public onarity	1. Foreign organizations	s, circux ricic
		Address change	Name change		Foreign organizations me check here and attach co	eting the 85% test,
H	heck	type of organization: X Section 501(c)(3) ex		- M	E If private foundation stat	-
	] Se		Other taxable private founda	ation	under section 507(b)(1)	
l Fa	ır ma	arket value of all assets at end of year   J Accounti	ng method: X Cash	Accrual	F If the foundation is in a 6	• •
(f	rom F	Part II, col. (c), line 16)	her (specify)		under section 507(b)(1)	
<b>→</b>	\$	358,783. (Part I, colun	nn (d) must be on cash bası	s.)		
Pa	art I	Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
	1	Contributions, gifts, grants, etc., received	125,000.		N/A	
	2	Check If the foundation is not required to attach Sch. B				
	3	Interest on savings and temporary cash investments	158.	158.		STATEMENT 1
	4	Dividends and interest from securities	3,837.	3,837.		STATEMENT 2
	5a	Gross rents				
	b	Net rental income or (loss)				
ō	6a	Net gain or (loss) from sale of assets not on line 10 Gross sales price for all	3,361.			
Revenue	_b	assets on line 6a		2 261		<u> </u>
Ř	7	Capital gain net income (from Part IV, line 2)		3,361.		
	8	Net short-term capital gain				
	9   10a	Income modifications Gross sales less returns				
		and allowances Less Cost of goods sold				
	l	Gross profit or (loss)				
	11	Other income				
	12	Total. Add lines 1 through 11	132,356.	7,356.	<del></del>	<del></del>
	13	Compensation of officers, directors, trustees, etc	0.	0.		0.
	14	Other employee salaries and wages				
ιn.		Pension plans, employee benefits				
ıses		Legal fees				
ē.		Accounting fees STMT 3	3,680.	205.		3,475.
ũ	l	Other professional fees				
Ě		Interest			RECEIVE	
and Administrative Expens		Taxes Depreciation and depletion			MAY (2 5) 20	18 9
Ē	20	Occupancy			WAY (2 3) ZI	110 171
Adn	21	Travel, conferences, and meetings				
ď	22	Printing and publications		<u> </u>	CODEN,	
ğ	23	Other expenses STMT 4	479.	27.		452.
atin	24	Total operating and administrative				
Operating		expenses. Add lines 13 through 23	4,159.	232.		3,927.
ō	25	Contributions, gifts, grants paid	11,000.			3,927.
	26	Total expenses and disbursements.				
		Add lines 24 and 25	15,159.	232.		14,927.
		Subtract line 26 from line 12:				
		Excess of revenue over expenses and disbursements	117,197.			
		Net investment income (if negative, enter -0-)		7,124.		<u></u>
	<u>c</u>	Adjusted net income (if negative, enter -0-)	<u></u>		N/A	

Part II Balance Sheets Attached schedules and amounts in the description	Beginning of year	End of y	
Column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
1 Cash - non-interest-bearing			
2 Savings and temporary cash investments	238,016.	259,123.	259,123.
3 Accounts receivable ▶			
Less: allowance for doubtful accounts			
4 Pledges receivable ►			
Less: allowance for doubtful accounts			
5 Grants receivable			
6 Receivables due from officers, directors, trustees, and other			
disqualified persons			
7 Other notes and loans receivable			
Less: allowance for doubtful accounts			
8 Inventories for sale or use			
9 Prepaid expenses and deferred charges			
10a Investments - U.S. and state government obligations			
b Investments - corporate stock STMT 5	0.	96,090.	99,660.
c Investments - corporate bonds			
11 Investments - land, buildings, and equipment basis			_
Less accumulated depreciation	· i		
12 Investments - mortgage loans			
13 Investments - other			
14 Land, buildings, and equipment basis ▶			
Less accumulated depreciation	-	-	
15 Other assets (describe ► )			
16 Total assets (to be completed by all filers - see the			
instructions. Also, see page 1, item I)	238,016.	355,213.	358,783.
17 Accounts payable and accrued expenses			
18 Grants payable			
. Lag. Defended assume			
20 Loans from officers, directors, trustees, and other disqualified persons 21 Mortgages and other notes payable			
21 Mortgages and other notes payable			
22 Other liabilities (describe )			
23 Total liabilities (add lines 17 through 22)	0.	0.	
Foundations that follow SFAS 117, check here			
and complete lines 24 through 26, and lines 30 and 31.			
24 Unrestricted			
25 Temporarily restricted 26 Permanently restricted Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.			
26 Permanently restricted			
Foundations that do not follow SFAS 117, check here			
and complete lines 27 through 31.			
27 Capital stock, trust principal, or current funds	0.	0.	
28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
28 Paid-in or capital surplus, or land, bldg., and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 30 Total net assets or fund balances	238,016.	355,213.	
30 Total net assets or fund balances	238,016.	355,213.	
]			
31 Total liabilities and net assets/fund balances	238,016.	355,213.	
Part III Analysis of Changes in Net Assets or Fund Ba	lances		
Total net assets or fund balances at beginning of year - Part II, column (a), line 3	)	<del></del>	
(must agree with end-of-year figure reported on prior year's return)		1	238,016
Enter amount from Part I, line 27a		2	11 7, 197
Other increases not included in line 2 (itemize)		3	0
Add lines 1, 2, and 3		4	35 5,213
Decreases not included in line 2 (itemize)		5	0
Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, colu	ımn (b), line 30	6	35 5, 213
	· · · · · · · · · · · · · · · · · · ·		Form <b>990-PF</b> (2017

2-story brick w	the kind(s) of property sold (for example) arehouse; or common stock, 200 st		te,	( <b>6)</b> H P - D -	ow acquired Purchase Donation	(c) Date ac (mo., day	quired , yr.)	(d) Date sold (mo., day, yr.)
1a								
b SEE ATTACHED	STATEMENTS							
d	<del></del>							
e	<del></del>							
(e) Gross sales price	(f) Depreciation allowed (or allowable)		st or other basis expense of sale			(h) Gair ((e) plus (i	or (loss) f) minus (	
a b		-						
C		<b>-</b>		1				
d e 100,337.		<del>                                     </del>	96,970	6.				3,361
Complete only for assets shown	ng gain in column (h) and owned by	the foundation	on 12/31/69.			(I) Gains (Col.		
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69		cess of col. (1) col. (j), if any			ol. (k), but not Losses (fr	t less than om col. (f	1-0-) or 1))
				$\bot$				
				$\perp$				
		-		$\dashv$				
				_				3,361
<u>-</u>	C If goin also ente	nr in Dort I line		╮┼				3,301
Capital gain net income or (net ca				<b>}</b>	2			3,361
		ınd (6):		1				
	column (c).			M			NT / A	
	nder Section 4940(e) for	r Reduced	Tax on Net	Inve	stment in	come	N/A	
Yes," the foundation doesn't qualit	fy under sectio <u>n 4</u> 940(e). Do not co	mplete this part	t.				_	Yes X N
(a) Base period years	(b)			(c)	able-use assets	5 (00	Distribi	(d) ution ratio ded by col. (c))
2016		3,255.			9,974			6.34198
2015								
2014								
						_		
2012								
Total of line 1, column (d)						2		6.34198
		on line 2 by 5.0	), or by the number	r of ye	ears	3		6.34198
		line 5						287,97
	10 do	iiic o					·	
						3		
Enter 1% of net investment incon	ne (1% of Part I, line 27b)					6		71
Add lines 5 and 6						7		L,826,418
a b c c d d d d d d d d d d d d d d d d d	14,92							
See the Part VI instructions.	i line 7, check the box in Part VI, line	e 1b, and comp	iete that part using	a 1%	tax rate.			

Part VI   Excise Tax Based on Investment Income (Section 4940(a), 4940(b), or 4548 - see instructions)	Form 990-PF (2017) CHASE AND ASHLEY ANDERS				Page 4
Date of value or determination letter:	<del></del>		e instri	uction	ıs)
b Domestic foundations that annext the section 4940(e) requirements in Part V, check here		and enter "N/A" on line 1.			
of Part I, line 27b  All other domestic foundations enter 2% of time 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 Add lines 1 and 2  Subtille 4, (nacone) bax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter-0-)  5 Tax based on investment income. Subtract line 4 from line 3.1 trace or less, enter-0-  5 Tax based on investment income. Subtract line 4 from line 3.1 trace or less, enter-0-  5 Tax based on investment income. Subtract line 4 from line 3.1 trace or less, enter-0-  5 Tax based on investment income. Subtract line 4 from line 3.1 trace or less, enter-0-  5 Tax based on investment income. Subtract line 4 from line 3.1 trace or less, enter-0-  6 BaxPup variety organizations-1 sav withheld at source  6 Bax D O				-	
and Nother domestic foundations entar 2% of time 27h. Exempt foreign organizations, enter 4% of Part I, Imp 27, cot. (b).  2 Tax under excision 511 (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)  3 Add lines 1 and 2  4 Subtitle 4, (income) bax (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-  6 Cerdisch Payments;  2 017 estimated tax payments and 2016 overpayment credited to 2017  8 a 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	b Domestic foundations that meet the section 4940(e) requirements in Part V,	', check here ▶ 🔲 and enter 1% 👂 📗 1	_	1	42.
2 Tax under section 511 (domestic section 4947(a)(1) hrusts and taxable foundations only; others, enter -0-) 3 1 42. 4 Subtitle A (income) tax (domestic section 4947(a)(1) hrusts and taxable foundations only; others, enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3.1 (2x or of less, enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3.1 (2x or of less, enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3.1 (2x or of less, enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3.1 (2x or of less, enter -0-) 6	of Part I, line 27b				
3 Add less 1 and 2 Subtitis 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 line 3.1 / 200 or less, enter-0- 6 Cerebis/Payments; 2 a017 estimated tax payments and 2016 overpayment credited to 2017  Exempt foreign organizations - tax withheld at source 1 Cax paid with application for architection of the life form 8888) 6 6 0 0. 6 Backup withhelding erroneously withheld 6 0 0. 7 Total credits and payments. Add lines 5a through 6d 8 Einter any penalty for underpayment of estimated fax. Check here ☐ if Form 2220 is attached 9 Tax dee If the total of lines 5 and 8 is more than line 7, enter amount overed 9 1 42. 10 Overpayment if the 7s more than the total of lines 5 and 6, enter the mount overpaid 11 Enter the amount of line 10 to be: Credited to 2018 estimated tax ► 12 Enter the amount of line 10 to be: Credited to 2018 estimated tax ► 13 Enter the amount of line 10 to be: Credited to 2018 estimated tax ► 14 Enter the amount of line 10 to be: Credited to 2018 estimated tax ► 15 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 participated or intervene in any political campaign?  1a During the tax year, did the foundation attempt to influence any nationals, state, or local legislation or did it participated or intervene in any political campaign?  1b Life the manural of the foundation intervene in any political campaign or the state of the content of the foundation intervene in the form 1120-POL for this year?  1b Life the foundation intervene in the form 1120-POL for this year?  2 Life the remolurishment of a detai	c All other domestic foundations enter 2% of line 27b. Exempt foreign organiz	zations, enter 4% of Part I, line 12, col. (b).			
Subtilis 4 (norme) tax (domestic section 447(a)(1) trusts and baselle (oundations only; others, enter -0-)  5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-  6 Cerdits/Payments:  a 2017 estimated tax payments and 2016 overpayment credited to 2017  b Exempt foreign organizations - Lax withheld at source  6 B D O -  1 Exempt foreign organizations - Lax withheld at source  6 B D O -  1 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  9 Tax due If the total of lines 5 and 68 is more than line 7, enter amount owed  9 1 142.  10 Overpayment If time 7 is more than the total of lines 5 and 6, enter the amount owerpaid  11 Eater the amount of line 10 to be, Cerdited to 2018 estimated tax. ►  Part VII-A Statements Regarding Activities  1a Juring the tax year, did the foundation attempt to influence any national, state, or local legislation or did if participate or interview in any political campaign?  b Did if spend more than 5100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition if the animal state of the activities and copies of any materials published or distributed by the foundation an connection with the activities.  10 the foundation his Form 1120-POL for this year?  4 Enter the enablement (if any) of tax on pointical expenditures (section 4955) imposed during the year:  (1) On the foundation. ► S O . (2) On foundation managers. ► S O . (2) On foundation managers. ► S O . (3) The foundation managers of the calculation managers of the activities and copies of any materials published or distribution made any changes, not previously reported to the IRS?  If Yes, attach a detailed description of the activities.  1 Has the foundation engaged in any activities that have not previously penalties the lines of the calculation of the activities.  1 Has the foundation engaged in any ac	2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foun	ndations only; others, enter -0-) 2			0.
Subtlike A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-  1	3 Add lines 1 and 2	3		1/	<u>42.</u>
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-  Creditor Payments:  2 017 estimated tax payments and 2016 overpayment credited to 2017  b Exempt foreign originazions - tax withheld at source  Tax paid with application for credension of time to lite (Form 8868)  d Backup withholding erroneously withheld  G 0.  Total credits and payments. Add lines sa through 6d  Form 2220 is attached  Tax due If the lotal of lines 5 and 8 is more than line 7, enter amount ower  Tax due If the lotal of lines 5 and 8 is more than line 7, enter amount ower or lines 5 is more than line 10 to the credited to 2018 estimated tax ►  Part VII-A Statements Regarding Activities  Tar Tax due If the lotal of lines 5 and 8 is more than line 7, enter amount ower paid  If Enter the amount of line 10 to the Credited to 2018 estimated tax ►  Part VII-A Statements Regarding Activities  Tax due If the lotal of lines 5 and 8 is more than line 7, enter amount ower paid  If the line amount of line 10 to the Credited to 2018 estimated tax ►  Part VII-A Statements Regarding Activities  Tax due If the loundation activities and solve the loundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?  Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition if the answer is "Nes" to 1 a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in excitives.  Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition if the part of the spendition in the form 1120-POL for this year?  If we shall be foundation in the cornection with its excitives.  Be lent the removement (if any) of tax on political expendation of the activities.  A bill the foundation have unrelated business gioss income of \$1,000 or more during the	4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable four	ndations only; others, enter -0-)			0.
6. Credits/Payments: a 2017 estimated tax payments and 2016 overpayment credited to 2017 b. Exempt for each grant auth applications - tax withheld at source 6 Tax paid with application for extension of time to file (Form 8968) 6 C O. 6 C O. 6 C O. 7 Total credits and payments. Add lines 6a through 6d 6 C O. 9 Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed 7 Total credits and payments of estimated tax. Check here □ if Form 2220 is attached 8 O. 9 Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed 9 142. 10 Overpayment It line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 Tax due If the total of lines 5 and 8, enter the amount overpaid 10 Overpayment It line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Tax or more than 10 total of lines 5 and 8, enter the amount overpaid 12 Enter the amount of line 10 to be Credited to 2018 estimated tax. 14 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did if participate or intervene in any political campaign? 1 a puring the tax year, did the foundation attempt to influence any national, state, or local legislation or did if participate or intervene in any political campaign? 1 a puring the tax is "Yes" to 1 a or 1b, attach a detailed description of the activities. 2 Did the foundation life Form 1120-POL for this year? 3 Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: 3 (1) On the foundation. ► \$ O. (2) On foundation managers. ► \$ O. 4 Enter the rembursement (1 any) pad by the foundation during the year of political expenditure tax imposed on foundation managers. ► \$ O. 4 Enter the rembursement (1 any) pad by the foundation during the year of political expenditure tax imposed on foundation managers. ► \$ O.  4 Enter the amount (if any) of tax on political expenditures (1 any) pad by the foundation during the year of political expenditures (1 any) pad by the found		· · · · · · · · · · · · · · · · · · ·		1	<u>42.</u>
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c Tax paid with application for extension of time to file (Form 8868) d Backup withholding perioneously withheld Total credits and payments. Add lines 6a through 6d 8 Enter the panalty for underpayment of estimated tax. Check here ☐ if form 2220 is attached 8 0.9 9 1 14 2. 10 Overpayment If fine 7 is more than the total of lines 5 and 8, enter the amount owerd 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. Oredited to 2018 estimated tax 11 Enter the amount of line 10 to be. Oredited to 2018 estimated tax 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? 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 did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition 1I the answer is "Yes" to 1 a or 1b, attach is detailed description or the activities and copies of any materials published or distributed by the foundation in connection with the activities. 2 Did the foundation in connection with the activities. 3 D. C. 4 Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. P. S. O. (2) On foundation managers. S. S. O. 4 Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. S. S. O. 4 Enter the reimbursement (if any) paid by the foundation during the year?  15 Was there a liquidation, terrimation, dissolution, or substantial contraction during the year?  16 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either;  17 By language in the governing instrument, or Sylva the foundation have critical business gross is more of \$1,000 or more du					
d Backup withholding ernneously withheld 7 Total credits and payments. Add line 58 through 60 8 0. 9 Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed 9 142. 10 Overpayment If line 7 is more than the total of lines 5 and 8. Is more than line 7, enter amount owed 11 Enter the amount of line 10 to bit. Credited to 2018 estimated tax ▶ 10 11 Enter the amount of line 10 to bit. Credited to 2018 estimated tax ▶ Refunded 11  Part VII-A Statements Regarding Activities 1 burning the tax year, did the boundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? 1 but it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition if the amount of the 310 during the year (either directly or indirectly) for political purposes? See the instructions for the definition if the amount (if any) of tax on political expenditures (section 4955) imposed during the year: 1 (1) On the foundation file Form 1120-POL for this year? 2 feater the amount (if any) of tax on political expenditures (section 4955) imposed during the year: 1 (1) On the foundation N ≥ S 0 . (2) On foundation managers. ▶ S 0 . 2 that the foundation engaged in any activities that have not previously been reported to the IRS? 1 ft/ves, 'taked a detailed description of the activities. 3 Has the foundation have unrelated business gross sincene of \$1,000 or more during the year? 4 but fives,' has a filled a tax return on Form 990-T for this year? 4 but fives,' has a filled a tax return on Form 990-T for this year? 5 Was there a fluvidation, dissolution of substantial contraction during the year? 1 ft yes, 'taked and ediabled description of the activities. 4 but the unduration have unrelated business gross sincene of \$1,000 or more during the year? 5 Was there a fluvidation, dissolution of substantial contraction during the year? 6 Are the requirements of section 508(6) (relating to sections \$441					
7 Total credits and payments. Add lines 6a through 6d 8 Enter any peanly for underpayment of estimated tax. Check here ☐ if Form 2220 is attached 9 Tax due if the total of lines 5 and 8 is more than line 7, enter amount owed 9 1 4 2. 10 Overpayment if line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 Items amount of line 10 to be: Credited to 2018 estimated tax ▶ Refunded ▶ 10 11 Enter the amount of line 10 to be: Credited to 2018 estimated tax ▶ Refunded ▶ 11  Part VII-A   Statements Regarding Activities 1a During the tax year, did the foundation alternpt 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 alternpt 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 alternpt 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 alternpt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?  1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition II the answer is "Yes" to 1a or 1b, attach a detailed description of the activities.  1c Did the foundation file Form 1120-POL for this year?  1c X  1c If Yes, attach and you file x on political expenditure tax imposed during the year.  1c X  2 X  1d State the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ S  1c X  2 X  3 X  4 But the foundation engaged in any activities that have not previously been reported to the IRS?  1f Yes, attach a detailed description of the activities.  2 X  3 X  4 But the foundation engaged in any activities that have not previously reported to the IRS?  1f Yes, attach th	•				
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached ☐ if For					0
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3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes  4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?  b If "Yes," has it filed a tax return on Form 990-T for this year?  W/A  5 Was 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  7 X  8a Enter the states to which the foundation reports or with which it is registered. See instructions.  AL  b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation  9 is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2017 or the tax year beginning in 2017? See the instructions for Part XIV. If "Yes," complete Part XIV  9 X  10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses			<u>                                   </u>	† †	<del></del>
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			10	1	X
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Part VII-A Statements Regarding Activities (continued)			
Ad Abandon da an anadali fa aban da dhaanada dha a a a and ii da aban dha ii	$\vdash$	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of	1		x
section 512(b)(13)? If "Yes," attach schedule. See instructions  12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges?	11		
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	Х	
Website address ► N/A			
14 The books are in care of ► ABROMS & ASSOCIATES, PC  Telephone no. ► (256)	767	-07	40
Located at ▶ 201 SOUTH COURT STREET, STE 610, FLORENCE, AL ZIP+4 ▶35			
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here		▶	
and enter the amount of tax-exempt interest received or accrued during the year	N	/A	
16 At any time during calendar year 2017, did the foundation have an interest in or a signature or other authority over a bank,		Yes	
securities, or other financial account in a foreign country?	16		X
See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the			
foreign country			
Part VII-B   Statements Regarding Activities for Which Form 4720 May Be Required	, ,		
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.	$\perp \perp$	Yes	No
1a During the year, did the foundation (either directly or indirectly):	]		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?  Yes X No		1	,
(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?  Yes X No			
(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?  Yes X No			
(4) Pray compensation to, or pay of reminduse 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.)	( 1		
<b>b</b> If any answer is "Yes" to 1a(1)-(6), did <b>any</b> of the acts fail to qualify under the exceptions described in Regulations			
section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions N/A	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			
before the first day of the tax year beginning in 2017?	1c		X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation			_
defined in section 4942(j)(3) or 4942(j)(5)):			
a At the end of tax year 2017, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning			
before 2017? Yes X No			
If "Yes," list the years			
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect			
valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach	ا ا		
statement - see instructions.)  N/A	2b		
c If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here.			
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time			
during the year?	}		
b If "Yes," did it have excess business holdings in 2017 as a result of (1) any purchase by the foundation or disqualified persons after			
May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose			
of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C,			
Form 4720, to determine if the foundation had excess business holdings in 2017.)  N/A	3ь		
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that			$\vdash$
had not been removed from jeopardy before the first day of the tax year beginning in 2017?	4b		х
	rm <b>99</b> (	)-PF	(2017)

DIRECTOR

0.00

(b) Title, and average

hours per week devoted to position

0.

(c) Compensation

0

(d) Contributions to employee benefit plans and deferred compensation

<u> </u>						0
For	m	990	)-F	F	(20	17)

0.

(e) Expense account, other

allowances

201 SOUTH COURT STREET

Total number of other employees paid over \$50,000

AL 35630

(a) Name and address of each employee paid more than \$50,000

FLORENCE,

NONE

STE

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

Form 990-PF (2017) CHASE AND ASHLEY ANDERSON FOUNDATION	81-3	597705	Page 7
Part VIII Information About Officers, Directors, Trustees, Foundation M Paid Employees, and Contractors (continued)	anagers, Highly		
3 Five highest-paid independent contractors for professional services. If none, enter "NONE	, u		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Com	pensation
NONE			
Total number of others receiving over \$50,000 for professional services		<u> </u>	0
Part IX-A   Summary of Direct Charitable Activities			
List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information of the state of the st	nation such as the	Expenses	
number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	·		
1 N/A			
			0.
2	<del></del>		
3			
4			
D. J.W. D.L.			
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	4.5	Amount	
1 N/A	u 2.	Aillouit	
			0.
2			
All other program-related investments. See instructions.			
3			

Total. Add lines 1 through 3

Part X Minimum Investment Return (All domestic foundations must complete this part. F	oreign foundations, se	e instructions)
1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a Average monthly fair market value of securities	1a	144,339.
b Average of monthly cash balances	1b	148,023.
c Fair market value of all other assets	1c	
d Total (add lines 1a, b, and c)	10	292,362.
e Reduction claimed for blockage or other factors reported on lines 1a and		
1c (attach detailed explanation)	0.	
2 Acquisition indebtedness applicable to line 1 assets	2	0.
3 Subtract line 2 from line 1d	3	292,362.
4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	4,385.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	287,977.
6 Minimum investment return. Enter 5% of line 5	6	14,399.
Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating for	undations and certain	
foreign organizations, check here  and do not complete this part.)		
1 Minimum investment return from Part X, line 6	1	14,399.
2a Tax on investment income for 2017 from Part VI, line 5	142.	
b Income tax for 2017. (This does not include the tax from Part VI.)		
c Add lines 2a and 2b	2c	142.
3 Distributable amount before adjustments. Subtract line 2c from line 1	3	14,257.
4 Recoveries of amounts treated as qualifying distributions	4	0.
5 Add lines 3 and 4	5	14,257.
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	14,257.
Part XII Qualifying Distributions (see instructions)		
1 Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1a	14,927.
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	14,927.
5 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment		
income. Enter 1% of Part I, line 27b	5	0.
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	14,927.
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	
4940(e) reduction of tax in those years		

Form **990-PF** (2017)

# Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2016	(c) 2016	<b>(d)</b> 2017
1 Distributable amount for 2017 from Part XI,	<u>.</u>	·		4.4.055
line 7				14,257.
2 Undistributed income, if any, as of the end of 2017	<u> </u>		0.	
a Enter amount for 2016 only b Total for prior years:			0.	
g rotal for prior years.		0.		
3 Excess distributions carryover, if any, to 2017:		0.		
a From 2012				
b From 2013				
c From 2014			•	
dFrom 2015				
eFrom 2016 63,057.				
f Total of lines 3a through e	63,057.			
4 Qualifying distributions for 2017 from				
Part XII, line 4: ►\$ 14,927.				
a Applied to 2016, but not more than line 2a			0.	
<b>b</b> Applied to undistributed income of prior	-			
years (Election required - see instructions)		0.		
c Treated as distributions out of corpus				
(Election required - see instructions)	0.			
d Applied to 2017 distributable amount				14,257.
e Remaining amount distributed out of corpus	670.			
5 Excess distributions carryover applied to 2017	0.			0.
(If an amount appears in column (d), the same amount must be shown in column (a) )				
6 Enter the net total of each column as indicated below:		i		
<b>2</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5	63,727.			
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.			0.	
f Undistributed income for 2017. Subtract				
lines 4d and 5 from line 1. This amount must				0
be distributed in 2018				0.
7 Amounts treated as distributions out of				
corpus to satisfy requirements imposed by				
section 170(b)(1)(F) or 4942(g)(3) (Election	0.			
may be required - see instructions)  8 Excess distributions carryover from 2012	<u>_</u>	····		
not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2018.	<u></u>			
Subtract lines 7 and 8 from line 6a	63,727.			
10 Analysis of line 9:	<u> </u>			
a Excess from 2013				
b Excess from 2014				
c Excess from 2015				
dExcess from 2016 63,057.				
e Excess from 2017 670.				
				- 000 DE (0017)

Part XIV   Private Operating F	oundations (see in			N/A	7705 Page 10
1 a If the foundation has received a ruling of			17, question 9)	N/A	
foundation, and the ruling is effective fo					
b Check box to indicate whether the found		•	in contion	4040(1)(0) 0= 1 40/4	(A)(E)
2 a Enter the lesser of the adjusted net	Tax year	I I I I I I I I I I I I I I I I I I I	Prior 3 years	4942(j)(3) or 494	2(j)(5)
income-from Part I or the minimum	(a) 2017	(b) 2016	(c) 2015	(d) 2014/	(e) Total
investment return from Part X for	(4)2011	(8)2010	(0)2010	(0)2017	
each year listed	<u> </u>		<del> </del>	<del>                                     </del>	
b 85% of line 2a				<del>-   _/ </del>	
c Qualifying distributions from Part XII,					
line 4 for each year listed	<del></del>		<del>                                     </del>	4	
d Amounts included in line 2c not	į	l		1	
used directly for active conduct of					
exempt activities				<del> +</del>	
e Qualifying distributions made directly			<i>[</i>		
for active conduct of exempt activities.					
Subtract line 2d from line 2c 3 Complete 3a, b, or c for the	<u> </u>		<i></i>		
alternative test relied upon:	1			1	
a "Assets" alternative test - enter:	İ				
(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	
(1) Total support other than gross	<u>/</u> :				
investment income (interest,					
dividends, rents, payments on			ļ		
securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public				-	<del></del>
and 5 or more exempt					
organizations as provided in section 4942(j)(3)(B)(III)					
(3) Largest amount of support from			<del></del>	<del>                                     </del>	
an exempt organization		•			
(4) Gross investment income	/		<del></del>	<del> </del>	
Part XV   Supplementary Info	rmation (Comple	te this part only	if the foundation	n had \$5,000 or mor	e in assets
at any time during t				• •	
1 Information Regarding Foundation	n Managers:			<del></del>	
a List any managers of the foundation wh		than 2% of the total cont	ributions received by the	e foundation before the close	of any tax
year (but only if they have contributed in	nore than \$5,000). (See s	ection 507(d)(2).)	-		·
CHARLES C. ANDERSON	III				
<ul> <li>b List any managers of the foundation who other entity) of which the foundation has</li> </ul>	o own 10% or more of the s a 10% or greater interes	e stock of a corporation ( st.	(or an equally large port	ion of the ownership of a par	tnership or
NONE					
2 Information Regarding Contributi	ion, Grant, Gift, Loan,	Scholarship, etc., Pr	ograms:		
Check here ▶ X if the foundation o	nly makes contributions t	o preselected charitable	organizations and does	not accept unsolicited reques	sts for fun <b>d</b> s. If
the foundation makes gifts, grants, etc.,	to individuals or organiza	itions under other condit	ions, complete items 2a	, b, c, and d.	
a The name, address, and telephone num	ber or email address of th	e person to whom applic	ations should be addres	ssed:	
<b>b</b> The form in which applications should b	e submitted and informat	ion and materials they st	nould include:		
c Any submission deadlines;			<del></del>		
d Any restrictions or limitations on awards	s, such as by geographica	ıl areas, charıtable fields,	kinds of institutions, or	other factors:	

Page 11

3 Cranto and Contributions Raid During the	Voor or Approved for Future	Daymant		T
3 Grants and Contributions Paid During the Recipient	If recipient is an individual	Payment		<del> </del>
Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of	Purpose of grant or contribution	Amount
	or substantial contributor	recipient		<del>                                     </del>
a Paid during the year				
SHEPHERD CENTER FOUNDATION	NONE	PUBLIC CHARITY	BENEVOLENT DONATION	
2020 PEACHTREE ROAD, NW				
ATLANTA, GA 30309	_ <del>_</del>		<del></del>	5,000.
			j	) <sub>i</sub>
URBAN HOPE COMMUNITY CHURCH	NONE	PUBLIC CHARITY	BENEVOLENT DONATION	
P.O. BOX 53				1
FAIRFIELD, AL 35064				6,000.
			l.	
		Ì		
Total			► 3a	11,000.
b Approved for future payment				
NONE				]
		<del>                                     </del>		
				1
	<del>-</del>	<del>                                     </del>		<del>                                     </del>
	1			
Total		<u> </u>	L	
Total	<del> </del>		<b>▶</b> 3b	0. Form <b>990-PF</b> (2017)
				ruitti <b>330-F F</b> (2017)

Form 990-PF (2017) CHASE

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

Enter gross amounts unless otherwise indicated.	Unrelated	ousiness income		y section 512, 513, or 514	(e)	
	(a) Business	(b)	(C) Exclu-	(d)	Related or exempt	
1 Program service revenue:	Rusiness	Amount	sion code	Amount	function income	
			+ + -			
a b						
d	-					
e	_		<del>-                                    </del>			
f			+ +			
g Fees and contracts from government agencies						
2 Membership dues and assessments		<del></del>	<del>-                                     </del>			
3 Interest on savings and temporary cash						
investments			14	158.		
4 Dividends and interest from securities			14	3,837.		
5 Net rental income or (loss) from real estate:				<del>`</del> <del> </del>		
a Debt-financed property			+ + +	·		
b Not debt-financed property						
6 Net rental income or (loss) from personal						
property			1 1			
7 Other investment income						
8 Gain or (loss) from sales of assets other						
than inventory			18	3,361.		
9 Net income or (loss) from special events						
O Gross profit or (loss) from sales of inventory						
1 Other revenue:				·		
a						
b						
c						
d						
e						
12 Subtotal. Add columns (b), (d), and (e)			0.	7,356.	0	
13 Total. Add line 12, columns (b), (d), and (e)				13	7,356	
See worksheet in line 13 instructions to verify calculations.)						

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes).						
<del></del>							

	Exempt Organ	nizations							
1 Did th	e organization directly or ind	irectly engage in an	y of the followi	ng with any other organizat	ion described in sec	tion 501(c)		Yes	No
	than section 501(c)(3) orga								
a Trans	fers from the reporting found	lation to a noncharit	able exempt o	rganization of:					1
(1) C	ash						1a(1)		X
(2) 0	other assets						1a(2)		X
	transactions:								
(1) S	ales of assets to a noncharita	able exempt organiz	ation				16(1)		X
(2) P	urchases of assets from a no	oncharitable exempt	organization .				1b(2)		X
(3) R	ental of facilities, equipment,	or other assets					1b(3)		X
(4) R	eimbursement arrangements	3					1b(4)		X
	oans or loan guarantees								X
(6) P	erformance of services or me	embership or fundra	using solicitation	ons			1b(6)		X
c Snarin	ng of facilities, equipment, ma	alling lists, other ass	ets, or paid en	nployees			1c		X
	answer to any of the above is							ets,	
	vices given by the reporting f in (d) the value of the goods,				iue in any transactio	n or snaring arrange	ment, snow in		
(a)Line no	(b) Amount involved			e exempt organization	(d) December				
(C) Cirio (io	(B) Allount involved	(e) Hante (	N/A	c exempt organization	(u) Descriptio	n of transfers, transactk	ons, and snaring arr	angeme	nts
		<del> </del>	14/44			<del></del>	<del></del>		<del></del>
	· · · · · · · · · · · · · · · · · · ·						<del> </del>		
	· · · · · · · · · · · · · · · · · · ·	<del> </del>	·				<del> </del>		
					<del></del>		<del> </del>		
				· - · · · · · · · · · · · · · · · · · ·			····		
	<del></del>		··· -·································	·			· // · / · · · · · · · · · · · · · · ·		
			·····	· · · · · · · · · · · · · · · · · · ·			· . · · . ·		
							· · · · · · · · · · · · · · · · · · ·		
			<del>~~~</del>	·····		· · · · · · · · · · · · · · · · · · ·	<del></del>		
		<u> </u>							
	foundation directly or indirect			or more tax-exempt organ	ızatıons described		_		_
	ion 501(c) (other than section		ection 527?				Yes	X	] No
b If Yes,	, complete the following sch		<del> </del>	Table 1	, <del></del>				
	(a) Name of org	anization		(b) Type of organization		(c) Description of re	lationship		<del> </del>
	N/A				ļ		<del> </del>		
<del></del>					<b></b>		<del></del>		
<del></del>	<del></del>	·					<del></del>		
· · · · · · · · · · · · · · · · · · ·				<del> </del>			<del></del>		
Un	ider penalties of perjury. Lideclare	that I have examined th	is return, includin	o accompanying schedules and	statements and to the	best of my knowledge			
Sign and	d belief, it is true, correct and con	nplete Declaration of p	reparer (other than	n taxpayer) is based on all inform	nation of which prepare	r has any knowledge	May the IRS d	prepare	er :
Here		_		15/12/18	DIREC'	r∩p	shown below?	See ins	str
1 5	signature of officer or trustee	<del></del>		Date Date	Title	IOR	_ X Yes	ا	No
	Print/Type preparer's na		Preparer's s	ionature	Date	Check if	PTIN		
			Kanda	Hoofman		self- employed			
Paid	KAYLA HOOF	MAN		HOOFMAN	05/08/18	. ,,	P01450	067	
Prepare	Firm's name ABR				F-7,7,9	Firm's EIN ▶ 6			
Use Onl	ly	=		•					
	Firm's address ▶ P .	O. BOX 14	26	<del></del>			<del> </del>		
	FL	ORENCE, A	L 3563	1		Phone no. 25	6-767-0	740	
					<del></del>	<del></del>	Form <b>990</b>		(2017)

	oo ioi iux on mitoodiioiit moonio				
(a) List and d	lescribe the kind(s) of property sold k warehouse; or common stock, 20	l, e.g., real estate,	(b) How acquired P - Purchase	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
		o ana. MILO OU.	D - Donation	\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\	• •
	A US COR EQ			04/19/17	
	US COR EQ		P	05/09/17	
	A US COR EQ A INTL COR EQ		P	06/12/17 04/19/17	09/01/17
			P	04/19/17	$\frac{09/07/17}{00/07/17}$
			P	05/09/17 $06/12/17$	$\frac{09/07/17}{00/07/17}$
				06/12/17 $07/10/17$	$\frac{09/07/17}{00/07/17}$
g 112.167 SHS. DF.			P	0//10/1/	$\frac{09}{00}$
	OPACIFIC GRW F2 OPACIFIC GRW F2		P	04/19/17 05/09/17	$\frac{09/07/17}{00/07/17}$
	OPACIFIC GRW F2 OPACIFIC GRW F2	<del></del>	P P	05/09/17 $06/12/17$	$\frac{09}{00}$
	PACIFIC GRW F2			06/12/17	
	OPACIFIC GRW F2		P	07/13/17	
	WORLD			05/09/17	
	WORLD			05/09/17 $06/12/17$	$\frac{09}{09} \frac{07}{17}$
	WORLD			07/10/17	$\frac{09}{00}$
O 17.045 SHS. NEW		(-) Ot			03/01/11
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale		) Gain or (loss) lus (f) minus (g)	
a 11,496.		11,000.			496.
b 1,523.		1,495.			28.
c 4,019.		4,000.			19.
d 4,454.		4,000.			454.
e 1,632.		1,535.			97.
f 1,985.		1,900.			85.
g 1,551.		1,475.			76.
h 4,467.		4,000.			467.
1,650.		1,555.			95.
1,872.		1,800.			72.
k 148.		140.			8.
1,526.		1,445.			81.
n 173.		161.			12.
n 107.		100.			7.
0 1,144.		1,075.			69.
Complete only for assets showing	gain in column (h) and owned by the	ne foundation on 12/31/69		ses (from col. (h))	
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (ı) over col. (j), if any		of col. (h) gain over ot less than "-0-")	col. (k),
a					496.
b		· · · · ·		-	28.
c	-		<del>-</del>		19.
d					454.
e					97.
f					85.
g					76.
h			<del></del> -		467.
1					95.
1					72.
k					8.
1					81.
n					12.
n			<del></del>		7.
0					69.
·	14 1	- De-41 1 7			
2 Capital gain net income or (net capit	tal loss) { If gain, also enter in the loss in the los	n Part I, line / " in Part I, line 7 }	2		
Net short-term capital gain or (loss)	as defined in sections 1222(5) and				
If gain, also enter in Part I, line 8, co	lumn (c).	· ·	3		

Capital Gains and Losses for Tax on Investment Income (b) How acquired (a) List and describe the kind(s) of property sold, e.g., real estate, (d) Date sold (c) Date acquired P - Purchase D - Donation 2-story brick warehouse; or common stock, 200 shs. MLC Co. (mo., day, yr.) (mó., day, yr.) 1a 75.280 SHS. AMERICAN GLOBAL BALANCED 06/12/1709/07/17 P b 5.653 SHS. CAPITAL INCOME BUILDER P 06/12/1709/07/17 33.188 SHS. CAPITAL INCOME BUILDER 07/10/1709/07/17 P 04/19/1709/07/17 d 984.848 SHS. LORD ABBETT P 04/19/1709/07/17 VNGRD FTSE DEV MKTS ETF P e 105 SHS. 35 SHS. VNGRD FTSE DEV MKTS ETF P 05/09/1709/07/17 g 10 FTSE DEV 06/12/1709/07/17 SHS. VNGRD MKTS P ETF FTSE DEV P 07/10/1709/07/17 SHS. VNGRD MKTS ETF h 75 TTL STK MKT ETF 04/19/1709/07/17 1 90 SHS. VNGRD P 15 VNGRD TTL STK MKT ETF P 05/09/1709/07/17 SHS. 30 SHS. VNGRD TTL STK MKT ETF P 06/12/17/09/07/17 750.469 04/19/1709/07/17 SHS. METWEST T/R BD  $\overline{P}$ m 214.556 SHS. METWEST T/R BD P 05/09/1709/07/17 06/12/1709/07/17 n 187.441 SHS. METWEST P T/R BD 07/10/1709/07/17 <sub>0</sub> 350.753 SHS. METWEST T/R BD  $\overline{P}$ (f) Depreciation allowed (g) Cost or other basis (h) Gain or (loss) (e) Gross sales price (or allowable) plus expense of sale (e) plus (f) minus (g) 43. 2,424. 2,381. 354. 350 4. b <del>53.</del> 2,079. 2,026. C 4,225. 4,245.  $\overline{<20.}>$ d 4,505. 4,089. 416. 1,502. 73. 1,429. <u>14.</u> <u>429.</u> 415. 3,218.  $1\overline{32}.$ 3,086. h 516. 11,381. 10,865. 1,897. 49. 1,848. 48. 3,794. 3,746. k 8,083. 83. 8,000. 2.311.<u>41.</u> 2,270 m <u> 19</u>. 2,019. 2,000. n <u>53.</u> 3.778. 3.725. 0 Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 (I) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), (j) Adjusted basis (k) Excess of col. (i) (i) F.M.V. as of 12/31/69 but not less than "-0-") as of 12/31/69 over col. (j), if any 43. 4. b <u>53.</u> <del><20.</del>> ď 416. е 73. 14. 132. 516. 49. 48. 83. 41. m <u>19.</u> П 53. { If gain, also enter in Part I, line 7 } If (loss), enter "-0-" in Part I, line 7 } 2 Capital gain net income or (net capital loss) 2 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): if gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8

(a) List an 2-story t	nd describe the kind(s) of property sol prick warehouse; or common stock, 2	d, e.g., real estate, 00 shs. MLC Co.	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a 407.166 SHS. T	TEMPLE GLB BD ADV	<u>s</u>	P	04/19/170	9/07/17
	TEMPLE GLB BD ADV		P	05/09/170	· · · · · · · · · · · · · · · · · · ·
	TEMPLE GLB BD ADV		P	06/12/170	
	TEMPLE GLB BD ADV			07/10/170	
e			<del></del> -	0 . , = 0 , = . , 0	
f		· ·			
g		· ·		<del> </del>	
h				<del> </del>	
1	<del> </del>	<del></del>		<del>                                     </del>	
1					
k	-	<del></del>			
<u> </u>	-	<del></del>	_		
m	<del>-</del>		<del>-</del>		
n		<del></del>	-		
0	<del></del>		-		
	(f) Depreciation allowed	(g) Cost or other basis		Gain or (loss)	
(e) Gross sales price	(or allowable)	plus expense of sale	(e) (e)	lus (f) minus (g)	
a 4,898.	l '	5,000.	(-) F	( )	<del>&lt;102.</del> >
$\frac{a}{b}$ 1,324.		1,365.			$\frac{\langle 102.\rangle}{\langle 41.\rangle}$
c 1,381.		1,400.			<19·>
d 2,988.		3,055.			<del>&lt;67.</del> >
e 2,300.		3,033.	•		
f	-				
	-				
<u>g</u> h					
<u>"</u>					
]	-				
<u> </u>	<u> </u>				
	-				
m	-				
n		-			
0		-	<del></del>	-	
	Ing gain in column (h) and owned by t	he foundation on 12/31/69	(1) 1 00	ses (from col. (h))	
	(j) Adjusted basis	(k) Excess of col. (i)	Gains (excess o	of col. (h) gain over (	col. (k).
(i) F.M.V. as of 12/31/69	as of 12/31/69	over col. (j), if any	but n	ot less than "-0-")	
a		· · · · · · · · · · · · · · · · · · ·	·		<102.>
b		<del></del>			<41.>
C					<del>&lt;19.</del> >
d					<del>&lt;67.</del> >
e	<u> </u>	<del> </del>			
f		<del></del>	<del></del>		
g	-	<del> </del>		<del></del>	
h	<del> </del>	<del></del>	<del></del>	<del></del>	
1					
<u>.                                    </u>	<del> </del>				
k	<del>   </del>	<del></del>			
<u> </u>					
m			<u> </u>		
n		<del></del>			
0					
	1				
2 Capital gain net income or (net c	apıtal loss) {   If gaın, also enter   If (loss), enter   -0	In Part I, line 7	2		3,361.
	iss) as defined in sections 1222(5) an				
If gain, also enter in Part I, line 8	, column (c).	u (0).			
If (loss), enter "-0-" in Part I, line	8	J	3	N/A	

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

Department of the Treasury Internal Revenue Service

# **Schedule of Contributors**

➤ Attach to Form 990, Form 990-EZ, or Form 990-PF.

To do to www.irs.gov/Form990 for the latest information.

CHASE AND ASHLEY ANDERSON FOUNDATION

OMB No 1545-0047

2017

Name of the organization

Employer identification number

81-3597705

Organiza	ation type (check or	ne)
Filers of	:	Section:
Form 990	or 990-EZ	501(c)( ) (enter number) organization
		4947(a)(1) nonexempt charitable trust <b>not</b> treated as a private foundation
		527 political organization
Form 990	)-PF	X 501(c)(3) exempt private foundation
		4947(a)(1) nonexempt charitable trust treated as a private foundation
		501(c)(3) taxable private foundation
	ly a section 501(c)(	covered by the <b>General Rule</b> or a <b>Special Rule</b> .  7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions.
		filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions
Special F	Rules	
:	sections 509(a)(1) a any one contributoi	described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under nd 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from during the year, total contributions of the greater of (1) \$5,000, or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, line 1 Complete Parts I and II
:	year, total contribut	described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the ions of more than \$1,000 exclusively for religious, charitable, scientific, literary, or educational purposes, or for uelty to children or animals. Complete Parts I, II, and III
) 	year, contributions of s checked, enter he purpose Don't com	described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the exclusively for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box ere the total contributions that were received during the year for an exclusively religious, charitable, etc., plete any of the parts unless the <b>General Rule</b> applies to this organization because it received nonexclusively etc., contributions totaling \$5,000 or more during the year
but it mus	st answer "No" on F	t isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to e filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

LHA For Paperwork Reduction Act Notice, see the instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2017)

Name of organization

Employer identification number

### CHASE AND ASHLEY ANDERSON FOUNDATION

81-3597705

Part I	Contributors (see instructions). Use duplicate copies of Part I if add	itional space is needed.	
(a) No.	. (b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	CHARLES C. ANDERSON III  201 SOUTH COURT STREET STE 610  FLORNCE, AL 35630	\$125,000.	Person X Payroll (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II for noncash contri butions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of con <del>t</del> ribution
		\$	Person Payroll Noncash (Complete Part II for noncash contri butions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of con tribution
		<b>\$</b>	Person Payroll Noncash (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of con tribution
		s	Person Payroll Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		<b>\$</b>	Person Payroll Noncash (Complete Part II for noncash contributions)

Schedule B (Form 990, 990-EZ, or 990-PF) (2017) Name of organization Employer identification number CHASE AND ASHLEY ANDERSON FOUNDATION 81-3597705

Part II	Noncash Property (see instructions) Use duplicate copies of F	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 rec <i>e</i> ived	
_		     \$		
(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 rec <b>∉</b> ived	
_   _		\$		
(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date rec∕eived	
 		\$		
(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date rec eived	
(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received	
_   _				

Relationship of transferor to transferee

Transferee's name, address, and ZIP + 4

FORM 990-PF INTERE	ST ON SAVI	NGS AND TEM	PORARY	CASH IN	IVESTMENTS	STATEMENT 1
SOURCE		(A REVE PER B	NUE		(B) IVESTMENT ICOME	(C) ADJUSTED NET INCOME
BAIRD FIRST SOUTHERN			106. 52.		106. 52.	
TOTAL TO PART I, LI	NE 3		158.		158.	
FORM 990-PF	DIVIDEND	S AND INTER	EST FRO	M SECUR	RITIES	STATEMENT 2
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDEND	RE	(A) EVENUE BOOKS	(B) NET INVES MENT INCO	
BAIRD CAPITAL GAIN	2,498 1,339		0.	2,498. 1,339.		
TO PART I, LINE 4	3,837	•	0.	3,837.	3,83	7.
FORM 990-PF		ACCOUNTI	NG FEES			STATEMENT 3
DESCRIPTION		(A) EXPENSES PER BOOKS	(B NET IN MENT I	VEST-	(C) ADJUSTED NET INCOM	
ACCOUNTING FEES	_	3,680.		205.		3,475.
TO FORM 990-PF, PG	1, LN 16B	3,680.		205.		3,475.
FORM 990-PF		OTHER E	XPENSES			STATEMENT 4
DESCRIPTION		(A) EXPENSES PER BOOKS	NET IN	VEST-	(C) ADJUSTED NET INCOM	
BANK CHARGES POSTAGE BROKERAGE FEES	-	20. 48. 411.		1. 3. 23.		19. 45. 388.
TO FORM 990-PF, PG	l, LN 23	479.		27.		452
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FORM 990-PF CORPORATE STO	CK	STATEMENT	5
DESCRIPTION	BOOK VALUE	FAIR MARKET	ŗ
AMERICAN GLOBAL CAPITAL INCOME BUILDER LORD ABBETT INCOME FUND OF AMERICA NEW WORLD	22,788. 22,658. 23,225. 23,178. 4,241.	23,92 23,66 22,96 24,19	54. 56. 92.
TOTAL TO FORM 990-PF, PART II, LINE 10B	96,090.	99,66	50.