

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

Return of Private Foundation
or Section 4947(a)(1) Trust Treated as Private Foundation
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 ▶ Go to www.irs.gov/Form990PF for instructions and the latest information.

OMB No 1545-0052
2018
Open to Public Inspection

For calendar year 2018, or tax year beginning 01-01-2018, and ending 12-31-2018

Name of foundation BF & ROSE H PERKINS FOUNDATION		A Employer identification number 83-0138740
Number and street (or P O box number if mail is not delivered to street address) PO BOX 1064	Room/suite	B Telephone number (see instructions) (307) 674-8871
City or town, state or province, country, and ZIP or foreign postal code SHERIDAN, WY 82801		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ <u>7,662,634</u>	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ <i>(Part I, column (d) must be on cash basis)</i>	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</i>		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)	40,716			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	163,810	163,810		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	319,588			
	b Gross sales price for all assets on line 6a	2,797,103			
	7 Capital gain net income (from Part IV, line 2)		319,588		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule)	4,004	4,004			
12 Total. Add lines 1 through 11	528,118	487,402			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	12,000	1,500		10,500
	14 Other employee salaries and wages	46,591			46,591
	15 Pension plans, employee benefits	3,383			3,383
	16a Legal fees (attach schedule)	5,700	663		5,037
	b Accounting fees (attach schedule)	4,410	882		3,528
	c Other professional fees (attach schedule)	95,311	35,450		59,861
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	9,249	502		
	19 Depreciation (attach schedule) and depletion	1,418	1,418		
	20 Occupancy	8,175	1,635		6,540
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	36,115	8,020		28,095
	24 Total operating and administrative expenses. Add lines 13 through 23	222,352	50,070		163,535
	25 Contributions, gifts, grants paid	149,513			149,513
26 Total expenses and disbursements. Add lines 24 and 25	371,865	50,070		313,048	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	156,253				
b Net investment income (if negative, enter -0-)		437,332			
c Adjusted net income (if negative, enter -0-)					

Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing	6,050	23,169	23,169
	2 Savings and temporary cash investments	382,632	295,494	295,494
	3 Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4 Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ _____ 1,287,686 Less allowance for doubtful accounts ▶ _____	1,464,061	1,287,686	1,287,686
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	6,075		
	10a Investments—U S and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)	4,209,144	5,015,252	5,015,252
	c Investments—corporate bonds (attach schedule)	2,286,991	1,024,638	1,024,638
	11 Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	1,733	1,395	1,395
	14 Land, buildings, and equipment basis ▶ _____ 57,151 Less accumulated depreciation (attach schedule) ▶ _____ 50,234	8,336	6,917	10,000
15 Other assets (describe ▶ _____)	2	1	5,000	
16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	8,365,024	7,654,552	7,662,634	
Liabilities	17 Accounts payable and accrued expenses	7,590	2,288	
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶ _____)			
	23 Total liabilities (add lines 17 through 22)	7,590	2,288	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here <input type="checkbox"/> 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 <input checked="" type="checkbox"/> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	619,299	619,299	
	28 Paid-in or capital surplus, or land, bldg , and equipment fund			
29 Retained earnings, accumulated income, endowment, or other funds	7,738,135	7,032,965		
30 Total net assets or fund balances (see instructions)	8,357,434	7,652,264		
31 Total liabilities and net assets/fund balances (see instructions) .	8,365,024	7,654,552		

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	8,357,434
2 Enter amount from Part I, line 27a	2	156,253
3 Other increases not included in line 2 (itemize) ▶ _____	3	
4 Add lines 1, 2, and 3	4	8,513,687
5 Decreases not included in line 2 (itemize) ▶ _____	5	861,423
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	7,652,264

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs. MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a See Additional Data Table			
b			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a See Additional Data Table			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(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	
a See Additional Data Table			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	2	319,588
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8	3	-4,250

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? Yes No
 If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2017	451,023	6,426,226	0.070185
2016	437,897	5,797,356	0.075534
2015	2,159,904	7,095,001	0.304426
2014	657,535	7,766,121	0.084667
2013	554,119	7,176,217	0.077216

2 Total of line 1, column (d)	2	0.612028
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years	3	0.122406
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	6,793,946
5 Multiply line 4 by line 3	5	831,620
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	4,373
7 Add lines 5 and 6	7	835,993
8 Enter qualifying distributions from Part XII, line 4	8	448,337

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

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

Table with 11 rows for excise tax calculation. Includes fields for exempt foundations, domestic foundations, tax under section 511, subtitle A tax, and credits/payments. Total tax due is 827.

Part VII-A Statements Regarding Activities

Table with 10 rows for activity statements. Includes questions about political campaigns, political expenditures, unrelated business income, and substantial contributors. Includes Yes/No columns.

Part VII-A Statements Regarding Activities (continued)

Table with 3 columns: Question, Yes, No. Rows 11-14 regarding controlled entities, distributions, public inspection requirements, and books in care.

Located at 45 EAST LOUCKS ST SHERIDAN WY ZIP+4 82801

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.

Table with 3 columns: Question, Yes, No. Row 16 regarding interest in foreign countries.

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.

Main table with 3 columns: Question, Yes, No. Rows 1a-4b regarding Form 4720 exceptions and requirements.

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

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

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

1 List all officers, directors, trustees, foundation managers and their compensation. See instructions

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Additional Data Table				

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

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

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

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(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 HEALTHY HABITS, HEALTHY KIDS PROGRAM	59,861
2 MEDICAL EXPENSE ASSISTANCE TO 26 CHILDREN	48,013
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 EDUCATIONAL LOANS TO 37 STUDENTS	135,289
2	
All other program-related investments See instructions	
3	

Total. Add lines 1 through 3 **▶** 135,289

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities.	1a	6,457,597
b	Average of monthly cash balances.	1b	360,964
c	Fair market value of all other assets (see instructions).	1c	78,846
d	Total (add lines 1a, b, and c).	1d	6,897,407
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets.	2	
3	Subtract line 2 from line 1d.	3	6,897,407
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	103,461
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	6,793,946
6	Minimum investment return. Enter 5% of line 5.	6	339,697

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here and do not complete this part.)

1	Minimum investment return from Part X, line 6.	1	339,697
2a	Tax on investment income for 2018 from Part VI, line 5.	2a	8,747
b	Income tax for 2018 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	8,747
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	330,950
4	Recoveries of amounts treated as qualifying distributions.	4	311,665
5	Add lines 3 and 4.	5	642,615
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	642,615

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	313,048
b	Program-related investments—total from Part IX-B.	1b	135,289
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	448,337
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions.	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	448,337

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 2017	(c) 2017	(d) 2018
1 Distributable amount for 2018 from Part XI, line 7				642,615
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only.				
b Total for prior years 20___, 20___, 20___				
3 Excess distributions carryover, if any, to 2018				
a From 2013.				
b From 2014.				
c From 2015.			250,171	
d From 2016.				
e From 2017.				
f Total of lines 3a through e.	250,171			
4 Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ 448,337				
a Applied to 2017, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2018 distributable amount.				448,337
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a))	194,278			194,278
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	55,893			
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b Taxable amount—see instructions				
e Undistributed income for 2017 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2018 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2019				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).				
8 Excess distributions carryover from 2013 not applied on line 5 or line 7 (see instructions).				
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	55,893			
10 Analysis of line 9				
a Excess from 2014.				
b Excess from 2015.			55,893	
c Excess from 2016.				
d Excess from 2017.				
e Excess from 2018.				

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2018, enter the date of the ruling. ▶

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

	Tax year				(e) Total
	(a) 2018	(b) 2017	(c) 2016	(d) 2015	
2a Enter the lesser of the adjusted net income from Part I or the minimum 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 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 Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see instructions.)

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

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

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

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

a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed
 BF ROSE H PERKINS FOUNDATION
 PO BOX 1064
 SHERIDAN, WY 82801
 (307) 674-8871

b The form in which applications should be submitted and information and materials they should include
 CONTACT FOUNDATION OFFICE FOR APPLICATION

c Any submission deadlines
 NONE

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors
 GENERALLY APPLICANTS MUST BE RESIDENTS OF SHERIDAN COUNTY, WYOMING, UNDER AGE 21, AND SHOW FINANCIAL NEED. ADDITIONAL RESTRICTION INFORMATION IS AVAILABLE FROM THE FOUNDATION OFFICE

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> See Additional Data Table				
Total ▶ 3a				
b <i>Approved for future payment</i>				
Total ▶ 3b				

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

Part XVII

Table with 3 columns: Question (1, a, b, c), Yes, No. Contains questions about transfers to noncharitable exempt organizations.

d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation.

Table with 4 columns: (a) Line No, (b) Amount involved, (c) Name of noncharitable exempt organization, (d) Description of transfers, transactions, and sharing arrangements.

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527? Yes No

Table with 3 columns: (a) Name of organization, (b) Type of organization, (c) Description of relationship.

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete.

Sign Here: Signature of officer or trustee, Date (2019-05-15), Title. Includes a box: May the IRS discuss this return with the preparer shown below (see instr)? Yes No

Paid Preparer Use Only section containing fields for Preparer's name, Signature, Date, Check if self-employed, PTIN, Firm's name, address, and EIN.

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

List and describe the kind(s) of property sold (e.g., real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)
1 CALIFORNIA MINERAL RIGHTS	P	1992-04-01	2018-09-05
1 1908 397-VANGUARD SHORT-TERM FEDERAL	P	2017-03-22	2018-05-23
99-QUALCOMM INC	P	2016-03-11	2018-08-13
735 236-HARBOR INTERNATIONAL FUND	P	2014-09-24	2018-01-05
81-UNION PACIFIC CORP	P	2013-11-20	2018-06-08
100-ROCHE HOLDINGS AG SPN ADR EACH R	P	2012-12-20	2018-04-03
4630 29-VANGUARD HIGH-YIELD CORPORAT	P	2012-02-13	2018-02-27
264-CONSUMER STAPLES SELECT SECTOR S	P	2018-05-11	2018-11-01
3516 98-EATON VANCE FLOATING-RATE AD	P	2017-06-27	2018-11-05
549 468-HARBOR INTERNATIONAL FUND	P	2016-01-19	2018-01-05

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
120,000		1	119,999
20,019		20,420	-401
6,401		4,996	1,405
51,239		51,790	-551
11,570		6,437	5,133
2,804		2,538	266
26,948		27,087	-139
14,594		13,084	1,510
38,476		38,195	281
38,292		29,957	8,335

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(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	
			119,999
			-401
			1,405
			-551
			5,133
			266
			-139
			1,510
			281
			8,335

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

List and describe the kind(s) of property sold (e.g., real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)
3756 098-EATON VANCE FLOATING-RATE A	P	2014-08-22	2018-11-05
1 4558 854-VANGUARD SHORT-TERM INVESTM	P	2013-09-09	2018-01-16
20-COSTCO WHOLESALE CORP	P	2012-12-20	2018-05-11
2093 254-VANGUARD HIGH-YIELD CORPORA	P	2012-02-13	2018-05-17
222 51-FIDELITY INTERNATIONAL INDEX	P	2018-02-27	2018-11-02
950 57-DFA GLOBAL REAL ESTATE SECURI	P	2017-04-13	2018-05-23
229-FORD MOTOR CO	P	2016-01-19	2018-03-16
180-CELGENE CORP	P	2014-04-15	2018-08-13
140 394-VANGUARD SHORT-TERM INVESTME	P	2013-09-09	2018-02-06
70-CELGENE CORP	P	2012-12-20	2018-08-13

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
41,092		41,580	-488
48,324		48,324	
3,908		1,980	1,928
11,994		12,246	-252
9,708		9,708	
10,086		10,266	-180
2,551		2,798	-247
16,439		12,475	3,964
1,484		1,494	-10
6,393		2,804	3,589

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(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	
			-488
			1,928
			-252
			-180
			-247
			3,964
			-10
			3,589

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)
69-JPMORGAN CHASE & CO	P	2012-02-08	2018-02-27
1 1991 591-FIDELITY INTERNATIONAL INDE	P	2018-01-16	2018-11-02
1680 672-VANGUARD SHORT-TERM INVESTM	P	2017-08-25	2018-11-06
67-APACHE CORP	P	2016-01-19	2018-04-03
5022 422-EATON VANCE FLOATING-RATE A	P	2014-04-09	2018-11-05
2203 22-EATON VANCE FLOATING-RATE AD	P	2013-09-09	2018-02-27
49-QUALCOMM INC	P	2012-12-20	2018-08-13
5-JPMORGAN CHASE & CO	P	2012-02-08	2018-03-16
4574 681-FIDELITY INTERNATIONAL INDE	P	2018-01-08	2018-11-02
3210 273-DFA COMMODITY STRATEGY PORT	P	2017-02-22	2018-05-23

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
8,196		2,644	5,552
90,000		90,000	
17,479		18,000	-521
2,532		2,383	149
54,945		56,000	-1,055
24,125		24,566	-441
3,168		3,000	168
581		192	389
203,024		203,024	
20,064		19,390	674

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(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	
			5,552
			-521
			149
			-1,055
			-441
			168
			389
			674

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

List and describe the kind(s) of property sold (e.g., real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
220-CITIGROUP INC	P	2016-01-19	2018-11-01
1 20-APPLE INC	P	2014-03-28	2018-02-27
36-SKYWORKS SOLUTIONS INC	P	2013-08-23	2018-02-27
105-CITIGROUP INC	P	2012-12-20	2018-11-01
156-CISCO SYSTEMS INC	P	2011-01-06	2018-05-11
523 923-VANGUARD SHORT-TERM INVESTME	P	2017-12-28	2018-11-06
183-WELLS FARGO & CO	P	2016-10-27	2018-02-27
189-APACHE CORP	P	2015-09-14	2018-04-03
73-APPLE INC	P	2014-03-28	2018-11-01
4558 854-VANGUARD SHORT-TERM INVESTM	P	2013-08-21	2018-02-06

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
14,537		9,475	5,062
3,584		1,533	2,051
4,022		905	3,117
6,927		4,199	2,728
7,186		3,265	3,921
5,449		5,570	-121
10,984		8,566	2,418
7,143		7,575	-432
15,996		5,595	10,401
48,187		48,643	-456

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(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	
			5,062
			2,051
			3,117
			2,728
			3,921
			-121
			2,418
			-432
			10,401
			-456

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

List and describe the kind(s) of property sold (e.g., real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
59-ROCHE HOLDINGS AG SPN ADR EACH RE	P	2012-12-12	2018-04-03
1 5122 951-VANGUARD INTERMEDIATE-TERM	P	2010-03-30	2018-01-16
1674 249-DFA INFLATION PROTECTED SEC	P	2017-11-17	2018-02-27
292-WELLS FARGO & CO	P	2016-10-27	2018-03-27
293-EXELON CORP	P	2015-03-31	2018-11-30
36-APPLE INC	P	2014-03-28	2018-11-02
43-MICROSOFT CORP	P	2013-08-15	2018-02-27
78-CELGENE CORP	P	2012-12-11	2018-08-13
5322 778-VANGUARD INTERMEDIATE-TERM	P	2010-02-10	2018-01-16
2512 939-VANGUARD SHORT-TERM INVESTM	P	2017-03-22	2018-02-06

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
1,655		1,496	159
49,641		50,000	-359
19,237		19,823	-586
15,293		13,668	1,625
13,446		9,791	3,655
7,451		2,759	4,692
4,090		1,366	2,724
7,124		3,229	3,895
51,578		51,844	-266
26,562		26,788	-226

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(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	
			159
			-359
			-586
			1,625
			3,655
			4,692
			2,724
			3,895
			-266
			-226

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)
293-WELLS FARGO & CO	P	2016-10-27	2018-03-27
1 100000-FLUOR CORP 3 375% 15 SEP 2021	P	2015-02-24	2018-09-24
50000-CITIGROUP INC 2 5% 26 SEP 2018	P	2014-02-18	2018-09-26
6688 963-VANGUARD HIGH-YIELD CORPORA	P	2013-07-16	2018-05-17
8-UNITEDHEALTH GROUP INC	P	2012-09-27	2018-02-27
235-QUALCOMM INC	P	2007-11-01	2018-08-13
5203 002-VANGUARD SHORT-TERM FEDERAL	P	2017-03-22	2018-02-06
97-LOWE'S COS INC	P	2016-10-19	2018-02-27
50000-BNP PARIBAS / BNP PARIBAS US M	P	2015-02-24	2018-12-12
1156 978-HARBOR INTERNATIONAL FUND	P	2014-02-11	2018-01-05

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
15,328		13,715	1,613
100,657		103,986	-3,329
50,000		50,330	-330
38,328		40,000	-1,672
1,884		451	1,433
15,195		9,466	5,729
54,944		55,672	-728
9,409		6,741	2,668
50,000		50,705	-705
80,630		81,000	-370

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(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	
			1,613
			-3,329
			-330
			-1,672
			1,433
			5,729
			-728
			2,668
			-705
			-370

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
471 568-HARBOR INTERNATIONAL FUND	P	2013-04-15	2018-01-05
1 107-UNITEDHEALTH GROUP INC	P	2012-09-27	2018-08-13
71-QUALCOMM INC	P	2005-04-21	2018-02-27
2851 711-VANGUARD SHORT-TERM INVESTM	P	2017-03-22	2018-02-26
65-NIKE INC	P	2016-10-12	2018-02-27
114 307-VANGUARD EMERGING MARKETS ST	P	2015-02-13	2018-02-27
216 404-DFA EMERGING MARKETS SMALL C	P	2014-02-11	2018-02-27
4866 217-VANGUARD SHORT-TERM INVESTM	P	2013-04-15	2018-01-16
7-MCKESSON CORP	P	2012-09-13	2018-02-27
79-QUALCOMM INC	P	2005-04-21	2018-08-13

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
32,864		29,699	3,165
27,863		6,030	21,833
4,724		2,328	2,396
30,029		30,399	-370
4,443		3,420	1,023
4,565		3,954	611
5,313		4,255	1,058
51,582		51,582	
1,068		616	452
5,108		2,590	2,518

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(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	
			3,165
			21,833
			2,396
			-370
			1,023
			611
			1,058
			452
			2,518

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

List and describe the kind(s) of property sold (e.g., real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)
1899 335-VANGUARD SHORT-TERM FEDERAL	P	2017-03-22	2018-02-26
1 91-STARBUCKS CORP	P	2016-04-18	2018-02-27
6164 14-VANGUARD HIGH-YIELD CORPORAT	P	2015-02-13	2018-05-17
1274 596-EATON VANCE FLOATING-RATE A	P	2014-02-11	2018-02-27
1758 968-TEMPLETON GLOBAL BOND FUND/	P	2013-04-15	2018-02-27
67-CITIGROUP INC	P	2012-08-03	2018-02-27
42-CISCO SYSTEMS INC	P	2005-03-02	2018-02-27
17056 43-VANGUARD SHORT-TERM INVESTM	P	2017-03-22	2018-02-27
143-CELGENE CORP	P	2016-04-18	2018-08-13
2006 981-VANGUARD HIGH-YIELD CORPORA	P	2015-02-13	2018-05-23

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
20,019		20,323	-304
5,173		5,554	-381
35,321		37,170	-1,849
13,957		14,288	-331
20,949		23,256	-2,307
5,175		1,845	3,330
1,886		755	1,131
179,434		181,822	-2,388
13,060		15,403	-2,343
11,480		12,102	-622

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(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	
			-304
			-381
			-1,849
			-331
			-2,307
			3,330
			1,131
			-2,388
			-2,343
			-622

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)
2475 246-VANGUARD HIGH-YIELD CORPORA	P	2014-02-11	2018-05-17
1 373 346-OPPENHEIMER DEVELOPING MARKE	P	2013-04-15	2018-02-27
514-FORD MOTOR CO	P	2012-08-03	2018-03-16
98-CISCO SYSTEMS INC	P	2005-03-02	2018-05-11
9433 962-VANGUARD SHORT-TERM FEDERAL	P	2017-03-14	2018-01-16
40 966-VANGUARD MID-CAP INDEX FUND	P	2016-03-24	2018-02-27
1501-FORD MOTOR CO	P	2014-10-20	2018-03-16
1004 566-EATON VANCE FLOATING-RATE A	P	2014-02-11	2018-05-23
4866 217-VANGUARD SHORT-TERM INVESTM	P	2013-03-27	2018-02-06
239-CITIGROUP INC	P	2012-08-03	2018-11-01

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
14,183		15,000	-817
16,733		12,743	3,990
5,725		4,677	1,048
4,514		1,762	2,752
99,906		100,566	-660
7,929		6,029	1,900
16,719		21,229	-4,510
11,000		11,261	-261
51,436		52,798	-1,362
15,768		6,582	9,186

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(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	
			-817
			3,990
			1,048
			2,752
			-660
			1,900
			-4,510
			-261
			-1,362
			9,186

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)
114-COSTCO WHOLESALE CORP	P	2003-09-11	2018-05-11
1 3766 902-VANGUARD SHORT-TERM FEDERAL	P	2017-03-14	2018-02-06
482 88-VANGUARD MID-CAP INDEX FUND	P	2016-03-24	2018-12-21
184-CITIGROUP INC	P	2014-10-20	2018-11-01
3519 232-EATON VANCE FLOATING-RATE A	P	2014-02-11	2018-11-05
886-ROCHE HOLDINGS AG SPN ADR EACH R	P	2013-01-29	2018-04-03
138-JPMORGAN CHASE & CO	P	2012-05-25	2018-03-16
16-PEPSICO INC	P	2001-07-16	2018-02-27
2357 555-VANGUARD SHORT-TERM INVESTM	P	2017-03-22	2018-11-06
706 105-VANGUARD MID-CAP INDEX FUND	P	2016-03-24	2018-12-21

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
22,275		3,641	18,634
39,778		40,155	-377
79,772		71,070	8,702
12,139		9,301	2,838
38,500		39,451	-951
24,848		24,384	464
16,047		4,641	11,406
1,784		745	1,039
26,391		27,050	-659
116,649		103,924	12,725

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(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	
			18,634
			-377
			8,702
			2,838
			-951
			464
			11,406
			1,039
			-659
			12,725

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

List and describe the kind(s) of property sold (e.g., real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
179-CITIGROUP INC	P	2014-10-20	2018-11-01
1 11-UNION PACIFIC CORP	P	2013-11-20	2018-02-27
346-FORD MOTOR CO	P	2012-12-20	2018-03-16
1054 544-TEMPLETON GLOBAL BOND FUND/	P	2012-02-13	2018-02-27
LITIGATION PROCEEDS	P	2017-07-04	2018-07-05

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
11,828		9,048	2,780
1,503		874	629
3,854		4,053	-199
12,560		13,605	-1,045
56			56

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(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	
			2,780
			629
			-199
			-1,045
			56

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
STEVE CARROLL PO BOX 1064 SHERIDAN, WY 82801	SEC/TREAS 5 00	2,400	0	0
GEORGE FLETCHER PO BOX 1064 SHERIDAN, WY 82801	TRUSTEE 5 00	2,400	0	0
MELISSA K WATT DDS PO BOX 1064 SHERIDAN, WY 82801	TRUSTEE 5 00	2,400	0	0
DAVID GARBER PO BOX 1064 SHERIDAN, WY 82801	VICE CHAIRMA 5 00	2,400	0	0
PADDY BARD PO BOX 1064 SHERIDAN, WY 82801	CHAIRMAN 5 00	2,400	0	0

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i>				
26 CHILDREN WITH FINANCIAL NEED SHERIDAN COUNTY, WY 82801	NONE	INDIVIDUAL	MEDICAL & DENTAL EXPENSES	48,013
SHERIDAN COLLEGE FOUNDATION PO BOX 6328 SHERIDAN, WY 82801	NONE	EXEMPT ORG	BUILDING FUND & SCHOLARSHIPS	39,000
SHERIDAN SCHOOL DISTRICT 2 201 N CONNOR ST 100 SHERIDAN, WY 82801	NONE	EXEMPT ORG	SUPPORT OPERATIONS	2,500
Total				149,513

▶ 3a

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
VOLUNTEERS OF AMERICA 1876 S SHERIDAN AVE SHERIDAN, WY 82807	NONE	EXEMPT ORG	SUPPORT OPERATIONS	5,000
PEOPLE ASSISTANCE MANAGEMENT INC PO BOX 312 SHERIDAN, WY 82801	NONE	EXEMPT ORG	HOLIDAY MEALS	5,000
SHERIDAN COUNTY LIBRARY FOUNDATION 335 W ALGER ST SHERIDAN, WY 82801	NONE	EXEMPT ORG	SUPPORT OPERATIONS	2,500
Total ▶ 3a				149,513

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
TONGUE RIVER CHILD'S PLACE 84 DAYTON ST RANCHESTER, WY 82839	NONE	EXEMPT ORG	SUPPORT OPERATIONS	1,500
SHERIDAN COUNTY YMCA 417 N JEFFERSON ST SHERIDAN, WY 82801	NONE	EXEMPT ORG	GIVE YOUR HEART TO A CHILD CAMPAIGN	2,500
SHERIDAN HEALTH CENTERPO BOX 682 SHERIDAN, WY 82801	NONE	EXEMPT ORG	COMMUNITY GRANT FOR YOUNG ADULTS	11,250
Total				149,513

▶ 3a

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SHERIDAN RECREATION DISTRICT PO BOX 6308 SHERIDAN, WY 82801	NONE	EXEMPT ORG	SPONSORSHIP	1,000
SHERIDAN SCHOOL DISTRICT 1 PO BOX 395 RANCHESTER, WY 82839	NONE	EXEMPT ORG	TR DESTINATION IMAGINATION	3,000
THE FOOD GROUP1 S TSCHIRGI SHERIDAN, WY 82801	NONE	EXEMPT ORG	SUPPORT OPERATIONS	2,500
Total				149,513

▶ 3a

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BIG HORN EDUCATION FUND PO BOX 615 BIG HORN, WY 82833	NONE	EXEMPT ORG	SCHOLARSHIP SUPPORT	2,000
HABITAT FOR HUMANITY PO BOX 6196 SHERIDAN, WY 82801	NONE	EXEMPT ORG	SUPPORT OPERATIONS	5,000
JOEY'S FLY FISHING FOUNDATION 109 S MAIN STE B SHERIDAN, WY 82801	NONE	EXEMPT ORG	SUPPORT OPERATIONS	2,750
Total				149,513

▶ **3a**

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
RAISING READERS IN WYOMING 475 S SPRUCE ST CASPER, WY 82601	NONE	EXEMPT ORG	SHERIDAN COUNTY YOUTH	5,000
SHERIDAN ARTISTS GUILD 21 W BRUNDAGE ST SHERIDAN, WY 82801	NONE	EXEMPT ORG	SUPPORT OPERATIONS	2,500
SHERIDAN KIDS LIFE444 W ALGER SHERIDAN, WY 82801	NONE	EXEMPT ORG	SUPPORT OPERATIONS	5,000
Total ▶ 3a				149,513

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SHERIDAN COUNTY MEMORIAL HOSPITAL PO BOX 391 SHERIDAN, WY 82801	NONE	EXEMPT ORG	SUPPORT OPERATIONS	1,000
SHERIDAN ON SKATES 475 E BRUNDAGE SHERIDAN, WY 82801	NONE	EXEMPT ORG	SUPPORT OPERATIONS	2,500
Total ▶ 3a				149,513

TY 2018 Accounting Fees Schedule**Name:** BF & ROSE H PERKINS FOUNDATION**EIN:** 83-0138740

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INDIRECT ACCOUNTING FEES	4,410	882		3,528

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

TY 2018 Depreciation Schedule

Name: BF & ROSE H PERKINS FOUNDATION

EIN: 83-0138740

Depreciation Schedule

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
FULLY DEPRECIATED - SEE LIST	1998-01-01	24,832	24,832	200DB	7 0000				
CHECK PRINTER	1999-07-26	567	567	200DB	7 0000				
OFFICE CHAIR	2001-11-21	575	575	200DB	7 0000				
VACUUM CLEANER	2004-12-28	292	292	200DB	7 0000				
COPY MACHINE	2006-07-31	1,864	1,864	200DB	7 0000				
SCANNER	2006-10-18	400	400	200DB	7 0000				
WIRING	1992-10-31	336	269	S/L	31 5000	10	10		
CARPET	1992-10-31	3,522	2,819	S/L	31 5000	112	112		
DRAPES	1992-10-31	2,694	2,156	S/L	31 5000	85	85		
PAINTING & DRAPES	1992-11-30	2,664	2,125	S/L	31 5000	84	84		
ARTWORK - SEE LIST	1994-09-30	3,772							
DELL OPTIPLEX DESKTOP	2008-01-28	1,645	1,645	200DB	5 0000				
SCANNER	2009-04-08	767	767	200DB	5 0000				
PRINTER/COPIER/FAX	2012-10-08	2,861	2,861	200DB	5 0000				
COMPUTER - BUS TECH, INC	2013-08-19	1,162	1,095	200DB	5 0000	67	67		
CLOUD BASED SERVER	2015-04-06	9,200	6,550	200DB	5 0000	1,060	1,060		

TY 2018 Investments Corporate Bonds Schedule

Name: BF & ROSE H PERKINS FOUNDATION

EIN: 83-0138740

Investments Corporate Bonds Schedule

Name of Bond	End of Year Book Value	End of Year Fair Market Value
FIRST INTERSTATE TRUST AGENCY ACCT		
DFA INFLATION PROTECTED SECURITIES	111,321	111,321
VANGUARD SHORT-TERM FEDERAL FUND	133,493	133,493
ALLERGAN INC 3.375%	100,903	100,903
BNP PARIBAS		
CITIGROUP INC		
FLUOR CORP 3.375%		
HSBC USA INC	49,840	49,840
JPMORGAN CHASE & CO 3.25%	100,091	100,091
MORGAN STANLEY	50,525	50,525
WELLS FARGO & CO. 3.45%	99,224	99,224
VANGUARD INTERMEDIATE TERM	81,907	81,907
VANGUARD SHORT-TERM INVESTM		
EATON VANCE FL RATE ADV	49,783	49,783
VANGUARD HIGH YIELD CORPORA	49,815	49,815
TEMPLETON GLOBAL BOND FUND	197,736	197,736

TY 2018 Investments Corporate Stock Schedule**Name:** BF & ROSE H PERKINS FOUNDATION**EIN:** 83-0138740**Investments Corporation Stock Schedule**

Name of Stock	End of Year Book Value	End of Year Fair Market Value
FIRST INTERSTATE TRUST AGENCY ACCT		
ALPHABET INC CAP STK CL A	31,349	31,349
AMERICAN EXPRESS COMPANY	41,941	41,941
APACHE CORPORATION		
APPLE COMPUTER INC	40,855	40,855
BERKSHIRE HATHAWAY INC CL B	30,014	30,014
BRISTOL MYERS SQUIBB COMPANY	25,782	25,782
CELGENE CORP		
CHEVRON CORP	20,017	20,017
CISCO SYSTEMS INC	33,147	33,147
CITIGROUP INC		
COMMUNICATION SERVICES SELECT SECTOR	36,037	36,037
CONSUMER DISCRETIONARY SELECT SECTOR	27,030	27,030
CONSUMER STAPLES SELECT SECTOR	13,406	13,406
COSTCO WHOLESALE CORPORATION		
DOWDUPONT INC	21,232	21,232
EMERSON ELECTRIC COMPANY	27,007	27,007
ENERGY SELECT SECTOR SPDR FUND	6,309	6,309
EXELON CORPORATION	19,844	19,844
EXXON MOBIL CORPORATION	32,117	32,117
FACEBOOK INC	27,005	27,005
FEDEX CORP	20,086	20,086
FINANCIAL SELECT SECTOR SPDR FUND	37,064	37,064
FORD MOTOR COMPANY		
GENERAL ELECTRIC COMPANY		
GILEAD SCIENCES INC.	35,091	35,091
GOLDMAN SACHS GROUP INC	25,726	25,726
HEALTH CARE SELECT SECTOR SPDR FUND	72,841	72,841
INDUSTRIAL SELECT SECTOR SPDR FUND	32,334	32,334
JP MORGAN CHASE & COMPANY	55,839	55,839

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
LOWE'S COS INC	39,807	39,807
MATERIALS SELECT SECTOR SPDR FUND	9,599	9,599
MCKESSON CORPORATION	30,597	30,597
MICROSHIP TECHNOLOGY INC	17,477	17,477
MICROSOFT CORPORATION	39,003	39,003
MONDELEZ INTERNATIONAL INC	25,745	25,745
NIKE INC	33,983	33,983
PEPSICO INC	31,306	31,306
QUALCOMM INC	20,658	20,658
SCHLUMBERGER LIMITED	20,412	20,412
SKYWORKS SOLUTIONS INC	21,983	21,983
STARBUCKS CORP	35,420	35,420
TECHNOLOGY SELECT SECTOR SPDR FUND	50,390	50,390
UNION PACIFIC CORPORATION	30,272	30,272
UNITEDHEALTH GROUP INC	26,905	26,905
VANGUARD 500 INDEX FUND	1,052,177	1,052,177
WAL-MART STORES INC	27,914	27,914
WALT DISNEY CO	62,118	62,118
WELLS FARGO & CO		
DFA US SMALL CAP EQUITIES	498,403	498,403
VANGUARD MID-CAP INDEX FUND		
AMERICAN EUROPACIFIC GROWTH	257,564	257,564
FIDELITY INTERNATIONAL INDEX FUND	257,938	257,938
GS-INTERNATIONAL SML CAP INSIGHT FUN	141,612	141,612
HARBOR INTERNATIONAL FUND		
DFA EMERGING MARKETS SML CAP	269,991	269,991
OPPENHEIMER DEVELOPING MARKETS	337,829	337,829
VANGUARD EMERGING MARKETS STOCK INDE	349,066	349,066
ROCHE HOLDINGS LTD SPONS		
DFA COMMODITY STRATEGY PORTFOLIO	305,014	305,014

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
DFA GLOBAL REAL STATE SECURITIES	309,996	309,996

TY 2018 Investments - Other Schedule**Name:** BF & ROSE H PERKINS FOUNDATION**EIN:** 83-0138740**Investments Other Schedule 2**

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
ACCRUED DIVIDENDS RECEIVABLE	FMV	1,395	1,395

**TY 2018 Land, Etc.
Schedule****Name:** BF & ROSE H PERKINS FOUNDATION**EIN:** 83-0138740

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
OFFICE EQUIPMENT AND FIXTURES	57,151	50,234	6,917	10,000

TY 2018 Legal Fees Schedule**Name:** BF & ROSE H PERKINS FOUNDATION**EIN:** 83-0138740

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INDIRECT LEGAL FEES	5,700	663		5,037

TY 2018 Other Assets Schedule**Name:** BF & ROSE H PERKINS FOUNDATION**EIN:** 83-0138740**Other Assets Schedule**

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
MINERAL INTERESTS	2	1	5,000

TY 2018 Other Decreases Schedule**Name:** BF & ROSE H PERKINS FOUNDATION**EIN:** 83-0138740

Description	Amount
UNREALIZED LOSS ON INVESTMENTS	861,423

TY 2018 Other Expenses Schedule**Name:** BF & ROSE H PERKINS FOUNDATION**EIN:** 83-0138740**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXPENSES				
BANK CHARGES	136	68		68
CONTINUING EDUCATION	350			350
DUES & SUBSCRIPTIONS	129	26		103
INSURANCE	3,012	1,506		1,506
OFFICE SUPPLIES	29,581	5,916		23,665
POSTAGE & DELIVERY	829	166		663
TELEPHONE	1,689	338		1,351
WORKERS COMPENSATION	389			389

TY 2018 Other Income Schedule**Name:** BF & ROSE H PERKINS FOUNDATION**EIN:** 83-0138740**Other Income Schedule**

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
MINERAL LEASE INCOME	4,305	4,305	
CA WITHHOLDING	-301	-301	

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

TY 2018 Other Notes/Loans Receivable Long Schedule

Name: BF & ROSE H PERKINS FOUNDATION

EIN: 83-0138740

Borrower's Name	Relationship to Insider	Original Amount of Loan	Balance Due	Date of Note	Maturity Date	Repayment Terms	Interest Rate	Security Provided by Borrower	Purpose of Loan	Description of Lender Consideration	Consideration FMV
STUDENT LOANS	NONE		1,287,686				0 %		EDUCATIONAL PURPOSES		

TY 2018 Other Professional Fees Schedule**Name:** BF & ROSE H PERKINS FOUNDATION**EIN:** 83-0138740

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT	35,450	35,450		
HEALTHY HABITS HEALTHY KIDS PROG	59,861			59,861

TY 2018 Taxes Schedule**Name:** BF & ROSE H PERKINS FOUNDATION**EIN:** 83-0138740

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAXES	8,747			
CALIFORNIA FILING FEES	85	85		
FOREIGN TAXES	417	417		

Schedule B
(Form 990, 990-EZ,
or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors
▶ Attach to Form 990, 990-EZ, or 990-PF
▶ Go to www.irs.gov/Form990 for the latest information

OMB No 1545-0047
2018

Name of the organization
BF & ROSE H PERKINS FOUNDATION

Employer identification number
83-0138740

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

- 501(c)() (enter number) organization
- 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
- 527 political organization

Form 990-PF

- 501(c)(3) exempt private foundation
- 4947(a)(1) nonexempt charitable trust treated as a private foundation
- 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions

General Rule

- For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other property) from any one contributor Complete Parts I and II See instructions for determining a contributor's total contributions

Special Rules

- For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹ 3% support test of the regulations under sections 509(a)(1) and 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 any one contributor, 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, or (ii) Form 990-EZ, line 1 Complete Parts I and II
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals Complete Parts I, II, and III
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc , purposes, but no such contributions totaled more than \$1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc , contributions totaling \$5,000 or more during the year ▶ \$ _____

Caution. An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Name of organization BF & ROSE H PERKINS FOUNDATION	Employer identification number 83-0138740
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Part I **Contributors** (See instructions) Use duplicate copies of Part I if additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	CHANDLER H KIBBEE AND MERCEDES K PO BOX 2007	\$ 15,000	Person <input checked="" type="checkbox"/>
	SHERIDAN, WY 82801		Payroll <input type="checkbox"/>
			Noncash <input type="checkbox"/>
			(Complete Part II for noncash contributions)
2	WYOMING COMMUNITY FOUNDATION 1472 N 5TH ST STE 201	\$ 15,000	Person <input checked="" type="checkbox"/>
	LARAMIE, WY 82072		Payroll <input type="checkbox"/>
			Noncash <input type="checkbox"/>
			(Complete Part II for noncash contributions)
3	WK LOVE FOUNDATION 303 S MAIN ST	\$ 5,000	Person <input checked="" type="checkbox"/>
	SHERIDAN, WY 82801		Payroll <input type="checkbox"/>
			Noncash <input type="checkbox"/>
			(Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/>
			Payroll <input type="checkbox"/>
			Noncash <input type="checkbox"/>
			(Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/>
			Payroll <input type="checkbox"/>
			Noncash <input type="checkbox"/>
			(Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/>
			Payroll <input type="checkbox"/>
			Noncash <input type="checkbox"/>
			(Complete Part II for noncash contributions)

Name of organization BF & ROSE H PERKINS FOUNDATION	Employer identification number 83-0138740
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Part II	Noncash Property
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(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
	(See instructions) Use duplicate copies of Part II if additional space is needed _____ _____ _____	\$ _____	_____
	_____ _____ _____	\$ _____	_____
	_____ _____ _____	\$ _____	_____
	_____ _____ _____	\$ _____	_____
	_____ _____ _____	\$ _____	_____
	_____ _____ _____	\$ _____	_____
	_____ _____ _____	\$ _____	_____
	_____ _____ _____	\$ _____	_____

Name of organization BF & ROSE H PERKINS FOUNDATION	Employer identification number 83-0138740
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Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ▶ \$ _____
Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>

(e) Transfer of gift Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
<hr/> <hr/>	<hr/> <hr/>

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>

(e) Transfer of gift Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
<hr/> <hr/>	<hr/> <hr/>

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>

(e) Transfer of gift Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
<hr/> <hr/>	<hr/> <hr/>

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>

(e) Transfer of gift Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
<hr/> <hr/>	<hr/> <hr/>