### \*\* PUBLIC DISCLOSURE COPY \*\*

990

Return of Organization Exempt From Income Tax
Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

Open to Public

Internal Revenue Service

▶ Do not enter social security numbers on this form as it may be made public. ► Go to www.irs.gov/Form990 for instructions and the latest information.

Inspection

OMB No. 1545-0047

| Α                           | For t                         | he 20                | 017 calendar year, or tax year beginning  | and                                 | ending      | _             |                            |                                |
|-----------------------------|-------------------------------|----------------------|---|-------------------------------------|-------------|---------------|----------------------------|--------------------------------|
| В                           | Check<br>applic               | if<br>able:          | C Name of organization  |                                     |             | D Em          | ployer identific           | cation number                  |
| Σ                           | Add<br>cha                    |                      | STARKEY HEARING FOUNDA  | TION                                |             |               |                            |                                |
|                             |                               | ne<br>nge            | Doing business as   |                                     |             |               | 36-3                       | 297852                         |
|                             | Initi<br>retu<br>Fina<br>retu | ırn<br>al            | Number and street (or P.O. box if mail is not del 6801 WASHINGTON AVENUE                            |                                     | Room/suite  | E Tele        | ephone number<br>2 6 6 – 8 | 354-3254                       |
|                             |                               | nin-                 | City or town, state or province, country, and   | ZIP or foreign postal code          | I.          | G Gross       | s receipts \$              | 27,848,205.                    |
|                             | lret∟                         |                      | EDINA, MN 55439   |                                     |             | H(a) Is       | this a group re            | turn                           |
|                             | tiòr                          | olica-<br>I<br>Iding | F Name and address of principal officer:RIC SAME AS C ABOVE   | HARD BROWN                          |             |               | r subordinates             |                                |
| _                           |                               |                      |   | (incort no.) 4047(a)(4)             | - FO        | - ' '         |                            | cluded? Yes No                 |
|                             |                               |                      | ot status: X 501(c)(3) 501(c)( )  ► WWW.STARKEYHEARINGFOUN  | (insert no.) 4947(a)(1)             | or 52       | ┥             |                            | list. (see instructions)       |
|                             |                               |                      |   | sociation Other                     | I Von       |               | roup exemption             | State of legal domicile: MN    |
|                             | art l                         |                      | ummary  | Sociation Other                     | L Teal      | UI IUIIIIai   | 1011. 1701   N             | State of legal doffliche, FIII |
|                             | 1                             |                      | efly describe the organization's mission or most  | significant activities: GIVE        | THE (       | GIFT          | OF HEAR                    | ING TO                         |
| Governance                  | Ι.                            | TI                   | HOSE IN NEED EMPOWERING   | THEM TO ACHIEVE                     | THEI        | R POT         | ENTIAL.                    |                                |
| rna                         | 2                             | Ch                   | eck this box  if the organization disco   | ntinued its operations or dispo     | sed of mor  | e than 25     | 5% of its net as           | sets.                          |
| ove                         | 3                             |                      | mber of voting members of the governing body  |                                     |             |               |                            | 5                              |
|                             | 4                             |                      | mber of independent voting members of the go  |                                     |             |               |                            | 5                              |
| es 8                        | 5                             |                      | al number of individuals employed in calendar y   |                                     |             |               |                            | 27                             |
| Ϋ́                          | 6                             |                      | al number of volunteers (estimate if necessary)   |                                     |             |               |                            | 450                            |
| Activities &                | 7                             | <b>a</b> Tot         | al unrelated business revenue from Part VIII, co  | lumn (C), line 12                   |             |               | 7a                         | 0.                             |
| _                           |                               | <b>b</b> Ne          | t unrelated business taxable income from Form   | 990-T, line 34                      |             |               | 7b                         | 0.                             |
|                             |                               |                      |   |                                     |             | Prio          | or Year                    | Current Year                   |
| ne                          | 8                             |                      | ntributions and grants (Part VIII, line 1h)   |                                     |             |               | 95,263.                    | 26,009,339.                    |
| Revenue                     | 9                             |                      |   |                                     |             |               | 83,096.                    | 1,490,258.                     |
| Вè                          | 10                            |                      | estment income (Part VIII, column (A), lines 3, 4   |                                     |             |               | 36,584.<br>54,707.         | 64,805.                        |
|                             | 11                            |                      | ner revenue (Part VIII, column (A), lines 5, 6d, 8c   |                                     |             |               | 69,650.                    | 27,555,292.                    |
|                             | 12                            |                      | al revenue - add lines 8 through 11 (must equal   |                                     |             |               | 49,684.                    | 15,458,963.                    |
|                             | 13                            |                      | ants and similar amounts paid (Part IX, column (  |                                     |             | 14,5          | 0.                         | 0.                             |
| "                           | 14                            |                      | nefits paid to or for members (Part IX, column (A<br>aries, other compensation, employee benefits ( |                                     |             | 1.6           | 53,784.                    | 2,098,564.                     |
| Expenses                    | 16                            |                      | ofessional fundraising fees (Part IX, column (A), I   |                                     |             | ,             | 0.                         | 0.                             |
| per                         | '                             | <b>b</b> Tot         | ral fundraising expenses (Part IX, column (D), lin  | e 25) <b>&gt;</b> 1,125,9           | 28.         |               | -                          |                                |
| й                           | 17                            |                      | ner expenses (Part IX, column (A), lines 11a-11d  |                                     |             | 7,0           | 55,921.                    | 9,139,777.                     |
|                             |                               |                      | al expenses. Add lines 13-17 (must equal Part I   |                                     |             |               | 59,389.                    | 26,697,304.                    |
|                             |                               |                      | venue less expenses. Subtract line 18 from line   |                                     |             | 5             | 10,261.                    | 857,988.                       |
| Net Assets or Find Balances |                               |                      |   |                                     | В           | eginning o    | of Current Year            | End of Year                    |
| sets                        | 20                            | Tot                  | al assets (Part X, line 16)   |                                     |             |               | 37,821.                    | 15,983,655.                    |
| A P                         | 21                            | Tot                  | al liabilities (Part X, line 26)  |                                     |             |               | 15,760.                    | 1,484,495.                     |
|                             |                               |                      | t assets or fund balances. Subtract line 21 from  | line 20                             |             | 13,4          | 22,061.                    | 14,499,160.                    |
|                             |                               |                      | Signature Block   |                                     |             |               |                            |                                |
|                             |                               |                      | s of perjury, I declare that I have examined this return,   |                                     |             |               | -                          | / knowledge and belief, it is  |
| true                        | , con                         | ect, a               | nd complete. Declaration of preparer (other than office   | er) is based on an information of w | men prepare | i iias aiiy i | Knowleage.                 |                                |
| e:                          |                               |                      | Signature of officer  |                                     |             |               | <u>Date</u>                |                                |
| Sig<br>He                   |                               |                      | RICHARD BROWN, PRESIDE  | NΤ                                  |             |               |                            |                                |
| пе                          | re                            |                      | Type or print name and title  | 14.1                                |             |               |                            |                                |
|                             |                               | Pr                   | int/Type preparer's name  | Preparer's signature                |             | Date          | Check                      | PTIN                           |
| Pai                         | d                             |                      | DDD A. JACKSON  |                                     |             |               | if self-employe            | P00092672                      |
|                             | pare                          |                      | m's name RSM US LLP   |                                     |             |               | Firm's EIN                 | 42-0714325                     |
|                             | Only                          |                      | m's address 801 NICOLLET MAL  | L, SUITE 1100                       |             |               |                            |                                |
|                             | •                             |                      | MINNEAPOLIS, MN   |                                     |             |               | Phone no. 61               | 2-332-4300                     |
| Ma                          | y the                         | IRS                  | discuss this return with the preparer shown abo   | ove? (see instructions)             |             |               |                            | X Yes No                       |

| Par            | Till Statement of Program Service Accomplishments  Check if Schedule O contains a response or note to any line in this Part III  |
|----------------|--|
| 1              | Check if Schedule O contains a response or note to any line in this Part III  Briefly describe the organization's mission:   |
| •              | GIVE THE GIFT OF HEARING TO THOSE IN NEED EMPLOWERING THEM TO ACHIEVE  |
|                | THEIR POTENTIAL.   |
|                |  |
|                |  |
| 2              | Did the organization undertake any significant program services during the year which were not listed on the   |
|                | prior Form 990 or 990-EZ?  |
|                | If "Yes," describe these new services on Schedule O.   |
| 3              | Did the organization cease conducting, or make significant changes in how it conducts, any program services? Yes X No  |
|                | If "Yes," describe these changes on Schedule O.  |
| 4              | Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses.   |
|                | Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported. |
|                | (Code: ) (Expenses \$ 13,970,472. including grants of \$ 5,222,963.) (Revenue \$   |
| <del>1</del> a | INTERNATIONAL PROGRAM  |
|                | WE SUPPORT HEARING HEALTHCARE MISSIONS AROUND THE WORLD AND OPERATE  |
|                | SUSTAINABLE COMMUNITY-BASED HEARING HEALTH PARTNERSHIPS IN 62 COUNTRIES  |
|                | WORKING WITH NATIONAL GOVERNMENTS, REGIONAL GOVERNMENTS, PUBLIC HEALTH   |
|                | LEADERS AND LEADING NGOS. THE FOUNDATION PROVIDES HEARING HEALTH   |
|                | TRAINING FOR COMMUNITY HEALTH WORKERS, ALLIED HEALTH PROFESSIONALS, AND  |
|                | MEMBERS OF THE GENERAL PUBLIC. OUR PROGRAMS RANGE FROM THREE-DAY   |
|                | INTRODUCTORY BASIC EDUCATION OPPORTUNITIES TO FULL-YEAR, ACCREDITED,   |
|                | PROFESSIONAL EAR AND HEARING HEALTH TRAINING AT THE STARKEY HEARING  |
|                | INSTITUTE, IN ZAMBIA, SEEKING TO ADDRESS THE DIRE SHORTAGE OF HEARING  |
|                | HEALTHCARE PROFESSIONALS IN AFRICA. THE CURRICULUM INCLUDES THE  |
|                | HANDS-ON INTENSIVE WFA COMMUNITY-BASED HEARING HEALTHCARE PROGRAM,   |
| 4b             | (Code: ) (Expenses \$ 10,366,788. including grants of \$ 10,236,000.) (Revenue \$ 1,490,258.)  |
|                | DOMESTIC PROGRAM   |
|                | WE ALSO PROVIDE HEARING HEALTH CARE TO LOW-INCOME AMERICANS. THE   |
|                | FOUNDATION PARTNERS WITH LOCAL AUDIOLOGISTS WHO VOLUNTEER THEIR  |
|                | PROFESSIONAL SERVICES TO SERVE PATIENTS. IF SUCH AN AUDIOLOGIST  |
|                | DETERMINES THAT A PATIENT NEEDS HEARING DEVICES AND THE PATIENT  |
|                | QUALIFIES FINANCIALLY FOR THE PROGRAM, THE AUDIOLOGIST WORKS WITH US TO  |
|                | GET THE PROPER HEARING DEVICES FOR THE PATIENT AND THE AUDIOLOGIST THEN  |
|                | FITS THEM TO THE PATIENT. THIS PROGRAM IS PROVIDED AT NO COST TO   |
|                | INDIVIDUALS WHO MEET CERTAIN FINANCIAL CRITERIA. AS PART OF OUR  |
|                | DOMESTIC PROGRAM, THE FOUNDATION ALSO COLLECTS USED HEARING DEVICES AND  |
|                | REPURPOSES THEM FOR USE IN FUTURE INTERNATIONAL MISSIONS.  |
|                |  |
| 4c             | (Code:) (Expenses \$   |
|                |  |
|                |  |
|                |  |
|                |  |
|                |  |
|                |  |
|                |  |
|                |  |
|                |  |
|                |  |
|                |  |
| 4d             | Other program services (Describe in Schedule O.)   |
|                | (Expenses \$ including grants of \$ ) (Revenue \$ )  |
| 4e             | Total program service expenses ► 24,337,260.   |
|                | 5 000 (co. =)  |

# Form 990 (2017) STARKEY HEARING FOUNDATION Part IV Checklist of Required Schedules

|           |  |           | Yes | No               |
|-----------|--|-----------|-----|------------------|
| 1         | Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)?  | 1         | х   |                  |
| 2         | If "Yes," complete Schedule A  | 2         | X   |                  |
| 3         | Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for  |           |     |                  |
| 3         | public office? If "Yes," complete Schedule C, Part I   | 3         |     | Х                |
| 4         | Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect   |           |     |                  |
|           | during the tax year? If "Yes," complete Schedule C, Part II  | 4         |     | Х                |
| 5         | Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or   |           |     |                  |
|           | similar amounts as defined in Revenue Procedure 98-19? If "Yes," complete Schedule C, Part III   | 5         |     | Х                |
| 6         | Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to  |           |     |                  |
|           | provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I   | 6         |     | Х                |
| 7         | Did the organization receive or hold a conservation easement, including easements to preserve open space,  |           |     |                  |
|           | the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II   | 7         |     | Х                |
| 8         | Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If</i> "Yes," <i>complete Schedule D, Part III</i>  | 8         |     | Х                |
| 9         | Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for  |           |     |                  |
|           | amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services?  |           |     |                  |
|           | If "Yes," complete Schedule D, Part IV   | 9         |     | Х                |
| 10        | Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? <i>If</i> "Yes," <i>complete Schedule D, Part V</i>               | 10        |     | х                |
| 11        | If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VIII, VIII, IX, or X  |           |     |                  |
|           | as applicable.   |           |     |                  |
| а         | Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D,  |           |     |                  |
|           | Part VI  | 11a       | Х   |                  |
| b         | Did the organization report an amount for investments - other securities in Part X, line 12 that is 5% or more of its total  |           |     |                  |
|           | assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII  | 11b       |     | Х                |
| С         | Did the organization report an amount for investments - program related in Part X, line 13 that is 5% or more of its total   |           |     |                  |
|           | assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII   | 11c       |     | X                |
| d         | Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in   |           |     |                  |
|           | Part X, line 16? If "Yes," complete Schedule D, Part IX  | 11d       |     | X                |
| е         | Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X  | 11e       |     | X                |
| f         | Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses  |           | 77  |                  |
|           | the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part X   | 11f       | Х   |                  |
| 12a       | Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete  |           | Х   |                  |
| L         | Schedule D, Parts XI and XII  Was the experientian included in consolidated independent sudited financial attemperate for the tay year?  | 12a       | Λ   |                  |
| a         | Was the organization included in consolidated, independent audited financial statements for the tax year?  If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional | 106       |     | X                |
| 13        | Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E  | 12b<br>13 |     | X                |
| 13<br>14a | Did the organization maintain an office, employees, or agents outside of the United States?  | 14a       | Х   | <del>- ^ `</del> |
|           | Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business,  | та        |     |                  |
| 5         | investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000   |           |     |                  |
|           | or more? If "Yes," complete Schedule F, Parts I and IV   | 14b       | х   |                  |
| 15        | Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any  |           |     |                  |
|           | foreign organization? If "Yes," complete Schedule F, Parts II and IV   | 15        |     | Х                |
| 16        | Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to   |           |     |                  |
|           | or for foreign individuals? If "Yes," complete Schedule F, Parts III and IV  | 16        | Х   |                  |
| 17        | Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX,  |           |     |                  |
|           | column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I   | 17        |     | X                |
| 18        | Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines   |           |     |                  |
|           | 1c and 8a? If "Yes," complete Schedule G, Part II  | 18        | X   |                  |
| 19        | Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes,"   | [         |     | v                |
|           | complete Schedule G, Part III  | 19        |     | X                |

Form **990** (2017)

# Form 990 (2017) STARKEY HEARING FO Part IV Checklist of Required Schedules (continued)

|             |   |          | Yes | No            |
|-------------|---|----------|-----|---------------|
| <b>20</b> a | Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H                                     | 20a      |     | X             |
| b           | If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?                    | 20b      |     |               |
| 21          | Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or                     |          |     |               |
|             | domestic government on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II                               | 21       | Х   |               |
| 22          | Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on                   |          |     |               |
|             | Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III   | 22       | X   |               |
| 23          | Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current      |          |     |               |
|             | and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes," complete                  |          |     |               |
|             | Schedule J  | 23       | X   |               |
| 24a         | Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the         |          |     |               |
|             | last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete              |          |     |               |
|             | Schedule K. If "No", go to line 25a   | 24a      |     | Х             |
| b           | Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?                               | 24b      |     |               |
|             | Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease            |          |     |               |
|             | any tax-exempt bonds?   | 24c      |     |               |
| d           | Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?                         | 24d      |     |               |
|             | Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit                    |          |     |               |
|             | transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I                                   | 25a      |     | Х             |
| b           | Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and      |          |     |               |
| -           | that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete           |          |     |               |
|             | Schedule L, Part I  | 25b      |     | х             |
| 26          | Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or           |          |     |               |
|             | former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? If "Yes,"          |          |     |               |
|             | complete Schedule L, Part II  | 26       |     | х             |
| 27          | Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial            |          |     |               |
|             | contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member             |          |     |               |
|             | of any of these persons? If "Yes," complete Schedule L, Part III  | 27       |     | х             |
| 28          | Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV               |          |     |               |
|             | instructions for applicable filing thresholds, conditions, and exceptions):   |          |     |               |
| а           | A current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV                         | 28a      |     | х             |
| b           | A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV      | 28b      |     | Х             |
|             | An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, |          |     |               |
| ·           | director, trustee, or direct or indirect owner? If "Yes," complete Schedule L, Part IV  | 28c      |     | х             |
| 29          | Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M                        | 29       | Х   |               |
| 30          | Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation     |          |     |               |
| -           | contributions? If "Yes," complete Schedule M  | 30       |     | х             |
| 31          | Did the organization liquidate, terminate, or dissolve and cease operations?  | "        |     |               |
|             | If "Yes," complete Schedule N, Part I   | 31       |     | х             |
| 32          | Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete                | <u> </u> |     |               |
|             | Schedule N, Part II   | 32       |     | х             |
| 33          | Did the organization own 100% of an entity disregarded as separate from the organization under Regulations                      |          |     |               |
| -           | sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I   | 33       | Х   |               |
| 34          | Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and       | "        |     |               |
| ٠.          | Part V, line 1  | 34       | Х   |               |
| 35a         | Did the organization have a controlled entity within the meaning of section 512(b)(13)?   | 35a      | Х   |               |
|             | If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity       | 334      |     |               |
|             | within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2   | 35b      |     | х             |
| 36          | Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization?      |          |     | ├ <u>-</u>    |
| 55          | If "Yes," complete Schedule R, Part V, line 2   | 36       |     | x             |
| 37          | Did the organization conduct more than 5% of its activities through an entity that is not a related organization                | 33       |     | <del></del> - |
| ٠,          | and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI                    | 37       |     | x             |
| 38          | Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19?                  | "        |     | <del></del> - |
| 55          | Note. All Form 990 filers are required to complete Schedule O   | 38       | Х   |               |
|             | 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1. 1  | , 55     |     |               |

# Form 990 (2017) STARKEY HEARING FOUNDATION Part V Statements Regarding Other IRS Filings and Tax Compliance

|        | Check if Schedule O contains a response of note to any line in this part v   |         |                        |          |     | Ш  |
|--------|--|---------|------------------------|----------|-----|----|
|        |  |         | 1 10                   |          | Yes | No |
|        | Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable   | 1a      | 18                     |          |     |    |
|        | Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable  | 1b      | 0                      |          |     |    |
| С      | Did the organization comply with backup withholding rules for reportable payments to vendors and r   |         |                        |          | v   |    |
|        | (gambling) winnings to prize winners?  | <br>I   | I                      | 1c       | Х   |    |
| 2a     | Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements,  |         | 27                     |          |     |    |
|        | filed for the calendar year ending with or within the year covered by this return  |         | 27                     |          | v   |    |
| b      | If at least one is reported on line 2a, did the organization file all required federal employment tax returns the control of t |         |                        | 2b       | X   |    |
| _      | Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions   |         |                        |          |     | v  |
|        |  | _       |                        | 3a       |     | X  |
|        | If "Yes," has it filed a Form 990-T for this year? If "No," to line 3b, provide an explanation in Schedule   |         |                        | 3b       |     |    |
| 4a     | At any time during the calendar year, did the organization have an interest in, or a signature or other  |         |                        |          | х   |    |
|        | financial account in a foreign country (such as a bank account, securities account, or other financial   | accou   | int)?                  | 4a       | Λ   |    |
| D      | If "Yes," enter the name of the foreign country:   KENYA  Case in the part of Faurity Part of  |         | -t- (FDAD)             |          |     |    |
| E-0    | See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial A   |         |                        | Ea       |     | Х  |
|        | Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?  |         |                        | 5a<br>5b |     | X  |
|        | Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transalf "Yes," to line 5a or 5b, did the organization file Form 8886-T?   |         |                        | 5c       |     | 21 |
|        | If "Yes," to line 5a or 5b, did the organization file Form 8886-T?  Does the organization have annual gross receipts that are normally greater than \$100,000, and did the   |         |                        | 5C       |     |    |
| Va     |  | _       |                        | 6a       |     | Х  |
| h      | any contributions that were not tax deductible as charitable contributions?  |         |                        | 0a       |     |    |
| b      | were not tax deductible?   |         | -                      | 6b       |     |    |
| 7      | Organizations that may receive deductible contributions under section 170(c).  |         |                        | OD       |     |    |
| и<br>а | Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and set  | rvices  | provided to the payor? | 7a       | х   |    |
|        | If "Yes," did the organization notify the donor of the value of the goods or services provided?  |         |                        | 7b       | X   |    |
|        | Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it w   |         |                        |          |     |    |
| •      | to file Form 8282?   |         | •                      | 7c       |     | Х  |
| d      | If "Yes," indicate the number of Forms 8282 filed during the year  | 7d      |                        |          |     |    |
|        | Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit of   | ontra   | ct?                    | 7e       |     | Х  |
| f      | Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit conti   |         |                        | 7f       |     | Х  |
| g      | If the organization received a contribution of qualified intellectual property, did the organization file Fo   |         |                        | 7g       |     |    |
| h      | If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization   | ation 1 | file a Form 1098-C?    | 7h       |     |    |
| 8      | Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained  | by th   | ne                     |          |     |    |
|        | sponsoring organization have excess business holdings at any time during the year?   |         |                        | 8        |     |    |
| 9      | Sponsoring organizations maintaining donor advised funds.  |         |                        |          |     |    |
| а      | Did the sponsoring organization make any taxable distributions under section 4966?   |         |                        | 9a       |     |    |
| b      | Did the sponsoring organization make a distribution to a donor, donor advisor, or related person? $$   |         |                        | 9b       |     |    |
| 10     | Section 501(c)(7) organizations. Enter:  |         | 1                      |          |     |    |
|        | Initiation fees and capital contributions included on Part VIII, line 12   | 10a     |                        |          |     |    |
|        | Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities  | 10b     |                        |          |     |    |
| 11     | Section 501(c)(12) organizations. Enter:   | 1       | 1                      |          |     |    |
|        | Gross income from members or shareholders  | 11a     |                        |          |     |    |
| b      | Gross income from other sources (Do not net amounts due or paid to other sources against   | ١       |                        |          |     |    |
| 40-    | amounts due or received from them.)  | 11b     | <u> </u>               | 40-      |     |    |
|        | Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form   | ı       | ?<br>                  | 12a      |     |    |
|        | If "Yes," enter the amount of tax-exempt interest received or accrued during the year  | 12b     |                        |          |     |    |
| 13     | Section 501(c)(29) qualified nonprofit health insurance issuers.   |         |                        | 120      |     |    |
| а      | Is the organization licensed to issue qualified health plans in more than one state?   |         |                        | 13a      |     |    |
| h      | <b>Note.</b> See the instructions for additional information the organization must report on Schedule O.   |         |                        |          |     |    |
| b      | Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans  | 13b     | 1                      |          |     |    |
| ^      | Enter the amount of reserves on hand   | 13c     |                        |          |     |    |
|        | Did the consideration and the consideration of the constant of |         |                        | 14a      |     | X  |
|        | If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedul   |         |                        | 14b      |     |    |
| ~      |  | . · ·   |                        |          |     |    |

Part VI Governance, Management, and Disclosure For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

|            | Check if Schedule O contains a response or note to any line in this Part VI   |          |      | X    |
|------------|---|----------|------|------|
| Sec        | tion A. Governing Body and Management   |          |      |      |
|            |   |          | Yes  | No   |
| 1a         | Enter the number of voting members of the governing body at the end of the tax year   | <u> </u> |      |      |
|            | If there are material differences in voting rights among members of the governing body, or if the governing                                     |          |      |      |
|            | body delegated broad authority to an executive committee or similar committee, explain in Schedule O.   |          |      |      |
| b          | Enter the number of voting members included in line 1a, above, who are independent 1b   | <u> </u> |      |      |
| 2          | Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other                        |          |      |      |
|            | officer, director, trustee, or key employee?  | 2        |      | X    |
| 3          | Did the organization delegate control over management duties customarily performed by or under the direct supervision                           |          |      |      |
|            | of officers, directors, or trustees, or key employees to a management company or other person?  | 3        |      | X    |
| 4          | Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?                                | 4        |      | Х    |
| 5          | Did the organization become aware during the year of a significant diversion of the organization's assets?                                      | 5        |      | Х    |
| 6          | Did the organization have members or stockholders?  | 6        |      | Х    |
| 7a         | Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or                                  |          |      |      |
|            | more members of the governing body?   | 7a       |      | X    |
| b          | Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or                              |          |      |      |
|            | persons other than the governing body?  | 7b       |      | X    |
| 8          | Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:               |          |      |      |
| а          | The governing body?   | 8a       | Х    |      |
| b          | Each committee with authority to act on behalf of the governing body?   | 8b       | Х    |      |
| 9          | Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the                            |          |      |      |
|            | organization's mailing address? If "Yes," provide the names and addresses in Schedule O   | 9        |      | X    |
| <u>Sec</u> | tion B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)                                |          |      |      |
|            |   |          | Yes  | No   |
|            | Did the organization have local chapters, branches, or affiliates?  | 10a      |      | Х    |
| b          | If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates,                      |          |      |      |
|            | and branches to ensure their operations are consistent with the organization's exempt purposes?   | 10b      |      |      |
|            | Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?                     | 11a      | Х    |      |
| b          | Describe in Schedule O the process, if any, used by the organization to review this Form 990.   |          | 37   |      |
| 12a        | Did the organization have a written conflict of interest policy? If "No," go to line 13   | 12a      | X    |      |
|            | Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?             | 12b      | Х    |      |
| С          | Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe                              |          | 37   |      |
|            | in Schedule O how this was done   | 12c      | X    |      |
| 13         | Did the organization have a written whistleblower policy?   | 13       | X    |      |
| 14         | Did the organization have a written document retention and destruction policy?  | 14       | X    |      |
| 15         | Did the process for determining compensation of the following persons include a review and approval by independent                              |          |      |      |
|            | persons, comparability data, and contemporaneous substantiation of the deliberation and decision?   |          | 37   |      |
|            | The organization's CEO, Executive Director, or top management official  | 15a      | X    |      |
| b          | Other officers or key employees of the organization   | 15b      | X    |      |
|            | If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions).   |          |      |      |
| 16a        | Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a                           |          |      | v    |
|            | taxable entity during the year?   | 16a      |      | X    |
| b          | If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation                    |          |      |      |
|            | in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's                                  |          |      |      |
| <u> </u>   | exempt status with respect to such arrangements?  | 16b      |      |      |
|            | tion C. Disclosure  | тт       | ΤC   | ΖV   |
| 17         | List the states with which a copy of this Form 990 is required to be filed AL, AK, AR, CA, CO, CT, FL, GA, HI                                   |          |      | , 11 |
| 18         | Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (Section 501(c)(3)s only)                  | availab  | ie   |      |
|            | for public inspection. Indicate how you made these available. Check all that apply.   |          |      |      |
| 46         | X Own website Another's website X Upon request Other (explain in Schedule O)  |          |      |      |
| 19         | Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, an                  | u tinan  | cial |      |
| 00         | statements available to the public during the tax year.   |          |      |      |
| 20         | State the name, address, and telephone number of the person who possesses the organization's books and records:   BRUCE SCHMALTZ - 866-354-3254 |          |      |      |
|            | 6801 WASHINGTON AVENUE SOUTH EDINA MN 55439   |          |      |      |

### Part VII Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

Check if Schedule O contains a response or note to any line in this Part VII

#### Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

- 1a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.
- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
  - List all of the organization's current key employees, if any. See instructions for definition of "key employee."
- List the organization's five current highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons.

| Check this box if neither the organization nor any relation (A) (B) |                          | <del>g</del> c  |                       |         | C)                    |                              |          | (D)             | (E)             | (F)                         |
|---|--------------------------|---|-----------------------|---------|-----------------------|------------------------------|----------|-----------------|-----------------|-----------------------------|
| Name and Title  | Average                  |   | Position              |         |                       |                              |          | Reportable      | Reportable      | Estimated                   |
| rane and me   | hours per                | (do not check more than one box, unless person is both an |                       |         |                       |                              | h an     | compensation    | compensation    | amount of                   |
|   | week                     | $\vdash$  | cer ar                | nd a d  | d a director/trustee) |                              |          | from            | from related    | other                       |
|   | (list any                | Individual trustee or director                            |                       |         |                       |                              |          | the             | organizations   | compensation                |
|   | hours for                | or di   | ae                    |         |                       | ated                         |          | organization    | (W-2/1099-MISC) | from the                    |
|   | related<br>organizations | ustee   | trust                 |         | ee<br>ee              | npens                        |          | (W-2/1099-MISC) |                 | organization<br>and related |
|   | below                    | dual tr   | tional                | ١.      | nploy                 | st cor                       | _        |                 |                 | organizations               |
|   | line)                    | ndivic  | Institutional trustee | Officer | Key employee          | Highest compensated employee | Former   |                 |                 | 5.ga <u>_</u> a55           |
| (1) RICHARD BROWN   | 20.00                    | _   | _                     |         | _                     |                              |          |                 |                 |                             |
| PRESIDENT/BOARD CHAIR   |                          | Х   |                       | Х       |                       |                              |          | 0.              | 0.              | 0.                          |
| (2) ELIZABETH TULACH  | 3.00                     |   |                       |         |                       |                              |          |                 |                 |                             |
| VICE PRESIDENT  |                          | Х   |                       | Х       |                       |                              |          | 0.              | 0.              | 0.                          |
| (3) JEFF PAPINEAU   | 3.00                     |   |                       |         |                       |                              |          |                 |                 |                             |
| TREASURER   |                          | Х   |                       | Х       |                       |                              |          | 0.              | 0.              | 0.                          |
| (4) BENJAMIN HOPPS  | 3.00                     |   |                       |         |                       |                              |          |                 |                 |                             |
| DIRECTOR  |                          | Х   |                       |         |                       |                              |          | 0.              | 0.              | 0.                          |
| (5) DR. PAUL NASH   | 3.00                     |   |                       |         |                       |                              |          |                 |                 |                             |
| DIRECTOR  |                          | Х   |                       |         |                       |                              |          | 0.              | 0.              | 0.                          |
| (6) SHARA PACE  | 3.00                     |   |                       |         |                       |                              |          |                 |                 |                             |
| SECRETARY   |                          |   |                       | Х       |                       |                              |          | 42,303.         | 0.              | 0.                          |
| (7) BRUCE SCHMALTZ  | 40.00                    |   |                       |         |                       |                              |          |                 |                 |                             |
| CHIEF FINANCIAL OFFICER   |                          |   |                       |         | Х                     |                              |          | 166,100.        | 0.              | 20,909.                     |
| (8) LUQMAN LAWAL  | 40.00                    |   |                       |         |                       |                              |          |                 |                 |                             |
| DIRECTOR OF GLOBAL HEALTH & RESEARCH                                |                          |   |                       |         |                       | Х                            |          | 111,950.        | 0.              | 17,009.                     |
|   |                          |   |                       |         |                       |                              |          |                 |                 |                             |
|   |                          |   |                       |         |                       |                              |          |                 |                 |                             |
|   |                          |   |                       |         |                       |                              |          |                 |                 |                             |
|   |                          |   |                       |         |                       |                              |          |                 |                 |                             |
|   |                          |   |                       |         |                       |                              |          |                 |                 |                             |
|   |                          |   |                       |         |                       |                              |          |                 |                 |                             |
|   |                          |   |                       |         |                       |                              |          |                 |                 |                             |
|   |                          |   |                       |         |                       |                              |          |                 |                 |                             |
|   |                          |   |                       |         |                       |                              |          |                 |                 |                             |
|   |                          |   |                       |         |                       |                              |          |                 |                 |                             |
|   |                          |   |                       |         |                       |                              |          |                 |                 |                             |
|   |                          |   | _                     | _       |                       | _                            | <u> </u> |                 |                 |                             |
|   |                          | 1   |                       |         |                       |                              |          |                 |                 |                             |
|   |                          | _   |                       |         | _                     |                              |          |                 |                 |                             |
|   |                          | -   |                       |         |                       |                              |          |                 |                 |                             |
|   |                          | -   | _                     | _       | _                     | _                            |          |                 |                 |                             |
|   |                          | -   |                       |         |                       |                              |          |                 |                 |                             |
|   | 1                        | 1   | l                     | ı       | l                     | l                            | l        | 1               |                 |                             |

| Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued) |                             |                                |                                      |         |   |                                 |              |                          |                     |                   |         |         |     |
|---|-----------------------------|--------------------------------|--------------------------------------|---------|---|---------------------------------|--------------|--------------------------|---------------------|-------------------|---------|---------|-----|
| (A)   | (B)                         |                                |                                      |         | C)  |                                 |              | (D) (E)                  |                     |                   |         | (F)     |     |
| Name and title  | Average                     | (do                            | Position (do not check more than one |         |   |                                 | Reportable   | Estima                   |                     | timate            | ed      |         |     |
|   | hours per                   | box                            | box, unless person is both           |         | box, unless person is both an officer and a director/trustee) |                                 | compensation | compensatio              | n                   | am                | nount   | of      |     |
|   | week                        | $\vdash$                       |                                      |         | irecto  | irector/trustee)                |              | from                     | from related        | 1                 |         | other   |     |
|   | (list any                   | ector                          |                                      |         |   |                                 |              | the                      | organizations       |                   |         | pensa   |     |
|   | hours for                   | or di                          | يو                                   |         |   | ated                            |              | organization             | (W-2/1099-MIS       | 3C)               |         | om th   |     |
|   | related                     | stee                           | truste                               |         | , n   | bens                            |              | (W-2/1099-MISC)          |                     |                   | _       | anizat  |     |
|   | organizations<br>below      | lal fr                         | onal t                               |         | oloye   | ee com                          |              |                          |                     |                   |         | d relat |     |
|   | line)                       | Individual trustee or director | Institutional trustee                | Officer | Key employee  | Highest compensated<br>employee | Former       |                          |                     |                   | orga    | anizati | ons |
|   |                             | ١                              | ü                                    | ð       | ā,  | 主旨                              | 요            |                          |                     |                   |         |         |     |
|   |                             | 1                              |                                      |         |   |                                 |              |                          |                     |                   |         |         |     |
|   | _                           |                                |                                      |         | $\vdash$  | -                               |              |                          |                     | $\longrightarrow$ |         |         |     |
|   |                             | -                              |                                      |         |   |                                 |              |                          |                     |                   |         |         |     |
|   |                             |                                |                                      |         | $\vdash$  | 1                               |              |                          |                     | -+                |         |         |     |
|   |                             | 1                              |                                      |         |   |                                 |              |                          |                     |                   |         |         |     |
|   | _                           |                                |                                      |         | $\vdash$  |                                 |              |                          |                     | -+                |         |         |     |
|   |                             | 1                              |                                      |         |   |                                 |              |                          |                     |                   |         |         |     |
|   |                             |                                |                                      |         |   |                                 |              |                          |                     |                   |         |         |     |
|   |                             |                                |                                      |         |   |                                 |              |                          |                     | $\longrightarrow$ |         |         |     |
|   |                             | ┨                              |                                      |         |   |                                 |              |                          |                     |                   |         |         |     |
|   |                             |                                |                                      |         |   |                                 |              |                          |                     |                   |         |         |     |
|   |                             |                                |                                      |         |   |                                 |              |                          |                     |                   |         |         |     |
|   |                             |                                |                                      |         |   |                                 |              |                          |                     |                   |         |         |     |
|   |                             | _                              |                                      |         | <u> </u>  | -                               |              |                          |                     | $\longrightarrow$ |         |         |     |
|   |                             | -                              |                                      |         |   |                                 |              |                          |                     |                   |         |         |     |
| 1b Sub-total  |                             |                                |                                      |         | <u> </u>  | <u> </u>                        |              | 320,353.                 |                     | 0.                | 3       | 7,9     | 18. |
| c Total from continuation sheets to Part  |                             |                                |                                      |         |   |                                 |              | 0.                       |                     | 0.                |         | - , -   | 0.  |
| d Total (add lines 1b and 1c)   |                             |                                |                                      |         |   |                                 |              | 320,353.                 |                     | 0.                | 3       | 7,9     |     |
| Total number of individuals (including but  |                             |                                |                                      |         |   |                                 | no re        |                          | 0.000 of reportable | e                 |         |         |     |
| compensation from the organization  |                             |                                |                                      |         |   | .,                              | •            |                          | ,                   |                   |         |         | 2   |
|   |                             |                                |                                      |         |   |                                 |              |                          |                     |                   | $\Box$  | Yes     | No  |
| 3 Did the organization list any former office   | er, director, or tr         | uste                           | e. ke                                | ev er   | olam  | ovee                            | . or l       | highest compensated e    | mplovee on          | Г                 |         |         |     |
| line 1a? If "Yes," complete Schedule J fo   |                             |                                |                                      |         |   |                                 |              | g                        |                     |                   | 3       |         | Х   |
| 4 For any individual listed on line 1a, is the  |                             |                                |                                      |         |   |                                 |              |                          |                     |                   |         |         |     |
| and related organizations greater than \$   |                             |                                |                                      |         |   |                                 |              |                          |                     |                   | 4       | Х       |     |
| 5 Did any person listed on line 1a receive of   |                             |                                |                                      |         |   |                                 |              |                          |                     |                   |         |         |     |
| rendered to the organization? If "Yes," co  | •                           |                                |                                      |         | •   | ,                               | Clat         | ed organization or indiv | iddai ioi seivices  |                   | 5       |         | Х   |
| Section B. Independent Contractors  | mpicie odn <del>e</del> dul | 001                            | JI 30                                | acii    | دات   | 3011                            |              |                          |                     |                   |         |         |     |
| Complete this table for your five highest   | compensated in              | depe                           | ende                                 | ent c   | ont   | racto                           | ors t        | hat received more than   | \$100,000 of corr   | npens:            | ation f | rom     |     |
| the organization. Report compensation for   |                             |                                |                                      |         |   |                                 |              |                          |                     |                   |         |         |     |
| (A)   |                             |                                |                                      |         |   |                                 |              | (B)                      |                     |                   | (C      | ;)      |     |

| (A) Name and business address   | (B) Description of services     | (C)<br>Compensation |
|---|---------------------------------|---------------------|
| TRINITY INSTITUTE, PLOT 6 PRINX, PO BOX   |                                 | 452 244             |
|   | MANAGEMENT SERVICES             | 473,341.            |
| MHC CULINARY GROUP, 175 WEST KELLOGG BLVD,  | CAMEDING CEDITORS               | 246 540             |
| SUITE 503, SAINT PAUL, MN 55102 LINDQUIST & VENNUM, 80 SOUTH EIGHT STREET,          | CATERING SERVICES               | 246,548.            |
| · · · · · · · · · · · · · · · · · · ·   | LEGAL                           | 226,449.            |
| VISUAL HORIZON COMMUNICATIONS, 1055   | BIGNE                           | 220,449.            |
| •   | CONTRACT SERVICES               | 180,679.            |
| PROPEL EVENT TRANSPORTATION MANAGEMENT  |                                 |                     |
| LLC, 2527 1ST AVEENUE EAST, NORTH ST.   | CONTRACT SERVICES               | 144,383.            |
| 2 Total number of independent contractors (including but not limited to those liste | d above) who received more than |                     |
| \$100,000 of compensation from the organization \$                                  |                                 |                     |

36-3297852 STARKEY HEARING FOUNDATION Page 9 Form 990 (2017) Part VIII Statement of Revenue Check if Schedule O contains a response or note to any line in this Part VIII (B) (C) (**D)** Revenue excluded Related or Unrelated Total revenue from tax under exempt function husiness revenue revenue Contributions, Gifts, Grants and Other Similar Amounts 1 a Federated campaigns **b** Membership dues ..... 1b 5,860,278. c Fundraising events d Related organizations 1d e Government grants (contributions) f All other contributions, gifts, grants, and similar amounts not included above ..... 20,149,061 17,329,704. g Noncash contributions included in lines 1a-1f: \$ 26,009,339. h Total. Add lines 1a-1f ... Business Code 2 a HEAR NOW PROGRAM APPLICATION FEES Program Service Revenue 621300 1,490,258. 1,490,258 С f All other program service revenue 1,490,258. g Total. Add lines 2a-2f ..... Investment income (including dividends, interest, and 64,805 64,805. other similar amounts) Income from investment of tax-exempt bond proceeds 5 Royalties ..... (i) Real (ii) Personal 6 a Gross rents **b** Less: rental expenses ...... c Rental income or (loss) d Net rental income or (loss) ... 7 a Gross amount from sales of (i) Securities (ii) Other assets other than inventory b Less: cost or other basis and sales expenses c Gain or (loss) d Net gain or (loss) 8 a Gross income from fundraising events (not Revenue including \$ 5,860,278. of contributions reported on line 1c). See Part IV, line 18 a 283 803 Other 292,913 b Less: direct expenses \_\_\_\_\_ b c Net income or (loss) from fundraising events -9,110 -9,110. 9 a Gross income from gaming activities. See Part IV, line 19 a **b** Less: direct expenses c Net income or (loss) from gaming activities ... 10 a Gross sales of inventory, less returns and allowances \_\_\_\_\_a b Less: cost of goods sold \_\_\_\_\_ b c Net income or (loss) from sales of inventory Miscellaneous Revenue **Business Code** 11 a b **d** All other revenue

55,695.

e Total. Add lines 11a-11d

Total revenue. See instructions.

27,555,292.

1,490,258.

# Form 990 (2017) STARKEY HEARING FOUNDATION Part IX | Statement of Functional Expenses

|          | Part IX Statement of Functional Expenses   |                       |                                     |                                     |                                       |  |  |  |  |
|----------|--|-----------------------|-------------------------------------|-------------------------------------|---------------------------------------|--|--|--|--|
| Secti    | on 501(c)(3) and 501(c)(4) organizations must com  |                       |                                     | omplete column (A).                 | <u> </u>                              |  |  |  |  |
|          | Check if Schedule O contains a respon  |                       |                                     | (0)                                 |                                       |  |  |  |  |
|          | not include amounts reported on lines 6b,<br>8b, 9b, and 10b of Part VIII.                   | (A)<br>Total expenses | <b>(B)</b> Program service expenses | (C) Management and general expenses | <b>(D)</b><br>Fundraising<br>expenses |  |  |  |  |
| 1        | Grants and other assistance to domestic organizations  | 450 000               | 450 000                             |                                     |                                       |  |  |  |  |
|          | and domestic governments. See Part IV, line 21   | 450,000.              | 450,000.                            |                                     |                                       |  |  |  |  |
| 2        | Grants and other assistance to domestic  | 10 006 000            | 10 006 000                          |                                     |                                       |  |  |  |  |
|          | individuals. See Part IV, line 22  | 10,236,000.           | 10,236,000.                         |                                     |                                       |  |  |  |  |
| 3        | Grants and other assistance to foreign   |                       |                                     |                                     |                                       |  |  |  |  |
|          | organizations, foreign governments, and foreign  | 4 772 062             | 4 772 062                           |                                     |                                       |  |  |  |  |
|          | individuals. See Part IV, lines 15 and 16  | 4,772,963.            | 4,772,963.                          |                                     |                                       |  |  |  |  |
| 4        | Benefits paid to or for members  |                       |                                     |                                     |                                       |  |  |  |  |
| 5        | Compensation of current officers, directors,   | 229,312.              |                                     | 229,312.                            |                                       |  |  |  |  |
| •        | trustees, and key employees  | 229,312.              |                                     | 229,312.                            |                                       |  |  |  |  |
| 6        | Compensation not included above, to disqualified   |                       |                                     |                                     |                                       |  |  |  |  |
|          | persons (as defined under section 4958(f)(1)) and  |                       |                                     |                                     |                                       |  |  |  |  |
| -        | persons described in section 4958(c)(3)(B)   | 1,625,501.            | 1,299,391.                          | 201,446.                            | 124,664.                              |  |  |  |  |
| 7<br>8   | Other salaries and wages Pension plan accruals and contributions (include                    | I, UZJ, JUI•          | 1,477,3910                          | 201,440.                            | 141,004.                              |  |  |  |  |
| Ø        | section 401(k) and 403(b) employer contributions   |                       |                                     |                                     |                                       |  |  |  |  |
| 9        | Other employee benefits  | 115,629.              | 88,629.                             | 7,733.                              | 19 267.                               |  |  |  |  |
| 10       | Payroll taxes  | 128,122.              | 88,205.                             | 20,742.                             | 19,267.<br>19,175.                    |  |  |  |  |
| 11       | Fees for services (non-employees):   |                       | 00,2001                             | 2077220                             | 23,273                                |  |  |  |  |
|          | Management   |                       |                                     |                                     |                                       |  |  |  |  |
|          | Legal  |                       |                                     |                                     |                                       |  |  |  |  |
|          | Accounting   |                       |                                     |                                     |                                       |  |  |  |  |
| d        | Lobbying   |                       |                                     |                                     |                                       |  |  |  |  |
| е        | Professional fundraising services. See Part IV, line 17                                      |                       |                                     |                                     |                                       |  |  |  |  |
| f        | Investment management fees   |                       |                                     |                                     |                                       |  |  |  |  |
| g        | Other. (If line 11g amount exceeds 10% of line 25,   |                       |                                     |                                     |                                       |  |  |  |  |
|          | column (A) amount, list line 11g expenses on Sch O.)   | 945,811.              | 416,393.                            | 454,134.                            | 75,284.<br>191,924.                   |  |  |  |  |
| 12       | Advertising and promotion  | 332,814.              | 140,890.                            |                                     | 191,924.                              |  |  |  |  |
| 13       | Office expenses  | 593,428.              | 372,088.                            | 170,673.                            | 50,667.                               |  |  |  |  |
| 14       | Information technology   |                       |                                     |                                     |                                       |  |  |  |  |
| 15       | Royalties  | 20 474                | 20 474                              |                                     |                                       |  |  |  |  |
| 16       | Occupancy  | 38,474.<br>2,756,004. | 38,474.                             | 21 672                              | 400                                   |  |  |  |  |
| 17       | Travel   | 2,750,004.            | 2,733,929.                          | 21,673.                             | 402.                                  |  |  |  |  |
| 18       | Payments of travel or entertainment expenses   |                       |                                     |                                     |                                       |  |  |  |  |
|          | for any federal, state, or local public officials  |                       |                                     |                                     |                                       |  |  |  |  |
| 19       | Conferences, conventions, and meetings   |                       |                                     |                                     |                                       |  |  |  |  |
| 20       | Interest  Payments to affiliates   |                       |                                     |                                     |                                       |  |  |  |  |
| 21<br>22 | Payments to affiliates  Depreciation, depletion, and amortization                            | 160,590.              | 160,158.                            | 432.                                |                                       |  |  |  |  |
| 23       | Insurance  | 63,235.               | 4,515.                              | 54,753.                             | 3,967.                                |  |  |  |  |
| 24       | Other expenses. Itemize expenses not covered   | 22,230                | =,5230                              | = , , , , ,                         | -,,                                   |  |  |  |  |
|          | above. (List miscellaneous expenses in line 24e. If line                                     |                       |                                     |                                     |                                       |  |  |  |  |
|          | 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule 0.) |                       |                                     |                                     |                                       |  |  |  |  |
| а        | BAD DEBT EXPENSE   | 1,886,883.            |                                     |                                     |                                       |  |  |  |  |
| b        | MISSION EXP  | 1,078,212.            | 1,078,212.                          |                                     |                                       |  |  |  |  |
| С        | FOOD & BEVERAGE  | 355,114.              | 355,114.                            |                                     |                                       |  |  |  |  |
| d        |  |                       |                                     |                                     |                                       |  |  |  |  |
| е        | All other expenses   | 929,212.              | 215,416.                            | 73,218.                             | 640,578.                              |  |  |  |  |
| 25       | Total functional expenses. Add lines 1 through 24e   | 26,697,304.           | 24,337,260.                         | 1,234,116.                          | 1,125,928.                            |  |  |  |  |
| 26       | <b>Joint costs.</b> Complete this line only if the organization                              |                       |                                     |                                     |                                       |  |  |  |  |
|          | reported in column (B) joint costs from a combined   |                       |                                     |                                     |                                       |  |  |  |  |
|          | educational campaign and fundraising solicitation.   |                       |                                     |                                     |                                       |  |  |  |  |
|          | Check here if following SOP 98-2 (ASC 958-720)   |                       |                                     |                                     | Earm <b>990</b> (2017)                |  |  |  |  |
|          |  |                       |                                     |                                     |                                       |  |  |  |  |

# Form 990 (2017) Part X Balance Sheet

| Pa            | τλ  | Balance Sneet   |                   |     |             |
|---------------|-----|---|-------------------|-----|-------------|
|               |     | Check if Schedule O contains a response or note to any line in this Part X                  |                   |     |             |
|               |     |   | (A)               |     | (B)         |
|               |     |   | Beginning of year |     | End of year |
|               | 1   | Cash - non-interest-bearing   | 1,820,451.        | 1   | 3,297,977.  |
|               | 2   | Savings and temporary cash investments  | 1,832,462.        | 2   | 2,186,848.  |
|               | 3   | Pledges and grants receivable, net  | 5,575,247.        | 3   | 3,870,323.  |
|               | 4   | Accounts receivable, net  | 3,527.            | 4   | 5,490.      |
|               | 5   | Loans and other receivables from current and former officers, directors,                    |                   |     |             |
|               |     | trustees, key employees, and highest compensated employees. Complete                        |                   |     |             |
|               |     | Part II of Schedule L   |                   | 5   |             |
|               | 6   | Loans and other receivables from other disqualified persons (as defined under               |                   |     |             |
|               |     | section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing           |                   |     |             |
|               |     | employers and sponsoring organizations of section 501(c)(9) voluntary                       |                   |     |             |
| ţ             |     | employees' beneficiary organizations (see instr). Complete Part II of Sch L $_{\dots\dots}$ |                   | 6   |             |
| Assets        | 7   | Notes and loans receivable, net   |                   | 7   |             |
| ⋖             | 8   | Inventories for sale or use   | 3,421,294.        | 8   | 4,894,083.  |
|               | 9   | Prepaid expenses and deferred charges   | 89,164.           | 9   | 182,233.    |
|               | 10a | Land, buildings, and equipment: cost or other   |                   |     |             |
|               |     | basis. Complete Part VI of Schedule D 10a 1,736,935.  |                   |     |             |
|               | b   | Less: accumulated depreciation 10b 792,388.   | 895,710.          | 10c | 944,547.    |
|               | 11  | Investments - publicly traded securities  |                   | 11  |             |
|               | 12  | Investments - other securities. See Part IV, line 11  | 576,589.          | 12  | 576,589.    |
|               | 13  | Investments - program-related. See Part IV, line 11   |                   | 13  |             |
|               | 14  | Intangible assets   | 100 000           | 14  | 05.565      |
|               | 15  | Other assets. See Part IV, line 11  | 123,377.          | 15  | 25,565.     |
|               | 16  | Total assets. Add lines 1 through 15 (must equal line 34)                                   | 14,337,821.       | 16  | 15,983,655. |
|               | 17  | Accounts payable and accrued expenses   | 489,613.          | 17  | 1,385,266.  |
|               | 18  | Grants payable  | 426,147.          | 18  | 99,229.     |
|               | 19  | Deferred revenue  |                   | 19  |             |
|               | 20  | Tax-exempt bond liabilities   |                   | 20  |             |
|               | 21  | Escrow or custodial account liability. Complete Part IV of Schedule D                       |                   | 21  |             |
| ies           | 22  | Loans and other payables to current and former officers, directors, trustees,               |                   |     |             |
| Liabilities   |     | key employees, highest compensated employees, and disqualified persons.                     |                   |     |             |
| <u>ia</u>     |     | Complete Part II of Schedule L  |                   | 22  |             |
| _             | 23  | Secured mortgages and notes payable to unrelated third parties                              |                   | 23  |             |
|               | 24  | Unsecured notes and loans payable to unrelated third parties                                |                   | 24  |             |
|               | 25  | Other liabilities (including federal income tax, payables to related third                  |                   |     |             |
|               |     | parties, and other liabilities not included on lines 17-24). Complete Part X of             |                   |     |             |
|               |     | Schedule D  | 915,760.          | 25  | 1 /0/ /05   |
|               | 26  | Total liabilities. Add lines 17 through 25  | 915,700.          | 26  | 1,484,495.  |
|               |     | Organizations that follow SFAS 117 (ASC 958), check here ▶ X and                            |                   |     |             |
| ces           | 07  | complete lines 27 through 29, and lines 33 and 34.  | 7,837,266.        | 07  | 10,619,288. |
| Fund Balances | 27  | Unrestricted net assets   | 5,584,795.        | 27  | 3,879,872.  |
| Ba            | 28  | Temporarily restricted net assets   | 3,30±,133.        | 28  | 3,073,072.  |
| pur           | 29  | Permanently restricted net assets   |                   | 29  |             |
| Ĩ.            |     | Organizations that do not follow SFAS 117 (ASC 958), check here                             |                   |     |             |
| Si<br>Q       | 20  | and complete lines 30 through 34.   |                   | 20  |             |
| set           | 30  | Capital stock or trust principal, or current funds  |                   | 30  |             |
| Net Assets or | 31  | Paid-in or capital surplus, or land, building, or equipment fund                            |                   | 31  |             |
| Ne.           | 32  | Retained earnings, endowment, accumulated income, or other funds                            | 13,422,061.       | 32  | 14,499,160. |
| -             | 33  | Total liabilities and not seed for the delegates  | 14,337,821.       | 33  | 15,983,655. |
|               | 34  | Total liabilities and net assets/fund balances  | 17,JJ1,UZI•       | 34  | 13,303,033. |

| Pa                                   | rt XI Reconciliation of Net Assets   |                 |                               |                   |                   |
|--------------------------------------|--|-----------------|-------------------------------|-------------------|-------------------|
|                                      | Check if Schedule O contains a response or note to any line in this Part XI  | <u></u>         |                               |                   |                   |
| 1<br>2<br>3<br>4<br>5<br>6<br>7<br>8 | Total revenue (must equal Part VIII, column (A), line 12)  Total expenses (must equal Part IX, column (A), line 25)  Revenue less expenses. Subtract line 2 from line 1  Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))  Net unrealized gains (losses) on investments  Donated services and use of facilities  Investment expenses  | 1 2 3 4 5 6 7 8 | 27,55<br>26,69<br>85<br>13,42 | 5,2<br>7,3<br>7,9 | 04.<br>88.<br>61. |
| 9                                    | Prior period adjustments Other changes in net assets or fund balances (explain in Schedule O)  | 9               |                               |                   | 0.                |
| 10                                   | Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B))  rt XII Financial Statements and Reporting  | 10              | 14,49                         | 9,1               |                   |
|                                      | Check if Schedule O contains a response or note to any line in this Part XII   |                 |                               |                   |                   |
| 1                                    | Accounting method used to prepare the Form 990: Cash X Accrual Other  If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule   |                 | - 2a                          | Yes               | No                |
|                                      | Were the organization's financial statements compiled or reviewed by an independent accountant?  If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both:  Separate basis  Consolidated basis  Both consolidated and separate basis   |                 |                               |                   | Х                 |
|                                      | Were the organization's financial statements audited by an independent accountant?  If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separat consolidated basis, or both:  X Separate basis  Consolidated basis  Both consolidated and separate basis  If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the | e basis,        | 2b                            | Х                 |                   |
|                                      | review, or compilation of its financial statements and selection of an independent accountant?   |                 | 2c                            | Х                 |                   |
| За                                   | If the organization changed either its oversight process or selection process during the tax year, explain in School As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Sir   | edule O.        |                               |                   |                   |
|                                      | Act and OMB Circular A-133?  |                 | За                            |                   | X                 |
| b                                    | If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audits, explain why in Schedule O and describe any steps taken to undergo such audits  |                 | 3b                            |                   |                   |

Form **990** (2017)

#### **SCHEDULE A**

(Form 990 or 990-EZ)

Department of the Treasury Internal Revenue Service

10

Name of the organization

### **Public Charity Status and Public Support**

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

► Attach to Form 990 or Form 990-EZ.

► Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

Open to Public Inspection

Employer identification number

STARKEY HEARING FOUNDATION

| Part | Reason for Public Charity Status (All organizations must complete this part.) See instructions.

The organization is not a private foundation because it is: (For lines 1 through 12, check only one box.)

| A church, convention of churches, or association of churches described in section 170(b)(1)(A)(i).

| A school described in section 170(b)(1)(A)(ii). (Attach Schedule E (Form 990 or 990-EZ).)

A hospital or a cooperative hospital service organization described in section 170(b)(1)(A)(iii).

A medical research organization operated in conjunction with a hospital described in section 170(b)(1)(A)(iii). Enter the hospital's name, city, and state:

An organization operated for the benefit of a college or university owned or operated by a governmental unit described in

A federal, state, or local government or governmental unit described in section 170(b)(1)(A)(v).

7 X An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in section 170(b)(1)(A)(vi). (Complete Part II.)

8 A community trust described in section 170(b)(1)(A)(vi). (Complete Part II.)

section 170(b)(1)(A)(iv). (Complete Part II.)

An agricultural research organization described in **section 170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university:

An organization that normally receives: (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions - subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975. See section 509(a)(2). (Complete Part III.)

11 An organization organized and operated exclusively to test for public safety. See section 509(a)(4).

An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2). See section 509(a)(3). Check the box in lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.

Type I. A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization. You must complete Part IV, Sections A and B.

Type II. A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s). You must complete Part IV, Sections A and C.

Type III functionally integrated. A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions). You must complete Part IV, Sections A, D, and E.

Type III non-functionally integrated. A supporting organization operated in connection with its supported organization(s) that is not functionally integrated. The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions). You must complete Part IV, Sections A and D, and Part V.

Check this box if the organization received a written determination from the IRS that it is a Type I, Type III functionally integrated, or Type III non-functionally integrated supporting organization.

f Enter the number of supported organizations

g Provide the following information about the supported organization(s). (iv) Is the organization listed (i) Name of supported (ii) EIN (iii) Type of organization (v) Amount of monetary (vi) Amount of other ì your governing document? (described on lines 1-10 organization support (see instructions) support (see instructions) Yes No above (see instructions)) Total

Part II Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

| Sec   | tion A. Public Support                       |           |                   |             |           |           |           |
|---|--|-----------|-------------------|-------------|-----------|-----------|-----------|
| Cale  | ndar year (or fiscal year beginning in) 🕨    | (a) 2013  | <b>(b)</b> 2014   | (c) 2015    | (d) 2016  | (e) 2017  | (f) Total |
| 1   | Gifts, grants, contributions, and            |           |                   |             |           |           |           |
|   | membership fees received. (Do not            |           |                   |             |           |           |           |
|   | include any "unusual grants.")               | 32700993. | 36722975.         | 26824708.   | 20395263. | 24595209. | 141239148 |
| 2   | Tax revenues levied for the organ-           |           |                   |             |           |           |           |
|   | ization's benefit and either paid to         |           |                   |             |           |           |           |
|   | or expended on its behalf                    |           |                   |             |           |           |           |
| 3   | The value of services or facilities          |           |                   |             |           |           |           |
|   | furnished by a governmental unit to          |           |                   |             |           |           |           |
|   | the organization without charge              |           |                   |             |           |           |           |
| 4   | Total. Add lines 1 through 3                 | 32700993. | 36722975 <b>.</b> | 26824708.   | 20395263. | 24595209. | 141239148 |
| 5   | The portion of total contributions           |           |                   |             |           |           |           |
|   | by each person (other than a                 |           |                   |             |           |           |           |
|   | governmental unit or publicly                |           |                   |             |           |           |           |
|   | supported organization) included             |           |                   |             |           |           |           |
|   | on line 1 that exceeds 2% of the             |           |                   |             |           |           |           |
|   | amount shown on line 11,                     |           |                   |             |           |           |           |
|   | column (f)                                   |           |                   |             |           |           | 85857484. |
|   | Public support. Subtract line 5 from line 4. |           |                   |             |           |           | 55381664. |
|   | tion B. Total Support                        | ,         |                   |             |           |           |           |
|   | ndar year (or fiscal year beginning in) 🕨    | (a) 2013  | <b>(b)</b> 2014   | (c) 2015    | (d) 2016  | (e) 2017  | (f) Total |
| 7   | Amounts from line 4                          | 32700993. | 36/229/5.         | 26824708.   | 20395263. | 24595209. | 141239148 |
| 8   | Gross income from interest,                  |           |                   |             |           |           |           |
|   | dividends, payments received on              |           |                   |             |           |           |           |
|   | securities loans, rents, royalties,          | 110       | 01 600            | 42 445      | 26 504    | 64 005    | 166 245   |
|   | and income from similar sources              | 112.      | 21,699.           | 43,147.     | 36,584.   | 64,805.   | 166,347.  |
| 9   | Net income from unrelated business           |           |                   |             |           |           |           |
|   | activities, whether or not the               |           |                   |             |           |           |           |
|   | business is regularly carried on             |           |                   |             |           |           |           |
| 10  | Other income. Do not include gain            |           |                   |             |           |           |           |
|   | or loss from the sale of capital             | E01 400   |                   |             |           |           | 581,423.  |
|   | assets (Explain in Part VI.)                 | 581,423.  |                   |             |           |           | 141986918 |
|   | <b>Total support.</b> Add lines 7 through 10 |           | `                 |             |           | 40 0      | ,603,553. |
|   | Gross receipts from related activities       |           | ,                 |             |           |           | ,003,333. |
| 13  | First five years. If the Form 990 is fo      | •         |                   |             | •         | . , . ,   | . □       |
| organization, check this box and stop here  Section C. Computation of Public Support Percentage |  |           |                   |             |           |           |           |
|   | Public support percentage for 2017 (         |           |                   | column (f)\ |           | 14        | 39.00 %   |
|   | Public support percentage from 2016          |           |                   |             |           | 15        | 37.48 %   |
|   | 33 1/3% support test - 2017. If the          |           |                   |             |           |           |           |
| 100   | <b>stop here.</b> The organization qualifies | -         |                   |             |           |           |           |
| h   | 33 1/3% support test - 2016. If the          |           |                   |             |           |           |           |
|   | and <b>stop here.</b> The organization qual  | -         |                   |             |           |           |           |
| 17a   | 10% -facts-and-circumstances tes             |           |                   |             |           |           |           |
| . <i>, u</i>  | and if the organization meets the "fac       |           |                   |             |           |           |           |
|   | meets the "facts-and-circumstances"          |           |                   |             |           |           |           |
| h   | 10% -facts-and-circumstances tes             |           |                   |             |           |           |           |
| -   | more, and if the organization meets the      | -         |                   |             |           |           |           |
|   | organization meets the "facts-and-cire       |           | •                 |             |           |           |           |
| 18  | Private foundation. If the organization      |           |                   |             |           |           |           |

### Part III | Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 10 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

| Se   | ction A. Public Support  |                      |                       |                                   |                       |                     |           |
|--|--|----------------------|-----------------------|-----------------------------------|-----------------------|---------------------|-----------|
| Cale   | ndar year (or fiscal year beginning in)  | (a) 2013             | <b>(b)</b> 2014       | (c) 2015                          | (d) 2016              | (e) 2017            | (f) Total |
| 1  | Gifts, grants, contributions, and  |                      |                       |                                   |                       |                     |           |
|  | membership fees received. (Do not  |                      |                       |                                   |                       |                     |           |
|  | include any "unusual grants.")   |                      |                       |                                   |                       |                     |           |
| 2  | Gross receipts from admissions,  |                      |                       |                                   |                       |                     |           |
|  | merchandise sold or services per-  |                      |                       |                                   |                       |                     |           |
|  | formed, or facilities furnished in   |                      |                       |                                   |                       |                     |           |
|  | any activity that is related to the organization's tax-exempt purpose                |                      |                       |                                   |                       |                     |           |
| 3  | Gross receipts from activities that  |                      |                       |                                   |                       |                     |           |
|  | are not an unrelated trade or bus-   |                      |                       |                                   |                       |                     |           |
|  | iness under section 513  |                      |                       |                                   |                       |                     |           |
| 4  | Tax revenues levied for the organ-   |                      |                       |                                   |                       |                     |           |
| 7  | ization's benefit and either paid to   |                      |                       |                                   |                       |                     |           |
|  | or expended on its behalf  |                      |                       |                                   |                       |                     |           |
| _  | The value of services or facilities  |                      |                       |                                   |                       |                     |           |
| 3  |  |                      |                       |                                   |                       |                     |           |
|  | furnished by a governmental unit to  |                      |                       |                                   |                       |                     |           |
| _  | the organization without charge  |                      |                       |                                   |                       |                     |           |
|  | Total. Add lines 1 through 5   |                      |                       |                                   |                       |                     |           |
| 78   | Amounts included on lines 1, 2, and  |                      |                       |                                   |                       |                     |           |
|  | 3 received from disqualified persons   |                      |                       |                                   |                       |                     |           |
| r  | Amounts included on lines 2 and 3 received from other than disqualified persons that |                      |                       |                                   |                       |                     |           |
|  | exceed the greater of \$5,000 or 1% of the   |                      |                       |                                   |                       |                     |           |
|  | amount on line 13 for the year   |                      |                       |                                   |                       |                     |           |
|  | Add lines 7a and 7b  |                      |                       |                                   |                       |                     |           |
|  | Public support. (Subtract line 7c from line 6.)                                      |                      |                       |                                   |                       |                     |           |
|  | ction B. Total Support   |                      | 1                     |                                   |                       |                     |           |
|  | ndar year (or fiscal year beginning in) 🕨  | (a) 2013             | <b>(b)</b> 2014       | (c) 2015                          | (d) 2016              | (e) 2017            | (f) Total |
|  | Amounts from line 6  |                      |                       |                                   |                       |                     |           |
| 10a  | Gross income from interest, dividends, payments received on                          |                      |                       |                                   |                       |                     |           |
|  | securities loans, rents, royalties,  |                      |                       |                                   |                       |                     |           |
|  | and income from similar sources  |                      |                       |                                   |                       |                     |           |
| k  | Unrelated business taxable income  |                      |                       |                                   |                       |                     |           |
|  | (less section 511 taxes) from businesses   |                      |                       |                                   |                       |                     |           |
|  | acquired after June 30, 1975   |                      |                       |                                   |                       |                     |           |
| c  | Add lines 10a and 10b  |                      |                       |                                   |                       |                     |           |
| 11   | Net income from unrelated business   |                      |                       |                                   |                       |                     |           |
|  | activities not included in line 10b, whether or not the business is                  |                      |                       |                                   |                       |                     |           |
|  | regularly carried on   |                      |                       |                                   |                       |                     |           |
| 12   | Other income. Do not include gain  |                      |                       |                                   |                       |                     |           |
|  | or loss from the sale of capital assets (Explain in Part VI.)                        |                      |                       |                                   |                       |                     |           |
| 13   | Total support. (Add lines 9, 10c, 11, and 12.)                                       |                      |                       |                                   |                       |                     |           |
|  | First five years. If the Form 990 is for   | r the organization's | s first, second, thir | d, fourth, or fifth ta            | ax year as a sectio   | n 501(c)(3) organiz | zation,   |
|  |  |                      |                       |                                   | •                     |                     |           |
| Se   | ction C. Computation of Publ   | ic Support Pe        | rcentage              |                                   |                       |                     | Í         |
|  |  |                      |                       | column (f))                       |                       | 15                  | %         |
| <ul><li>Public support percentage for 2017 (line 8, column (f) divided by line 13, column (f))</li><li>Public support percentage from 2016 Schedule A, Part III, line 15</li></ul> |  |                      |                       |                                   |                       | 16                  | %         |
|  | ction D. Computation of Inve   |                      |                       |                                   |                       | •                   |           |
|  | Investment income percentage for 20  |                      |                       | ne 13. column (f))                |                       | 17                  | %         |
| 18   | Investment income percentage from  |                      |                       |                                   |                       | 18                  | %         |
|  | 33 1/3% support tests - 2017. If the   |                      |                       |                                   |                       |                     |           |
| .56  | more than 33 1/3%, check this box a  |                      |                       |                                   |                       |                     | <b>▶</b>  |
| ŀ  | 33 1/3% support tests - 2016. If the   |                      |                       |                                   |                       |                     | <br>and   |
|  | line 18 is not more than 33 1/3%, che  |                      |                       |                                   |                       |                     |           |
| 20   | Private foundation. If the organization  |                      |                       |                                   |                       |                     |           |
| 20   | i invale roundation. Il the organization   | an alla not bliech a | DOA OH III IC 14, 19  | a, or roo, ori <del>c</del> ck li | ווט טטא מווע שכל וווג | JUNIOUS             |           |

### Part IV | Supporting Organizations

(Complete only if you checked a box in line 12 on Part I. If you checked 12a of Part I, complete Sections A and B. If you checked 12b of Part I, complete Sections A and C. If you checked 12c of Part I, complete Sections A, D, and E. If you checked 12d of Part I, complete Sections A and D, and complete Part V.)

#### Section A. All Supporting Organizations

- 1 Are all of the organization's supported organizations listed by name in the organization's governing documents? If "No," describe in Part VI how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.
- 2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? If "Yes," explain in **Part VI** how the organization determined that the supported organization was described in section 509(a)(1) or (2).
- **3a** Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If "Yes," answer (b) and (c) below.
- **b** Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? If "Yes," describe in **Part VI** when and how the organization made the determination.
- c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? If "Yes," explain in Part VI what controls the organization put in place to ensure such use.
- **4a** Was any supported organization not organized in the United States ("foreign supported organization")? *If* "Yes," and if you checked 12a or 12b in Part I, answer (b) and (c) below.
- **b** Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? If "Yes," describe in **Part VI** how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.
- c Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.
- 5a Did the organization add, substitute, or remove any supported organizations during the tax year? If "Yes," answer (b) and (c) below (if applicable). Also, provide detail in Part VI, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed; (ii) the reasons for each such action; (iii) the authority under the organization's organizing document authorizing such action; and (iv) how the action was accomplished (such as by amendment to the organizing document).
- **b** Type I or Type II only. Was any added or substituted supported organization part of a class already designated in the organization's organizing document?
- c Substitutions only. Was the substitution the result of an event beyond the organization's control?
- 6 Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? If "Yes," provide detail in Part VI.
- 7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).
- 8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ).
- **9a** Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? If "Yes," provide detail in **Part VI.**
- **b** Did one or more disqualified persons (as defined in line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? *If* "Yes," *provide detail in* **Part VI.**
- c Did a disqualified person (as defined in line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? If "Yes," provide detail in Part VI.
- 10a Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? If "Yes," answer 10b below.
  - **b** Did the organization have any excess business holdings in the tax year? (Use Schedule C, Form 4720, to determine whether the organization had excess business holdings.)

|             | Yes           | No   |
|-------------|---------------|------|
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| 3с          |               |      |
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| 4b          |               |      |
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| 5a          |               |      |
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| 5b          |               |      |
| 5c          |               |      |
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| 10a         |               |      |
| 10b         |               |      |
| m 990 or 99 | 90-E <i>7</i> | 2017 |
|             |               |      |

| Pai        | t IV   Supporting Organizations <sub>(continued)</sub>  |         |     |     |
|------------|---|---------|-----|-----|
|            |   |         | Yes | No  |
| 11         | Has the organization accepted a gift or contribution from any of the following persons?   |         |     |     |
| а          | A person who directly or indirectly controls, either alone or together with persons described in (b) and (c)                    |         |     |     |
|            | below, the governing body of a supported organization?  | 11a     |     |     |
| b          | A family member of a person described in (a) above?   | 11b     |     |     |
| С          | A 35% controlled entity of a person described in (a) or (b) above? If "Yes" to a, b, or c, provide detail in Part VI.           | 11c     |     |     |
|            | tion B. Type I Supporting Organizations   |         |     |     |
|            |   |         | Yes | No  |
| 1          | Did the directors, trustees, or membership of one or more supported organizations have the power to                             |         |     |     |
|            | regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the              |         |     |     |
|            | tax year? If "No," describe in Part VI how the supported organization(s) effectively operated, supervised, or                   |         |     |     |
|            | controlled the organization's activities. If the organization had more than one supported organization,                         |         |     |     |
|            | describe how the powers to appoint and/or remove directors or trustees were allocated among the supported                       |         |     |     |
|            | organizations and what conditions or restrictions, if any, applied to such powers during the tax year.                          | 1       |     |     |
| 2          | Did the organization operate for the benefit of any supported organization other than the supported                             |         |     |     |
|            | organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in                      |         |     |     |
|            | Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated,                     |         |     |     |
|            | supervised, or controlled the supporting organization.  | 2       |     |     |
| Sec        | tion C. Type II Supporting Organizations  |         |     |     |
|            |   |         | Yes | No  |
| 1          | Were a majority of the organization's directors or trustees during the tax year also a majority of the directors                |         |     |     |
|            | or trustees of each of the organization's supported organization(s)? If "No," describe in Part VI how control                   |         |     |     |
|            | or management of the supporting organization was vested in the same persons that controlled or managed                          |         |     |     |
|            | the supported organization(s).  | 1       |     |     |
| <u>Sec</u> | tion D. All Type III Supporting Organizations   |         |     |     |
|            | _   |         | Yes | No  |
| 1          | Did the organization provide to each of its supported organizations, by the last day of the fifth month of the                  |         |     |     |
|            | organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax           |         |     |     |
|            | year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the          |         |     |     |
| _          | organization's governing documents in effect on the date of notification, to the extent not previously provided?                | 1       |     |     |
| 2          | Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported                |         |     |     |
|            | organization(s) or (ii) serving on the governing body of a supported organization? If "No," explain in Part VI how              | _       |     |     |
| _          | the organization maintained a close and continuous working relationship with the supported organization(s).                     | 2       |     |     |
| 3          | By reason of the relationship described in (2), did the organization's supported organizations have a                           |         |     |     |
|            | significant voice in the organization's investment policies and in directing the use of the organization's                      |         |     |     |
|            | income or assets at all times during the tax year? If "Yes," describe in Part VI the role the organization's                    | _       |     |     |
| 800        | supported organizations played in this regard. tion E. Type III Functionally Integrated Supporting Organizations                | 3       |     |     |
| 1          | Check the box next to the method that the organization used to satisfy the Integral Part Test during the yea(see instructions). |         |     |     |
| ı<br>a     | The organization satisfied the Activities Test. Complete line 2 below.  |         |     |     |
| b          | The organization is the parent of each of its supported organizations. <i>Complete</i> line 3 below.                            |         |     |     |
| C          | The organization supported a governmental entity. Describe in Part VI how you supported a government entity (see instru         | uctions | .)  |     |
| 2          | Activities Test. Answer (a) and (b) below.  |         | Yes | No  |
| a          | Did substantially all of the organization's activities during the tax year directly further the exempt purposes of              |         | 100 | 110 |
| _          | the supported organization(s) to which the organization was responsive? If "Yes," then in Part VI identify                      |         |     |     |
|            | those supported organizations and explain how these activities directly furthered their exempt purposes,                        |         |     |     |
|            | how the organization was responsive to those supported organizations, and how the organization determined                       |         |     |     |
|            | that these activities constituted substantially all of its activities.  | 2a      |     |     |
| b          | Did the activities described in (a) constitute activities that, but for the organization's involvement, one or more             |         |     |     |
|            | of the organization's supported organization(s) would have been engaged in? If "Yes," explain in Part VI the                    |         |     |     |
|            | reasons for the organization's position that its supported organization(s) would have engaged in these                          |         |     |     |
|            | activities but for the organization's involvement.  | 2b      |     |     |
| 3          | Parent of Supported Organizations. Answer (a) and (b) below.  |         |     |     |
| а          | Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or                     |         |     |     |
|            | trustees of each of the supported organizations? Provide details in Part VI.  | 3a      |     |     |
| b          | Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each             |         |     |     |

of its supported organizations? If "Yes," describe in Part VI the role played by the organization in this regard.

| Pa   | rt V Type III Non-Functionally Integrated 509(a)(3) Supportin                   | ig Organ      | izations                   |                                |
|------|---|---------------|----------------------------|--------------------------------|
| 1    | Check here if the organization satisfied the Integral Part Test as a qualifying | g trust on I  | Nov. 20, 1970 (explain in  | Part VI.) See instructions. A  |
|      | other Type III non-functionally integrated supporting organizations must co     | omplete Se    | ctions A through E.        |                                |
| Sect | ion A - Adjusted Net Income   |               | (A) Prior Year             | (B) Current Year<br>(optional) |
| 1    | Net short-term capital gain   | 1             |                            |                                |
| 2    | Recoveries of prior-year distributions  | 2             |                            |                                |
| 3    | Other gross income (see instructions)   | 3             |                            |                                |
| 4    | Add lines 1 through 3   | 4             |                            |                                |
| 5    | Depreciation and depletion  | 5             |                            |                                |
| 6    | Portion of operating expenses paid or incurred for production or                |               |                            |                                |
|      | collection of gross income or for management, conservation, or                  |               |                            |                                |
|      | maintenance of property held for production of income (see instructions)        | 6             |                            |                                |
| 7    | Other expenses (see instructions)   | 7             |                            |                                |
| 8    | Adjusted Net Income (subtract lines 5, 6, and 7 from line 4)                    | 8             |                            |                                |
| Sect | ion B - Minimum Asset Amount  |               | (A) Prior Year             | (B) Current Year<br>(optional) |
| 1    | Aggregate fair market value of all non-exempt-use assets (see                   |               |                            |                                |
|      | instructions for short tax year or assets held for part of year):               |               |                            |                                |
| а    | Average monthly value of securities   | 1a            |                            |                                |
| b    | Average monthly cash balances   | 1b            |                            |                                |
| С    | Fair market value of other non-exempt-use assets                                | 1c            |                            |                                |
| d    | Total (add lines 1a, 1b, and 1c)  | 1d            |                            |                                |
| е    | Discount claimed for blockage or other  |               |                            |                                |
|      | factors (explain in detail in Part VI):   |               |                            |                                |
| 2    | Acquisition indebtedness applicable to non-exempt-use assets                    | 2             |                            |                                |
| 3    | Subtract line 2 from line 1d  | 3             |                            |                                |
| 4    | Cash deemed held for exempt use. Enter 1-1/2% of line 3 (for greater amount,    |               |                            |                                |
|      | see instructions)   | 4             |                            |                                |
| 5    | Net value of non-exempt-use assets (subtract line 4 from line 3)                | 5             |                            |                                |
| 6    | Multiply line 5 by .035   | 6             |                            |                                |
| 7    | Recoveries of prior-year distributions  | 7             |                            |                                |
| 8    | Minimum Asset Amount (add line 7 to line 6)                                     | 8             |                            |                                |
| Sect | ion C - Distributable Amount  |               |                            | Current Year                   |
| 1    | Adjusted net income for prior year (from Section A, line 8, Column A)           | 1             |                            |                                |
| 2    | Enter 85% of line 1   | 2             |                            |                                |
| 3    | Minimum asset amount for prior year (from Section B, line 8, Column A)          | 3             |                            |                                |
| 4    | Enter greater of line 2 or line 3   | 4             |                            |                                |
| 5    | Income tax imposed in prior year  | 5             |                            |                                |
| 6    | Distributable Amount. Subtract line 5 from line 4, unless subject to            |               |                            |                                |
|      | emergency temporary reduction (see instructions)                                | 6             |                            |                                |
| 7    | Check here if the current year is the organization's first as a non-functiona   | lly integrate | ed Type III supporting org | anization (see                 |
|      | instructions)   |               |                            |                                |

Schedule A (Form 990 or 990-EZ) 2017

| ı aı  | Type iii Non-Functionally integrated 509                             | (a)(s) Supporting Orga        | anizations (continued)                 |   |
|-------|--|-------------------------------|--|---|
| Secti | on D - Distributions   |                               |  | Current Year                              |
| 1     | Amounts paid to supported organizations to accomplish exe            |                               |  |   |
| 2     | Amounts paid to perform activity that directly furthers exemp        |                               |  |   |
|       | organizations, in excess of income from activity                     |                               |  |   |
| 3     | Administrative expenses paid to accomplish exempt purpose            | es of supported organization  | IS                                     |   |
| 4     | Amounts paid to acquire exempt-use assets                            |                               |  |   |
| 5     | Qualified set-aside amounts (prior IRS approval required)            |                               |  |   |
| 6     | Other distributions (describe in <b>Part VI</b> ). See instructions. |                               |  |   |
| 7     | Total annual distributions. Add lines 1 through 6.                   |                               |  |   |
| 8     | Distributions to attentive supported organizations to which the      | ne organization is responsive | e                                      |   |
|       | (provide details in Part VI). See instructions.                      |                               |  |   |
| 9     | Distributable amount for 2017 from Section C, line 6                 |                               |  |   |
| 10    | Line 8 amount divided by line 9 amount                               |                               |  |   |
| Secti | on E - Distribution Allocations (see instructions)                   | (i)<br>Excess Distributions   | (ii)<br>Underdistributions<br>Pre-2017 | (iii)<br>Distributable<br>Amount for 2017 |
| 1     | Distributable amount for 2017 from Section C, line 6                 |                               |  |   |
| 2     | Underdistributions, if any, for years prior to 2017 (reason-         |                               |  |   |
|       | able cause required- explain in Part VI). See instructions.          |                               |  |   |
| 3     | Excess distributions carryover, if any, to 2017                      |                               |  |   |
| а     |  |                               |  |   |
| b     | From 2013  |                               |  |   |
| С     | From 2014  |                               |  |   |
| d     | From 2015  |                               |  |   |
| е     | From 2016  |                               |  |   |
| f     | Total of lines 3a through e  |                               |  |   |
| g     | Applied to underdistributions of prior years                         |                               |  |   |
| h     | Applied to 2017 distributable amount                                 |                               |  |   |
| i     | Carryover from 2012 not applied (see instructions)                   |                               |  |   |
| j     | Remainder. Subtract lines 3g, 3h, and 3i from 3f.                    |                               |  |   |
| 4     | Distributions for 2017 from Section D,                               |                               |  |   |
|       | line 7: \$   |                               |  |   |
| а     | Applied to underdistributions of prior years                         |                               |  |   |
| b     | Applied to 2017 distributable amount                                 |                               |  |   |
| С     | Remainder. Subtract lines 4a and 4b from 4.                          |                               |  |   |
| 5     | Remaining underdistributions for years prior to 2017, if             |                               |  |   |
|       | any. Subtract lines 3g and 4a from line 2. For result greater        |                               |  |   |
|       | than zero, explain in Part VI. See instructions.                     |                               |  |   |
| 6     | Remaining underdistributions for 2017. Subtract lines 3h             |                               |  |   |
|       | and 4b from line 1. For result greater than zero, explain in         |                               |  |   |
|       | Part VI. See instructions.   |                               |  |   |
| 7     | Excess distributions carryover to 2018. Add lines 3j                 |                               |  |   |
|       | and 4c.  |                               |  |   |
| 8     | Breakdown of line 7:   |                               |  |   |
| а     | Excess from 2013   |                               |  |   |
| b     | Excess from 2014   |                               |  |   |
| С     | Excess from 2015   |                               |  |   |
| d     | Excess from 2016   |                               |  |   |
| е     | Excess from 2017   |                               |  |   |

Schedule A (Form 990 or 990-EZ) 2017

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.
 Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

Name of the organization

**Employer identification number** 

STARKEY HEARING FOUNDATION

36-3297852

| Organiza  | ation type (check or  | ne):   |  |  |  |  |  |
|-----------|---|--|--|--|--|--|--|
| Filers of | :   | Section:   |  |  |  |  |  |
| Form 990  | 0 or 990-EZ   | $\boxed{\textbf{X}}$ 501(c)( $3$ ) (enter number) organization   |  |  |  |  |  |
|           |   | 4947(a)(1) nonexempt charitable trust <b>not</b> 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   |  |  |  |  |  |
|           |   |  |  |  |  |  |  |
|           |   | 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.   |  |  |  |  |  |
| General   | Rule  |  |  |  |  |  |  |
|           | -   | 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   | Rules   |  |  |  |  |  |  |
| X         | For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% 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 <b>General Rule</b> applies to this organization because it received nonexclusively religious, charitable, etc., contributions totaling \$5,000 or more during the year   \$\sum_{\text{sum}}\$ |  |  |  |  |  |  |
| but it mu | 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 990-PF, Part I, line 2, to certify that it doesn't meet the 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 STARKEY HEARING FOUNDATION 36-3297852

| Part I     | Contributors (see instructions). Use duplicate copies of Part I if additional | al space is needed.        |  |
|------------|---|----------------------------|--|
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c)<br>Total contributions | (d)<br>Type of contribution  |
| 1          |   | \$ <u>14,593,252.</u>      | Person X Payroll X Noncash X (Complete Part II for noncash contributions.) |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c)<br>Total contributions | (d)<br>Type of contribution  |
| 2          |   | \$3,242,552.               | Person X Payroll   |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c)<br>Total contributions | (d)<br>Type of contribution  |
|            |   | \$                         | Person Payroll Noncash (Complete Part II for noncash contributions.)       |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c)<br>Total contributions | (d)<br>Type of contribution  |
|            |   | \$                         | Person Payroll Noncash (Complete Part II for noncash contributions.)       |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c)<br>Total contributions | (d)<br>Type of contribution  |
|            |   | \$                         | Person Payroll Noncash (Complete Part II for noncash contributions.)       |
| (a)<br>No. | (b)<br>Name, address, and ZIP + 4   | (c)<br>Total contributions | (d)<br>Type of contribution  |
|            |   | \$                         | Person Payroll Noncash (Complete Part II for                               |

### STARKEY HEARING FOUNDATION

36-3297852

| Part II                      | Noncash Property (see instructions). Use duplicate copies of Part II if a | additional space is needed.                     |                      |
|------------------------------|---|---|----------------------|
| (a)<br>No.<br>from<br>Part I | (b)  Description of noncash property given                                | (c)<br>FMV (or estimate)<br>(See instructions.) | (d)<br>Date received |
| 1                            | SUPPLIES/FOOD & BEVERAGE/HEARING AIDS & ACCESSORIES                       |   |                      |
|                              |   | \$ <u>14,326,079</u> .                          | 12/20/17             |
| (a)<br>No.<br>from<br>Part I | (b) Description of noncash property given                                 | (c)<br>FMV (or estimate)<br>(See instructions.) | (d)<br>Date received |
| 2                            | HEARING AID BATTERIES   |   |                      |
|                              |   | \$\$  | 12/20/17             |
| (a)<br>No.<br>from<br>Part I | (b)<br>Description of noncash property given                              | (c) FMV (or estimate) (See instructions.)       | (d)<br>Date received |
|                              |   |   |                      |
|                              |   | \$  |                      |
| (a)<br>No.<br>from<br>Part I | (b) Description of noncash property given                                 | (c)<br>FMV (or estimate)<br>(See instructions.) | (d)<br>Date received |
|                              |   |   |                      |
|                              |   | \$  |                      |
| (a)<br>No.<br>from<br>Part I | (b)  Description of noncash property given                                | (c)<br>FMV (or estimate)<br>(See instructions.) | (d)<br>Date received |
|                              |   |   |                      |
|                              |   | \$  |                      |
| (a)<br>No.<br>from<br>Part I | (b)  Description of noncash property given                                | (c)<br>FMV (or estimate)<br>(See instructions.) | (d)<br>Date received |
|                              |   |   |                      |
|                              |   | \$  |                      |

Name of organization Employer identification number 36-3297852 STARKEY HEARING FOUNDATION Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for Part III 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 info. once.) 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 (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (a) No. from (b) Purpose of gift (c) Use of gift (d) Description of how gift is held Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (a) No. from Part I (b) Purpose of gift (c) Use of gift (d) Description of how gift is held (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (a) No. from (b) Purpose of gift (c) Use of gift (d) Description of how gift is held Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee

### **SCHEDULE D**

(Form 990)

Department of the Treasury Internal Revenue Service

Supplemental Financial Statements

▶ Complete if the organization answered "Yes" on Form 990,
Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.

▶ Attach to Form 990.

▶ Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047 Open to Public Inspection

Name of the organization

STARKEY HEARING FOUNDATION

**Employer identification number** 36-3297852

| Pa | rt I Organizations Maintaining Donor Advise                        | d Funds or Other Similar Fund              | s or Accounts. Complete if the                 |
|----|--|--|--|
|    | organization answered "Yes" on Form 990, Part IV, line             | e 6.                                       |  |
|    |  | (a) Donor advised funds                    | (b) Funds and other accounts                   |
| 1  | Total number at end of year  |  |  |
| 2  | Aggregate value of contributions to (during year)                  |  |  |
| 3  | Aggregate value of grants from (during year)                       |  |  |
| 4  | Aggregate value at end of year                                     |  |  |
| 5  | Did the organization inform all donors and donor advisors in v     | vriting that the assets held in donor adv  | sed funds                                      |
|    | are the organization's property, subject to the organization's     | -  |  |
| 6  | Did the organization inform all grantees, donors, and donor ad     |  |  |
|    | for charitable purposes and not for the benefit of the donor or    |  |  |
|    | impermissible private benefit?                                     |  | Yes No   |
| Pa |  |  |  |
| 1  | Purpose(s) of conservation easements held by the organization      | on (check all that apply).                 |  |
|    | Preservation of land for public use (e.g., recreation or e         | ducation) Preservation of a his            | torically important land area                  |
|    | Protection of natural habitat                                      | Preservation of a ce                       | tified historic structure                      |
|    | Preservation of open space   |  |  |
| 2  | Complete lines 2a through 2d if the organization held a qualifi    | ied conservation contribution in the forn  | n of a conservation easement on the last       |
|    | day of the tax year.   |  | Held at the End of the Tax Year                |
| а  | Total number of conservation easements                             |  | 2a   |
| b  |  |  |  |
| С  | Number of conservation easements on a certified historic stru      | ucture included in (a)                     | 2c   |
| d  | Number of conservation easements included in (c) acquired a        | after 7/25/06, and not on a historic struc | ture   |
|    | listed in the National Register                                    |  | 2d   |
| 3  | Number of conservation easements modified, transferred, rele       |  |  |
|    | year ▶   |  |  |
| 4  | Number of states where property subject to conservation eas        | sement is located                          |  |
| 5  | Does the organization have a written policy regarding the peri     | iodic monitoring, inspection, handling of  | <u></u>  |
|    | violations, and enforcement of the conservation easements it       | holds?                                     | Yes  |
| 6  | Staff and volunteer hours devoted to monitoring, inspecting,       |  |  |
|    | <b>&gt;</b>  |  |  |
| 7  | Amount of expenses incurred in monitoring, inspecting, hand        | ling of violations, and enforcing conserv  | ation easements during the year                |
|    | <b>▶</b> \$  |  |  |
| 8  | Does each conservation easement reported on line 2(d) above        | e satisfy the requirements of section 17   | O(h)(4)(B)(i)                                  |
|    | and section 170(h)(4)(B)(ii)?                                      |  | Yes  |
| 9  | In Part XIII, describe how the organization reports conservation   | on easements in its revenue and expens     | e statement, and balance sheet, and            |
|    | include, if applicable, the text of the footnote to the organizat  | ion's financial statements that describes  | s the organization's accounting for            |
| _  | conservation easements.  |  |  |
| Pa | rt III Organizations Maintaining Collections of                    |  | Other Similar Assets.                          |
|    | Complete if the organization answered "Yes" on Form                |  |  |
| 1a | If the organization elected, as permitted under SFAS 116 (AS       |  |  |
|    | historical treasures, or other similar assets held for public exh  | ibition, education, or research in further | ance of public service, provide, in Part XIII, |
|    | the text of the footnote to its financial statements that describ  |  |  |
| b  | If the organization elected, as permitted under SFAS 116 (AS       |  |  |
|    | treasures, or other similar assets held for public exhibition, ed  | lucation, or research in furtherance of p  | ublic service, provide the following amounts   |
|    | relating to these items:   |  |  |
|    | (i) Revenue included on Form 990, Part VIII, line 1                |  |  |
|    | (ii) Assets included in Form 990, Part X                           |  | · · · · · · · · · · · · · · · · · · ·          |
| 2  | If the organization received or held works of art, historical trea |  | al gain, provide                               |
|    | the following amounts required to be reported under SFAS 1         | , ,  |  |
| а  | Revenue included on Form 990, Part VIII, line 1                    |  | <b>&gt;</b> \$                                 |
| b  | Assets included in Form 990, Part X                                |  | <b>▶</b> \$                                    |

| Par  | rt III Organizations Maintainin  | g Coll      | ections of A                    | rt, His    | torical Tr       | easures, c          | or Othe      | r Similar            | Asse               | <b>ts</b> (contii | nued)   |      |
|------|--|-------------|---------------------------------|------------|------------------|---------------------|--------------|----------------------|--------------------|-------------------|---------|------|
| 3    | Using the organization's acquisition, acc                                      | ession,     | and other record                | ds, chec   | k any of the     | following that      | t are a sig  | nificant use         | e of its           | collectio         | n iten  | ns   |
|      | (check all that apply):  |             |                                 |            |                  |                     |              |                      |                    |                   |         |      |
| а    | Public exhibition  |             | d                               |            | Loan or exc      | hange progra        | ıms          |                      |                    |                   |         |      |
| b    | Scholarly research   |             | е                               |            | Other            |                     |              |                      |                    |                   |         |      |
| С    | Preservation for future generations  | i           |                                 |            |                  |                     |              |                      |                    |                   |         |      |
| 4    | Provide a description of the organization                                      | 's collec   | tions and explai                | in how th  | ney further t    | he organization     | on's exem    | npt purpose          | in Parl            | t XIII.           |         |      |
| 5    | During the year, did the organization solid                                    | cit or red  | ceive donations                 | of art, hi | istorical trea   | sures, or othe      | er similar a | assets               |                    | _                 |         | _    |
|      | to be sold to raise funds rather than to be                                    | e mainta    | ained as part of                | the orga   | nization's co    | ollection?          |              |                      | $\square$          | Yes               |         | ☐ No |
| Par  | rt IV Escrow and Custodial Ari   | angei       | <b>ments.</b> Comple            | ete if the | e organizatio    | n answered "        | 'Yes" on F   | orm 990, F           | Part IV,           | line 9, o         | r       |      |
|      | reported an amount on Form 990,  | Part X,     | line 21.                        |            |                  |                     |              |                      |                    |                   |         |      |
| 1a   | Is the organization an agent, trustee, cus                                     | todian o    | or other intermed               | diary for  | contribution     | ns or other as      | sets not i   | ncluded              |                    | _                 | _       | _    |
|      | on Form 990, Part X?   |             |                                 |            |                  |                     |              |                      | L                  | Yes               |         | ∟ No |
| b    | If "Yes," explain the arrangement in Part                                      | XIII and    | complete the fo                 | llowing    | table:           |                     |              |                      |                    |                   |         |      |
|      |  |             |                                 |            |                  |                     |              |                      |                    | Amoun             | t       |      |
| С    | Beginning balance  |             |                                 |            |                  |                     |              | 1c                   |                    |                   |         |      |
| d    | Additions during the year  |             |                                 |            |                  |                     |              | 1d                   |                    |                   |         |      |
| е    | Distributions during the year  |             |                                 |            |                  |                     |              | 1e                   |                    |                   |         |      |
| f    | Ending balance   |             |                                 |            |                  |                     |              | 1f                   |                    |                   |         | _    |
| 2a   | Did the organization include an amount of                                      | n Form      | 990, Part X, line               | 21, for    | escrow or co     | ustodial acco       | unt liabilit | y?                   | L                  | Yes               | L       | _ No |
|      | If "Yes," explain the arrangement in Part                                      |             |                                 |            |                  |                     |              |                      |                    |                   |         |      |
| Par  | rt V Endowment Funds. Comple   | ete if the  | e organization ar               | swered     | "Yes" on Fo      | 1                   |              |                      |                    |                   |         |      |
|      |  |             | ) Current year                  | (b) P      | rior year        | (c) Two year        | s back (     | <b>d)</b> Three year | 's back            | <b>(e)</b> Fou    | r years | back |
| 1a   | 0 0 ,  |             |                                 |            |                  |                     |              |                      |                    |                   |         |      |
| b    | Contributions  |             |                                 |            |                  |                     |              |                      |                    |                   |         |      |
| С    | Net investment earnings, gains, and loss                                       |             |                                 |            |                  |                     |              |                      |                    |                   |         |      |
| d    | Grants or scholarships   |             |                                 |            |                  |                     |              |                      |                    |                   |         |      |
| е    | Other expenditures for facilities  |             |                                 |            |                  |                     |              |                      |                    |                   |         |      |
|      | and programs   |             |                                 |            |                  |                     |              |                      |                    |                   |         |      |
| f    | Administrative expenses  |             |                                 |            |                  |                     |              |                      |                    |                   |         |      |
| g    | •  |             |                                 |            |                  |                     |              |                      |                    |                   |         |      |
| 2    | Provide the estimated percentage of the  |             | year end balanc                 | ce (line 1 | g, column (a     | a)) held as:        |              |                      |                    |                   |         |      |
| а    | ,  | <b>&gt;</b> |                                 | _%         |                  |                     |              |                      |                    |                   |         |      |
| b    | Permanent endowment  |             | _%                              |            |                  |                     |              |                      |                    |                   |         |      |
| С    | · · · · · · · · · · · · · · · · · · ·  |             | %                               |            |                  |                     |              |                      |                    |                   |         |      |
|      | The percentages on lines 2a, 2b, and 2c  |             |                                 |            |                  |                     |              |                      |                    |                   |         |      |
| 3a   | Are there endowment funds not in the po  | ossessic    | on of the organiz               | ation tha  | at are held a    | ınd administe       | red for the  | e organizat          | ion                | 1                 |         |      |
|      | by:  |             |                                 |            |                  |                     |              |                      |                    |                   | Yes     | No   |
|      | (i) unrelated organizations  |             |                                 |            |                  |                     |              |                      |                    | 3a(i)             |         |      |
|      |  |             |                                 |            |                  |                     |              |                      |                    |                   |         |      |
| b    | If "Yes" on line 3a(ii), are the related orga                                  |             |                                 |            |                  | ·                   |              |                      |                    | 3b                |         |      |
| Do:  | Describe in Part XIII the intended uses of<br>irt VI Land, Buildings, and Equi |             |                                 | owment     | funds.           |                     |              |                      |                    |                   |         |      |
| Fai  |  | -           |                                 | 0 0-4 1    | / line dda (     | Coo Forms 000       | Ded V.       | : 10                 |                    |                   |         |      |
|      | Complete if the organization answ  | erea "Y     |                                 |            | ı                |                     |              |                      | -1                 | <b></b>           |         |      |
|      | Description of property  |             | (a) Cost or o<br>basis (investr |            | , , ,            | or other<br>(other) |              | cumulated reciation  |                    | ( <b>d</b> ) Boo  | k valu  | ie   |
| _    |  |             | Dasis (IIIVesti                 | nent)      |                  | 3,939.              | depi         | eciation             |                    | 11                | 3 0     | 39.  |
|      | Land   |             |                                 |            |                  | 3,633.              |              | 22,815               |                    |                   |         | 18.  |
|      | •  |             |                                 |            |                  | ,,,,,,,,,           |              | 22,013               | ′•                 | JΙ                | 0,0     | 10.  |
|      | Leasehold improvements   |             |                                 |            | 92               | 1,150.              | 7            | 69,573               | <del>.   -</del>   | 15                | 1 5     | 77.  |
|      |  |             |                                 |            |                  | 8,213.              |              | 0,010                | <del>' •</del>   - |                   |         | 13.  |
|      | Other  |             | l Form OOO Dow                  | V colu     |                  |                     |              |                      | +                  |                   |         | 47.  |
| rota | ar. Aud iiries Ta through Te. (Column (d) mu                                   | sı equa     | rronn 990, Part                 | ∧, colur   | ıııı (¤), iine i | 100.)               |              |                      | <del>-   -  </del> | D/Farm            | _       |      |

| Schedule D (Form 990) 2017 STARKEY HEA                               | RING FOUNDATI              | ON 36-3297852 <sub>Page</sub>                             |
|--|----------------------------|---|
| Part VII Investments - Other Securities.                             |                            |   |
| Complete if the organization answered "Yes"                          | on Form 990, Part IV, line | 11b. See Form 990, Part X, line 12.                       |
| (a) Description of security or category (including name of security) | (b) Book value             | (c) Method of valuation: Cost or end-of-year market value |
| (1) Financial derivatives  |                            |   |
| (2) Closely-held equity interests                                    |                            |   |
| (3) Other  |                            |   |
| (A)  |                            |   |
| (B)  |                            |   |
| (C)  |                            |   |
| (D)  |                            |   |
| (E)  |                            |   |
| (F)  |                            |   |
| (G)  |                            |   |
| (H)  |                            |   |
| Total. (Col. (b) must equal Form 990, Part X, col. (B) line 12.)     |                            |   |
| Part VIII Investments - Program Related.                             |                            |   |
| Complete if the organization answered "Yes"                          |                            |   |
| (a) Description of investment  | (b) Book value             | (c) Method of valuation: Cost or end-of-year market value |
| (1)  |                            |   |
| (2)  |                            |   |
| (3)  |                            |   |
| (4)  |                            |   |
| (5)  |                            |   |
| (6)  |                            |   |
| (7)  |                            |   |
| (8)  |                            |   |
| (9)  |                            |   |
| Total. (Col. (b) must equal Form 990, Part X, col. (B) line 13.)     |                            |   |
| Part IX Other Assets.  |                            |   |
| Complete if the organization answered "Yes"                          | on Form 990, Part IV, line | 11d. See Form 990, Part X, line 15.                       |

| (a) Description   | (b) Book value |
|---|----------------|
| (1)   |                |
| (2)   |                |
| (3)   |                |
| (4)   |                |
| (5)   |                |
| (6)   |                |
| (7)   |                |
| (8)   |                |
| (9)   |                |
| Total (Column (b) must equal Form 990, Part X, col. (B) line 15.) |                |

### Part X Other Liabilities.

Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

| 1.     | (a) Description of liability                                | (b) Book value |
|--------|---|----------------|
| (1)    | Federal income taxes  |                |
| (2)    |   |                |
| (3)    |   |                |
| (4)    |   |                |
| (5)    |   |                |
| (6)    |   |                |
| (7)    |   |                |
| (8)    |   |                |
| (9)    |   |                |
| Total. | (Column (b) must equal Form 990, Part X, col. (B) line 25.) |                |

<sup>2.</sup> Liability for uncertain tax positions. In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48 (ASC 740). Check here if the text of the footnote has been provided in Part XIII X

| Sched       | dule D (Form 990) 2017 STARKEY HEARING FOUNDATION  |          |                   | 36-                                     | 3297852 Page 4        |
|-------------|--|----------|-------------------|---|-----------------------|
| Part        | Reconciliation of Revenue per Audited Financial Statemer                                       | nts W    | ith Revenue per F | Retur                                   | n.                    |
|             | Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.                    |          |                   |   |                       |
| 1           | Total revenue, gains, and other support per audited financial statements                       |          |                   | 1                                       | 45,936,781.           |
|             | Amounts included on line 1 but not on Form 990, Part VIII, line 12:                            |          |                   |   |                       |
| а           | Net unrealized gains (losses) on investments   | 2a       | 219,111.          |   |                       |
| b           | Donated services and use of facilities   | 2b       | 17,869,465.       | <u>.</u>                                |                       |
| С           | Recoveries of prior year grants  | 2c       |                   | _                                       |                       |
| d           | Other (Describe in Part XIII.)   | 2d       | 292,913.          | 4                                       | 10 001 100            |
|             | Add lines 2a through 2d  |          |                   | 2e                                      | 18,381,489.           |
| 3           | Subtract line <b>2e</b> from line <b>1</b>   |          |                   | 3                                       | 27,555,292.           |
| 4           | Amounts included on Form 990, Part VIII, line 12, but not on line 1:                           |          | 1                 |   |                       |
|             | Investment expenses not included on Form 990, Part VIII, line 7b                               | 4a       |                   | 4                                       |                       |
| b           | Other (Describe in Part XIII.)   | 4b       |                   | _                                       |                       |
|             | Add lines 4a and 4b  |          |                   | 4c                                      | 0.                    |
|             | Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.)                |          |                   | 5                                       | 27,555,292.           |
| Par         | Reconciliation of Expenses per Audited Financial Stateme                                       | nts \    | With Expenses per | Retu                                    | ırn.                  |
|             | Complete if the organization answered "Yes" on Form 990, Part IV, line 12a.                    |          |                   | _                                       | 144 050 600           |
|             | Total expenses and losses per audited financial statements                                     |          |                   | 1                                       | 44,859,682.           |
|             | Amounts included on line 1 but not on Form 990, Part IX, line 25:                              | ı        | 1 17 060 465      |   |                       |
|             | Donated services and use of facilities   |          | 17,869,465.       | 4                                       |                       |
|             | Prior year adjustments   | 2b       |                   | 4                                       |                       |
|             | Other losses   | 2c       | 202 012           | 4                                       |                       |
|             | Other (Describe in Part XIII.)   | 2d       | 292,913.          | _                                       | 10 160 270            |
|             | Add lines 2a through 2d  |          |                   | 2e                                      | 18,162,378.           |
|             | Subtract line <b>2e</b> from line <b>1</b>   |          |                   | 3                                       | 26,697,304.           |
|             | Amounts included on Form 990, Part IX, line 25, but not on line 1:                             | Ι.       | ı                 |   |                       |
|             | Investment expenses not included on Form 990, Part VIII, line 7b                               | 4a       |                   | _                                       |                       |
|             | Other (Describe in Part XIII.)   | 4b       |                   | 4                                       | _                     |
|             | Add lines 4a and 4b  |          |                   | 4c                                      | 0.                    |
|             | Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18.)               |          |                   | 5                                       | 26,697,304.           |
|             | t XIII Supplemental Information.   |          |                   |   |                       |
|             | te the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV |          |                   | 4; Par                                  | t X, line 2; Part XI, |
| lines 2     | 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any addit         | ionai ir | ntormation.       |   |                       |
|             |  |          |                   |   |                       |
| PAR         | T X, LINE 2:   |          |                   |   |                       |
| 1 7110      | 1 A, DIND 2.   |          |                   |   |                       |
| ςπа         | RKEY HEARING FOUNDATION HAS REVIEWED ITS T   | XΔ       | POSTTIONS FO      | )R A                                    | I.I. OPEN TAX         |
| <u> </u>    | MINI HERMING I COMPRISION MID REVIEWED IID I   | 7 17 1   | TODITIOND TO      | ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,, | DD OIDN IIM           |
| YEA         | RS AND HAS CONCLUDED THAT NO MATERIAL LIAB   | тт.т     | TTES EXIST A      | AS O                                    | F DECEMBER            |
|             | NO THE THE CONCLOSED THAT NO MITERIAL BIRD   |          | TIED EMIDI 1      | 10 0                                    | I DECEMBER            |
| 31.         | 2017 AND 2016. GENERALLY, STARKEY HEARING  | FO       | UNDATTON IS       | NO                                      | LONGER                |
| <del></del> |  |          | 01(2111101( 12    |   |                       |
| SUB         | JECT TO INCOME TAX EXAMINATIONS BY THE U.S   | . F      | EDERAL. STAT      | re o                                    | R LOCAL TAX           |
|             | <u> </u>   |          |                   |   |                       |
| AUT         | HORITIES FOR YEARS PRIOR TO THE FISCAL YEA   | R E      | NDED DECEMBE      | ER 3                                    | 1. 2014.              |
|             |  |          |                   |   | _,                    |
|             |  |          |                   |   |                       |
|             |  |          |                   |   |                       |
| PAR         | T XI, LINE 2D - OTHER ADJUSTMENTS:   |          |                   |   |                       |
|             |  |          |                   |   |                       |
| FUN         | DRAISING EXPENSE, RECLASSIFIED TO REVENUE  |          |                   |   | 292,913.              |
|             | ,  |          |                   |   | ,                     |
|             |  |          |                   |   |                       |
|             |  |          |                   |   |                       |
| PAR         | T XII, LINE 2D - OTHER ADJUSTMENTS:  |          |                   |   |                       |
|             |  |          |                   |   |                       |

292,913.

FUNDRAISING EXPENSE, RECLASSIFIED TO REVENUE

| Schedule D (Form 990) 2017                           | STARKEY HEARING FOUNDATION              | 36-3297852 Page 5 |
|--|---|-------------------|
| Schedule D (Form 990) 2017  Part XIII   Supplemental | Information (continued)                 |                   |
| 2 24 1   | (************************************** |                   |
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# SCHEDULE F (Form 990)

Department of the Treasury Internal Revenue Service

### **Statement of Activities Outside the United States**

► Complete if the organization answered "Yes" on Form 990, Part IV, line 14b, 15, or 16.

Attach to Form 990.

► Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047 Open to Public Inspection

Name of the organization

Employer identification number

| STARKE | EY HEARING    | FOUNDATION  | 36-3297852                 |   |
|--------|---------------|---|----------------------------|---|
| Part I | General Infor | nation on Activities Outside the United States. Complete if the organ | nization answered "Yes" or | n |

36-3297852

|       | Form 990, Part IV             | /, line 14b.       |                              |   |                                   |                           |
|-------|-------------------------------|--------------------|------------------------------|---|-----------------------------------|---------------------------|
| 1     | For grantmakers. Does         | the organization   | n maintain recor             | ds to substantiate the amount of its gra  | ants and other assistance,        |                           |
|       | the grantees' eligibility for | or the grants or a | assistance, and              | the selection criteria used to award the  | e grants or assistance?           | Yes No                    |
|       |                               | _                  |                              |   | -                                 |                           |
| 2     | For grantmakers. Desc         | ribe in Part V the | organization's               | procedures for monitoring the use of it   | s grants and other assistance out | side the                  |
|       | United States.                |                    | J                            | ·   | 3                                 |                           |
| 3     |                               | ne following Part  | I. line 3 table ca           | an be duplicated if additional space is i | needed.)                          |                           |
|       | (a) Region                    | (b) Number of      | (c) Number of                | (d) Activities conducted in the region    | (e) If activity listed in (d)     | (f) Total                 |
|       | (a) Hogion                    | offices            | `employees,                  | (by type) (such as, fundraising, pro-     | is a program service,             | expenditures              |
|       |                               | in the region      |                              | gram services, investments, grants to     | . •                               | for and                   |
|       |                               |                    | contractors<br>in the region | recipients located in the region)         | of service(s) in the region       | investments in the region |
|       |                               |                    | in the region                |   |                                   |                           |
|       |                               |                    |                              |   |                                   |                           |
| CEN   | TRAL AMERICA AND              |                    |                              |   |                                   |                           |
|       | CARIBBEAN                     |                    | 12                           | PROGRAM SERVICES                          | HEARING MISSIONS                  | 1,076,067.                |
| 11115 | CARIBBEAN                     |                    | 12                           | ROGRAM BERVICES                           | HEARING MISSIONS                  | 1,070,007.                |
|       |                               |                    |                              |   |                                   |                           |
|       |                               |                    |                              |   |                                   |                           |
| EUR   | ODE                           |                    | 0                            | DDOGDAM GEDYLGEG                          | HEADING MIGGIONG                  | 130 660                   |
| LUK   | JPE                           |                    | 0                            | PROGRAM SERVICES                          | HEARING MISSIONS                  | 139,660.                  |
|       |                               |                    |                              |   |                                   |                           |
|       |                               |                    |                              |   |                                   |                           |
|       | r Asia and the                |                    |                              | L   | L                                 |                           |
| PAC:  | IFIC                          |                    | 29                           | PROGRAM SERVICES                          | HEARING MISSIONS                  | 1,902,048.                |
|       |                               |                    |                              |   |                                   |                           |
|       |                               |                    |                              |   |                                   |                           |
|       |                               |                    |                              |   |                                   |                           |
| MID   | DLE EAST                      |                    | 2                            | PROGRAM SERVICES                          | HEARING MISSIONS                  | 253,039.                  |
|       |                               |                    |                              |   |                                   |                           |
|       |                               |                    |                              |   |                                   |                           |
|       |                               |                    |                              |   |                                   |                           |
| NOR!  | TH AMERICA                    |                    | 0                            | PROGRAM SERVICES                          | HEARING MISSIONS                  | 665,321.                  |
|       |                               |                    |                              |   |                                   |                           |
|       |                               |                    |                              |   |                                   |                           |
|       |                               |                    |                              |   |                                   |                           |
| SOU'  | TH AMERICA                    |                    | 2                            | PROGRAM SERVICES                          | HEARING MISSIONS                  | 428,935.                  |
|       |                               |                    |                              |   |                                   |                           |
|       |                               |                    |                              |   |                                   |                           |
|       |                               |                    |                              |   |                                   |                           |
| SOU   | TH ASIA                       |                    | 0                            | PROGRAM SERVICES                          | HEARING MISSIONS                  | 738,211.                  |
|       |                               |                    |                              |   |                                   |                           |
|       |                               |                    |                              |   |                                   |                           |
|       |                               |                    |                              |   |                                   |                           |
| SUB   | -SAHARAN AFRICA               | 2                  | 68                           | PROGRAM SERVICES                          | HEARING MISSIONS                  | 4,140,713.                |
| 3 a   | Sub-total                     | 2                  | 113                          |   |                                   | 9,343,994.                |
|       | Total from continuation       |                    |                              |   |                                   | ,                         |
|       | sheets to Part I              | 0                  | 0                            |   |                                   | 0.                        |
| c     | Totals (add lines 3a          |                    |                              |   |                                   |                           |
| •     | and 3b)                       | 2                  | 113                          |   |                                   | 9,343,994.                |
| ΙНΔ   | For Paperwork Reduct          | ion Act Notice     | soo the Instruc              | tions for Form 990                        | Schodulo E                        | (Form 990) 2017           |

| Part II Grants and Oth     |  |  |                      |                          |                                 |                                  |   |   |  |
|----------------------------|--|--|----------------------|--------------------------|---------------------------------|----------------------------------|---|---|--|
| recipient who re           | recipient who received more than \$5,000. Part II can be duplicated if additional space is needed. |  |                      |                          |                                 |                                  |   |   |  |
| 1 (a) Name of organization | <b>(b)</b> IRS code section and EIN (if applicable)  |  | (d) Purpose of grant | (e) Amount of cash grant | (f) Manner of cash disbursement | (g) Amount of noncash assistance | (h) Description<br>of noncash<br>assistance | (i) Method of<br>valuation (book, FMV,<br>appraisal, other) |  |
|                            |  |  |                      |                          |                                 |                                  |   |   |  |
|                            |  |  |                      |                          |                                 |                                  |   |   |  |
|                            |  |  |                      |                          |                                 |                                  |   |   |  |
|                            |  |  |                      |                          |                                 |                                  |   |   |  |
|                            |  |  |                      |                          |                                 |                                  |   |   |  |
|                            |  |  |                      |                          |                                 |                                  |   |   |  |
|                            |  |  |                      |                          |                                 |                                  |   |   |  |

| 2 | Enter total number of recipient organizations listed above that are recognized as charities by the foreign country, recognized as tax-exempt |              |  |
|---|--|--------------|--|
|   | by the IRS, or for which the grantee or counsel has provided a section 501(c)(3) equivalency letter  | ightharpoons |  |
| 3 | Enter total number of other organizations or entities  |              |  |

Schedule F (Form 990) 2017

Part III Grants and Other Assistance to Individuals Outside the United States. Complete if the organization answered "Yes" on Form 990, Part IV, line 16.

| (a) Type of grant or assistance | (b) Region              | (c) Number of recipients | (d) Amount of cash grant | (e) Manner of cash disbursement | (f) Amount of noncash assistance | (g) Description of noncash assistance | (h) Method of<br>valuation<br>(book, FMV,<br>appraisal, other) |
|---------------------------------|-------------------------|--------------------------|--------------------------|---------------------------------|----------------------------------|---------------------------------------|--|
|                                 |                         |                          |                          |                                 |                                  |                                       |  |
|                                 | CENTRAL AMERICA         |                          |                          |                                 |                                  |                                       |  |
| HEARING AIDS                    | AND THE CARIBBEAN       | 9,842                    | 0.                       |                                 | 501,190.                         | HEARING AIDS                          | FMV  |
|                                 |                         |                          |                          |                                 |                                  |                                       |  |
|                                 | EAST ASIA AND THE       |                          |                          |                                 | 4050404                          |                                       | L  |
| HEARING AIDS                    | PACIFIC                 | 20,444                   | 0.                       |                                 | 1050431.                         | HEARING AIDS                          | FMV  |
|                                 |                         |                          |                          |                                 |                                  |                                       |  |
|                                 | MIDDLE EAST AND         | 0 101                    |                          |                                 | 111 770                          |                                       |  |
| HEARING AIDS                    | NORTH AFRICA            | 2,121                    | 0.                       |                                 | 111,772.                         | HEARING AIDS                          | FMV  |
|                                 |                         |                          |                          |                                 |                                  |                                       |  |
| HEARING AIDS                    | NORTH AMERICA           | 9,943                    | 0.                       |                                 | 520,768.                         | HEARING AIDS                          | FMV  |
|                                 |                         |                          |                          |                                 |                                  |                                       |  |
|                                 |                         |                          |                          |                                 |                                  |                                       |  |
| HEARING AIDS                    | SOUTH AMERICA           | 3,094                    | 0.                       |                                 | 160,279.                         | HEARING AIDS                          | FMV  |
|                                 |                         |                          |                          |                                 |                                  |                                       |  |
|                                 |                         |                          |                          |                                 |                                  |                                       |  |
| HEARING AIDS                    | SOUTH ASIA              | 12,958                   | 0.                       |                                 | 670,069.                         | HEARING AIDS                          | FMV  |
|                                 |                         |                          |                          |                                 |                                  |                                       |  |
|                                 | SUB-SAHARAN             | 14 205                   |                          |                                 | FF1 110                          |                                       |  |
| HEARING AIDS                    | AFRICA                  | 14,307                   | 0.                       |                                 | 751,118.                         | HEARING AIDS                          | FMV  |
|                                 |                         |                          |                          |                                 |                                  |                                       |  |
| HEARING AIDS                    | EUROPE                  | 48                       | 0.                       |                                 | 250.                             | HEARING AIDS                          | FMV  |
|                                 |                         |                          |                          |                                 |                                  |                                       |  |
|                                 | RUSSIA &<br>NEIGHBORING |                          |                          |                                 |                                  |                                       |  |
| HEARING AIDS                    | STATES                  | 2,179                    | 0.                       |                                 | 114 340                          | HEARING AIDS                          | FMV  |

| 1 | Was the organization a U.S. transferor of property to a foreign corporation during the tax year? If "Yes," the organization may be required to file Form 926, Return by a U.S. Transferor of Property to a Foreign Corporation (see Instructions for Form 926)  | Yes   | X No |
|---|---|-------|------|
| 2 | Did the organization have an interest in a foreign trust during the tax year? If "Yes," the organization may be required to separately file Form 3520, Annual Return To Report Transactions With Foreign Trusts and Receipt of Certain Foreign Gifts, and/or Form 3520-A, Annual Information Return of Foreign  |       |      |
|   | Trust With a U.S. Owner (see Instructions for Forms 3520 and 3520-A; don't file with Form 990)  | Yes   | X No |
| 3 | Did the organization have an ownership interest in a foreign corporation during the tax year? If "Yes," the organization may be required to file Form 5471, Information Return of U.S. Persons With Respect To Certain Foreign Corporations (see Instructions for Form 5471)  | X Yes | □ No |
| 4 | Was the organization a direct or indirect shareholder of a passive foreign investment company or a qualified electing fund during the tax year? If "Yes," the organization may be required to file Form 8621, Information Return by a Shareholder of a Passive Foreign Investment Company or Qualified Electing Fund (see Instructions for Form 8621) | Yes   | X No |
| 5 | Did the organization have an ownership interest in a foreign partnership during the tax year? If "Yes," the organization may be required to file Form 8865, Return of U.S. Persons With Respect to Certain Foreign Partnerships (see Instructions for Form 8865)  | Yes   | X No |
| 6 | Did the organization have any operations in or related to any boycotting countries during the tax year? If "Yes," the organization may be required to separately file Form 5713, International Boycott Report (see  | Ves   | X No |

Schedule F (Form 990) 2017

#### Schedule F (Form 990) 2017 Part V | Supplemental Information

Provide the information required by Part I, line 2 (monitoring of funds); Part I, line 3, column (f) (accounting method; amounts of investments vs. expenditures per region); Part II, line 1 (accounting method); Part III (accounting method); and Part III, column (c) (estimated number of recipients), as applicable. Also complete this part to provide any additional information. See instructions.

| PART I, LINE 2:   |
|---|
| ALL GRANTS OF HEARING AIDS AND HEALTH CARE SERVICES ARE PROVIDED DIRECTLY |
| TO INDIVIDUALS OUTSIDE THE UNITED STATES BY FOUNDATION EMPLOYEES AND      |
| CONTRACTORS. THE FOUNDATION ALSO PROVIDES THE FOLLOW-UP CARE SERVICES TO  |
| THESE INDIVIDUALS TO ENSURE THAT THEY CONTINUE TO GET THEY GET THE CARE   |
| THEY NEED. THEREFORE, MONITORING THE USE OF THESE GRANTS/ASSISTANCE IS    |
| DONE DIRECTLY THROUGH THE OPERATIONS OF THE FOUNDATION'S PROGRAMS.        |
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#### **SCHEDULE G**

Department of the Treasury

Internal Revenue Service

(Form 990 or 990-EZ)

**Supplemental Information Regarding Fundraising or Gaming Activities** 

Complete if the organization answered "Yes" on Form 990, Part IV, line 17, 18, or 19, or if the organization entered more than \$15,000 on Form 990-EZ, line 6a.

▶ Attach to Form 990 or Form 990-EZ.

► Go to www.irs.gov/Form990 for the latest instructions.

OMB No. 1545-0047

2017

Open to Public Inspection

Name of the organization

STARKEY HEARING FOUNDATION

Employer identification number 36-3297852

Schedule G (Form 990 or 990-EZ) 2017

| D 11111111  | IIIIIIIII I OOIIDIII I O  |  |   |   | 30 3237  | 002   |
|---|---|--|---|---|--|---|
| Part I Fundraising Activities required to complete this par   | Complete if the organization answett.   | ered "Y  | 'es" or   | n Form 990, Part IV,  | line 17. Form 990-E2   | Z filers are not  |
| <ul> <li>Indicate whether the organization rais</li> <li>a X Mail solicitations</li> <li>b X Internet and email solicitations</li> <li>c X Phone solicitations</li> <li>d X In-person solicitations</li> <li>2 a Did the organization have a written of key employees listed in Form 990, P</li> <li>b If "Yes," list the 10 highest paid indiscompensated at least \$5,000 by the</li> </ul> | e X Solicitat f Solicitat g X Special  or oral agreement with any individual  art VII) or entity in connection with p viduals or entities (fundraisers) pursu | tion of<br>tion of<br>fundra<br>(includerofess | non-g<br>gover<br>lising o<br>ding o<br>ional f | overnment grants nment grants events fficers, directors, true fundraising services? | stees, or Yes  |   |
| (i) Name and address of individual or entity (fundraiser)   | (ii) Activity   | fundr<br>have c<br>or con<br>contribu          | aiser<br>ustody<br>trol of                      | (iv) Gross receipts from activity   | (v) Amount paid<br>to (or retained by)<br>fundraiser<br>listed in col. (i) | (vi) Amount paid<br>to (or retained by)<br>organization |
|   |   | Yes  | No  |   |  |   |
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| Salar States in which the organization or licensing.  | on is registered or licensed to solicit o   | contrib  | outions   | s or has been notified  | d it is exempt from re   | egistration   |
| AK, AL, AR, CA, CO, CT, FL,   |   | ME,  | ΜI,   | MS,MN,NC,N  | D,NJ,NH,NM   | ,NY,OH,OK   |
| OR, PA, RI, TN, UT, VA, WA,   | WI,WV   |  |   |   |  |   |
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LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.

Fundraising Events. Complete if the organization answered "Yes" on Form 990, Part IV, line 18, or reported more than \$15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than \$5,000. (a) Event #1 **(b)** Event #2 (c) Other events (d) Total events NONE (add col. (a) through GALA EVENT col. (c)) (event type) (total number) (event type) Revenue 6,144,081. 1 Gross receipts 6,144,081 5,860,278 5,860,278. 2 Less: Contributions 283,803. 283,803. 3 Gross income (line 1 minus line 2) ...... 4 Cash prizes 5 Noncash prizes Direct Expenses 6 Rent/facility costs 263,994. 263,994. 7 Food and beverages ..... 28,919. 28,919. 8 Entertainment 9 Other direct expenses 292,913. 10 Direct expense summary. Add lines 4 through 9 in column (d) -9,110. 11 Net income summary. Subtract line 10 from line 3, column (d) Part III Gaming. Complete if the organization answered "Yes" on Form 990, Part IV, line 19, or reported more than \$15,000 on Form 990-EZ, line 6a. (b) Pull tabs/instant (d) Total gaming (add (a) Bingo (c) Other gaming Revenue bingo/progressive bingo col. (a) through col. (c)) Gross revenue ..... 2 Cash prizes Direct Expenses 3 Noncash prizes 4 Rent/facility costs 5 Other direct expenses ..... Yes Yes % Yes 6 Volunteer labor No 7 Direct expense summary. Add lines 2 through 5 in column (d) 8 Net gaming income summary. Subtract line 7 from line 1, column (d) **9** Enter the state(s) in which the organization conducts gaming activities: a Is the organization licensed to conduct gaming activities in each of these states? No **b** If "No," explain: 10a Were any of the organization's gaming licenses revoked, suspended, or terminated during the tax year? \_\_\_\_\_ Yes \_\_\_\_ No **b** If "Yes," explain:

| Sch | edule G (Form 990 or 990-EZ) 2017 STARKEY HEARING FOUNDATION 36-  | 3297    | 852   | Page 3   |
|-----|---|---------|-------|----------|
|     | Does the organization conduct gaming activities with nonmembers?  |         | Yes   | No       |
|     | Is the organization a grantor, beneficiary or trustee of a trust, or a member of a partnership or other entity formed   |         |       |          |
|     | to administer charitable gaming?  |         | Yes   | ☐ No     |
| 13  | Indicate the percentage of gaming activity conducted in:  |         |       |          |
| a   | The organization's facility   | 13a     |       | %        |
|     | An outside facility   | 13b     |       | %        |
| 14  | Enter the name and address of the person who prepares the organization's gaming/special events books and records:   |         |       |          |
|     | Name  |         |       |          |
|     | Address   |         |       |          |
| 15a | Does the organization have a contract with a third party from whom the organization receives gaming revenue?  | 📖       | Yes   | └─ No    |
| b   | olf "Yes," enter the amount of gaming revenue received by the organization > \$ and the amount  |         |       |          |
|     | of gaming revenue retained by the third party > \$  |         |       |          |
| C   | If "Yes," enter name and address of the third party:  |         |       |          |
|     | Name ▶  |         |       |          |
|     | Address ►   |         |       |          |
|     | Address   |         |       |          |
| 16  | Gaming manager information:   |         |       |          |
|     | Name  |         |       |          |
|     | Gaming manager compensation ▶ \$  |         |       |          |
|     |   |         |       |          |
|     | Description of services provided  |         |       |          |
|     |   |         |       |          |
|     |   |         |       |          |
|     | ☐ Director/officer ☐ Employee ☐ Independent contractor  |         |       |          |
|     |   |         |       |          |
|     | Mandatory distributions:  |         |       |          |
| ā   | solutions is the organization required under state law to make charitable distributions from the gaming proceeds to   |         | Yes   | □ No     |
| h   | retain the state gaming license?  Denter the amount of distributions required under state law to be distributed to other exempt organizations or spent in the | —       |       | 110      |
| _   | organization's own exempt activities during the tax year > \$   |         |       |          |
| Pa  | Supplemental Information. Provide the explanations required by Part I, line 2b, columns (iii) and (v); and Part III,  | lines 9 | 9b, 1 | 0b, 15b, |
|     | 15c, 16, and 17b, as applicable. Also provide any additional information. See instructions.   |         |       |          |
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| Schedule ( | G (Form 990 or 990-EZ)                     | STARKEY        | HEARING | FOUNDATION | 36-3297852 | Page 4 |
|------------|--|----------------|---------|------------|------------|--------|
| Part IV    | G (Form 990 or 990-EZ)  Supplemental Infor | mation (contin | ued)    |            |            |        |
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#### SCHEDULE I (Form 990)

**Grants and Other Assistance to Organizations, Governments, and Individuals in the United States** 

Complete if the organization answered "Yes" on Form 990, Part IV, line 21 or 22.

Attach to Form 990.

► Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047 **2017**Open to Public

Inspection

Name of the organization

Department of the Treasury Internal Revenue Service

Co to www.iis.gov/i oritisso for the latest information

Employer identification number

| STARKEY H  | EAKING FO            | NOT.T.YOM                          |                          |                                   |  |                                       | 36-329/852   |
|--|----------------------|------------------------------------|--------------------------|-----------------------------------|--|---------------------------------------|--|
| Part I General Information on Grants a                     | ınd Assistance       |                                    |                          |                                   |  | <u> </u>                              |  |
| 1 Does the organization maintain records                   | to substantiate th   | e amount of the grants             | s or assistance, the     | grantees' eligibilit              | ty for the grants or as  | sistance, and the selec               | tion   |
| criteria used to award the grants or assis                 | stance?              |                                    |                          |                                   |  |                                       | No   |
| 2 Describe in Part IV the organization's pro               | ocedures for mon     | itoring the use of grant           | t funds in the United    | d States.                         |  |                                       |  |
| Part II Grants and Other Assistance to                     | Domestic Organ       | izations and Domest                | ic Governments. C        | omplete if the org                | anization answered "   | Yes" on Form 990, Part                | IV, line 21, for any                               |
| recipient that received more than                          | \$5,000. Part II ca  | n be duplicated if addi            | tional space is need     | led.                              |  |                                       |  |
| Name and address of organization or government             | (b) EIN              | (c) IRC section<br>(if applicable) | (d) Amount of cash grant | (e) Amount of non-cash assistance | (f) Method of<br>valuation (book,<br>FMV, appraisal,<br>other) | (g) Description of noncash assistance | (h) Purpose of grant<br>or assistance              |
| INTERNATIONAL HEARING FOUNDATION                           |                      |                                    |                          |                                   |  |                                       | ONGOING RESEARCH ON                                |
| 701 25TH AVE. S, #200,                                     | 44 6040400           | 504 (5) (0)                        | 100 000                  |                                   |  |                                       | ETIOLOGY AND TREATMENTS                            |
| MINNEAPOLIS, MN 55454                                      | 41-6042488           | 501(C)(3)                          | 100,000.                 | 0.                                |  |                                       | OF EAR RELATED PROBLEMS.                           |
| WITHING DELAGE & DEVELOPMENT                               |                      |                                    |                          |                                   |  |                                       | OFFERS AN EDUCATIONAL                              |
| WHITAKER PEACE & DEVELOPMENT                               |                      |                                    |                          |                                   |  |                                       | PROGRAM FOR FORMER CHILD                           |
| 1000 N. ALADEDA STREET, SUITE 104<br>LOS ANGELES, CA 90012 | 45-4050957           | 501(C)(3)                          | 75,000.                  | 0.                                |  |                                       | SOLDIERS AND YOUNG PEOPLE AFFECTED BY CONFLICTS IN |
| HOS ANGELES, CA 90012                                      | 43-4030337           | 501(0/(3/                          | 75,000.                  | 0.                                |  |                                       | ECI PARTNERS WITH                                  |
| EASTERN CONGO INITIATIVE                                   |                      |                                    |                          |                                   |  |                                       | THIRTEEN CONGOLESE                                 |
| 3417 FREEMONT AVENUE NORTH                                 |                      |                                    |                          |                                   |  |                                       | ORGANIZATIONS IN THE                               |
| SEATTLE, WA 98103  | 45-4103655           | 501(C)(3)                          | 125,000.                 | 0.                                |  |                                       | FIELDS OF ECONOMIC                                 |
|  |                      |                                    |                          | - •                               |  |                                       | DIRECTLY SUPPORTS THE                              |
| GLOBAL HEALTH CORPS  |                      |                                    |                          |                                   |  |                                       | GLOBAL HEALTH CARE                                 |
| ONE PENN PLAZA SUITE 6271                                  |                      |                                    |                          |                                   |  |                                       | PROGRAMMING AND                                    |
| NEW YORK, NY 10119   | 80-0512336           | 501(C)(3)                          | 150,000.                 | 0.                                |  |                                       | OPERATIONAL NEEDS TO                               |
|  |                      |                                    |                          |                                   |  |                                       |  |
| 2 Enter total number of section 501(c)(3) a                | •                    | •                                  |                          |                                   |  |                                       |  |
| 3 Enter total number of other organization                 | s listed in the line | 1 table                            |                          |                                   |  |                                       | ▶ ∪ •  |

| Part III Grants and Other Assistance to Domestic Individuals Part III can be duplicated if additional space is needed. | . Complete if the        | e organization answe     | ered "Yes" on Form 9                  | 990, Part IV, line 22.                                |                                       |
|--|--------------------------|--------------------------|---------------------------------------|---|---------------------------------------|
| (a) Type of grant or assistance  | (b) Number of recipients | (c) Amount of cash grant | (d) Amount of non-<br>cash assistance | (e) Method of valuation (book, FMV, appraisal, other) | (f) Description of noncash assistance |
|  |                          |                          |                                       |   |                                       |
| HEAR NOW HEARING AIDS  | 6824                     | 0.                       | 10,236,000.                           | FMV   |                                       |
|  |                          | -                        | , , ,                                 |   |                                       |
|  |                          |                          |                                       |   |                                       |
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|  |                          |                          |                                       |   |                                       |
|  |                          |                          |                                       |   |                                       |
|  |                          |                          |                                       |   |                                       |
| Part IV Supplemental Information. Provide the information req  | uired in Part I, lin     | ne 2; Part III, column   | (b); and any other a                  | dditional information.                                |                                       |
| PART I, LINE 2:  |                          |                          |                                       |   |                                       |
| THE FOUNDATION MONITORS THE USE OF   | IMPACT                   | GRANT FUND               | S THROUGH                             | THE GRANTEE'S   |                                       |
| SUBMISSION OF GRANT REPORTS. TWO R   | EPORTS R                 | EQUIRED AR               | E A SUMMAR                            | Y PROGRESS  |                                       |
| REPORT AND A FINAL REPORT. THE SUM   | MARY PRO                 | GRESS REPO               | RT IS DUE                             | 90 DAYS AFTER   |                                       |
| THE GRANT FUNDS ARE RELEASED, AND  | THE FINA                 | L REPORT D               | UE 60 DAYS                            | AFTER THE   |                                       |
| PROGRAM FUNDED HAS BEEN COMPLETED.   | SHOULD                   | THE SUMMAR               | Y PROGRESS                            | REPORTS AND   |                                       |
| FINAL REPORTS BE INCOMPLETE, THE R   | EPORT WI                 | LL BE RETU               | RNED FOR F                            | URTHER  |                                       |
| DEVELOPMENT SHOULD THEY BE FOUND I   | O BE LAC                 | KING SUFFI               | CIENT DATA                            | AND   |                                       |

NARRATIVE INFORMATION. THE FOUNDATION CAN ALSO CONDUCT INFORMAL SPOT-CHECKS

Part IV | Supplemental Information

VIA TELEPHONE OR IN-PERSON VISITS. FOR ORGANIZATIONS WITH INTERNATIONAL

ACTIVITIES, SHF PARTNERS ON THE GROUND HAVE BEEN ABLE TO CONDUCT SITE

VISITS, OR SHF STAFF MEMBERS VISIT THE LOCATIONS WHILE ON TRAVELLING ON

MISSIONS. NO GRANT RECIPIENT MAY APPLY FOR ANOTHER GRANT, IF THE

APPROPRIATE SUMMARY PROGRESS REPORT AND FINAL REPORT HAVE NOT BEEN FILED

WITH THE FOUNDATION.

PART II, LINE 1, COLUMN (H):

NAME OF ORGANIZATION OR GOVERNMENT: WHITAKER PEACE & DEVELOPMENT

(H) PURPOSE OF GRANT OR ASSISTANCE: OFFERS AN EDUCATIONAL PROGRAM FOR

FORMER CHILD SOLDIERS AND YOUNG PEOPLE AFFECTED BY CONFLICTS IN NORTHERN

UGANDA. THIS PROGRAM TRAINS SUCH YOUTHS WITH TECHNIQUES IN VIOLENCE

PREVENTION AND EMPOWERMENT TO HELP THEM TO OVERCOME THE TRAUMA AND

PSYCHOLOGICAL DISTRESS THEY SUFFERED.

NAME OF ORGANIZATION OR GOVERNMENT: EASTERN CONGO INITIATIVE

(H) PURPOSE OF GRANT OR ASSISTANCE: ECI PARTNERS WITH THIRTEEN CONGOLESE

ORGANIZATIONS IN THE FIELDS OF ECONOMIC DEVELOPMENT, EDUCATION AND

MATERNAL AND NEWBORN CHILD HEALTH. THROUGH THIS GRANT, HEALTH AND HEARING

ASSISTANCE WAS PROVIDED TO PEOPLE IN THE REGION.

NAME OF ORGANIZATION OR GOVERNMENT: GLOBAL HEALTH CORPS

(H) PURPOSE OF GRANT OR ASSISTANCE: DIRECTLY SUPPORTS THE GLOBAL HEALTH

CARE PROGRAMMING AND OPERATIONAL NEEDS TO MOBILIZE A GLOBAL COMMUNITY OF

EMERGING LEADERS. FELLOWS PARTICIPATE IN A ONE-YEAR LEADERSHIP AND

DEVELOPMENT TRAINING PROGRAM FOCUSED ON HEALTHCARE ISSUES IN MALAWI,

RWANDA, UGANDA, AND ZAMBIA.

## **SCHEDULE J** (Form 990)

**Compensation Information** 

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 23.

► Attach to Form 990.

► Go to www.irs.gov/Form990 for instructions and the latest information.

OMB No. 1545-0047

Open to Public Inspection

Name of the organization

Part I Questions Regarding Compensation

Department of the Treasury

Internal Revenue Service

STARKEY HEARING FOUNDATION

Employer identification number 36-3297852

|        | 0   |     | Yes | N   |
|--------|---|-----|-----|-----|
| a      | Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990,    |     |     |     |
|        | Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items.                |     |     |     |
|        | First-class or charter travel  Housing allowance or residence for personal use  |     |     |     |
|        | Travel for companions Payments for business use of personal residence   |     |     |     |
|        | Tax indemnification and gross-up payments  Health or social club dues or initiation fees                                  |     |     |     |
|        | Discretionary spending account  Personal services (such as, maid, chauffeur, chef)  |     |     |     |
| )      | If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or             |     |     |     |
|        | reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain                  | 1b  |     |     |
|        | Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors,          |     |     |     |
|        | trustees, and officers, including the CEO/Executive Director, regarding the items checked on line 1a?                     | 2   |     |     |
|        | Indicate which, if any, of the following the filing organization used to establish the compensation of the organization's |     |     |     |
|        | CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to        |     |     |     |
|        | establish compensation of the CEO/Executive Director, but explain in Part III.  |     |     |     |
|        | Compensation committee Written employment contract  |     |     |     |
|        | Independent compensation consultant Compensation survey or study  |     |     |     |
|        | Form 990 of other organizations  Approval by the board or compensation committee  |     |     |     |
|        |   |     |     |     |
|        | During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing              |     |     |     |
|        | organization or a related organization:   |     |     |     |
| a      | Receive a severance payment or change-of-control payment?   | 4a  |     | 2   |
| 2      |   |     |     | 7   |
|        | Participate in, or receive payment from, an equity-based compensation arrangement?  |     |     | 7   |
|        | If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.             |     |     |     |
|        | Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.                                  |     |     |     |
|        | For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation         |     |     |     |
|        | contingent on the revenues of:  |     |     |     |
| 3      | The organization?   | 5a  |     | 2   |
| _<br>> | Any related organization?   | 5b  |     | 7   |
| •      | If "Yes" on line 5a or 5b, describe in Part III.  | 0.0 |     |     |
|        | For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation         |     |     |     |
|        | contingent on the net earnings of:  |     |     |     |
|        | The organization?   | 6a  |     | 2   |
| 1      | Any related organization?   | 6b  |     |     |
| ,      | If "Yes" on line 6a or 6b, describe in Part III.  | OB  |     | H   |
|        | For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments          |     |     |     |
|        | TO DETAULA HALEGOULT OF FOR THE ABOUT EAR AIL AIL OCCUPITE. HILE TO MIN THE POLITICATION DIOVIDE ALLA HOLLIKEN DAVIDENTS  |     |     | 2   |
|        |   | 7   |     | . 4 |
|        | not described on lines 5 and 6? If "Yes," describe in Part III  | 7   |     |     |
|        | not described on lines 5 and 6? If "Yes," describe in Part III  |     |     | Ţ   |
|        | not described on lines 5 and 6? If "Yes," describe in Part III  |     |     | 2   |

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule J (Form 990) 2017

Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees. Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported on Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions, on row (ii). Do not list any individuals that aren't listed on Form 990, Part VII.

Note: The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual.

|                         |             | (B) Breakdown of         | W-2 and/or 1099-MI                        | SC compensation                           | (C) Retirement and other deferred benefits |         | (E) Total of columns<br>(B)(i)-(D) | (F) Compensation in column (B)            |
|-------------------------|-------------|--------------------------|---|---|--|---------|------------------------------------|---|
| (A) Name and Title      |             | (i) Base<br>compensation | (ii) Bonus &<br>incentive<br>compensation | (iii) Other<br>reportable<br>compensation | compensation                               | Denents | (15)(1)-(15)                       | reported as deferred<br>on prior Form 990 |
| (1) BRUCE SCHMALTZ      | (i)         | 166,100.                 | 0.  | 0.  | 0.   | 20,909. | 187,009.                           | 0.  |
| CHIEF FINANCIAL OFFICER | (ii)        | 0.                       | 0.  | 0.  | 0.   | 0.      | 0.                                 | 0.  |
|                         | (i)         |                          |   |   |  |         |                                    |   |
|                         | (ii)        |                          |   |   |  |         |                                    |   |
|                         | (i)         |                          |   |   |  |         |                                    |   |
|                         | (ii)        |                          |   |   |  |         |                                    |   |
|                         | (i)         |                          |   |   |  |         |                                    |   |
|                         | (ii)        |                          |   |   |  |         |                                    |   |
|                         | (i)         |                          |   |   |  |         |                                    |   |
|                         | (ii)        |                          |   |   |  |         |                                    |   |
|                         | (i)         |                          |   |   |  |         |                                    |   |
|                         | (ii)        |                          |   |   |  |         |                                    |   |
|                         | (i)         |                          |   |   |  |         |                                    |   |
|                         | (ii)<br>(i) |                          |   |   |  |         |                                    |   |
|                         | (ii)        |                          |   |   |  |         |                                    |   |
|                         | (i)         |                          |   |   |  |         |                                    |   |
|                         | (ii)        |                          |   |   |  |         |                                    |   |
|                         | (i)         |                          |   |   |  |         |                                    |   |
|                         | (ii)        |                          |   |   |  |         |                                    |   |
|                         | (i)         |                          |   |   |  |         |                                    |   |
|                         | (ii)        |                          |   |   |  |         |                                    |   |
|                         | (i)         |                          |   |   |  |         |                                    |   |
|                         | (ii)        |                          |   |   |  |         |                                    |   |
|                         | (i)         |                          |   |   |  |         |                                    |   |
|                         | (ii)        |                          |   |   |  |         |                                    |   |
|                         | (i)         |                          |   |   |  |         |                                    |   |
|                         | (ii)        |                          |   |   |  |         |                                    |   |
|                         | (i)         |                          |   |   |  |         |                                    |   |
|                         | (ii)        |                          |   |   |  |         |                                    |   |
|                         | (i)         |                          |   |   |  |         |                                    |   |
|                         | (ii)        |                          |   |   |  |         |                                    |   |

| Part III   Supplemental Information  |
|--|
| Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information. |
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### **SCHEDULE M** (Form 990)

**Noncash Contributions** 

OMB No. 1545-0047

Open To Public Inspection

Department of the Treasury Internal Revenue Service

Name of the organization

► Complete if the organizations answered "Yes" on Form 990, Part IV, lines 29 or 30.

Attach to Form 990.

► Go to www.irs.gov/Form990 for the latest information.

STARKEY HEARING FOUNDATION

Employer identification number 36-3297852

| Pai      | rt I Types of Property   |                     |                         |                             |                    |  |         |    |
|----------|--|---------------------|-------------------------|-----------------------------|--------------------|--|---------|----|
|          |  | (a)                 | <b>(b)</b><br>Number of | (c) Noncash contribution    | (d)                |  | . ~     |    |
|          |  | Check if applicable |                         | amounts reported or         |                    |  | •       | 'S |
|          |  | арріючью            | items contributed       | Form 990, Part VIII, line   | 1g                 | ation an   | iourit. |    |
| 1        | Art - Works of art   |                     |                         |                             |                    |  |         |    |
| 2        | Art - Historical treasures   |                     |                         |                             |                    |  |         |    |
| 3        | Art - Fractional interests   |                     |                         |                             |                    |  |         |    |
| 4        | Books and publications   |                     |                         |                             |                    |  |         |    |
| 5        | Clothing and household goods   |                     |                         |                             |                    |  |         |    |
| 6        | Cars and other vehicles  |                     |                         |                             |                    |  |         |    |
| 7        | Boats and planes   |                     |                         |                             |                    |  |         |    |
| 8        | Intellectual property  |                     |                         |                             |                    |  |         |    |
| 9        | Securities - Publicly traded   | X                   | 4                       | 73,29                       | 8.FMV              |  |         |    |
| 10       | Securities - Closely held stock                                      |                     |                         |                             |                    |  |         |    |
| 11       | Securities - Partnership, LLC, or                                    |                     |                         |                             |                    |  |         |    |
|          | trust interests  |                     |                         |                             |                    |  |         |    |
| 12       | Securities - Miscellaneous   |                     |                         |                             |                    |  |         |    |
| 13       | Qualified conservation contribution -                                |                     |                         |                             |                    |  |         |    |
|          | Historic structures  |                     |                         |                             |                    |  |         |    |
| 14       | Qualified conservation contribution - Other                          |                     |                         |                             |                    |  |         |    |
| 15       | Real estate - Residential  |                     |                         |                             |                    |  |         |    |
| 16       | Real estate - Commercial   |                     |                         |                             |                    |  |         |    |
| 17       | Real estate - Other  |                     |                         |                             |                    |  |         |    |
| 18       | Collectibles   |                     |                         |                             |                    |  |         |    |
| 19       | Food inventory   |                     |                         | 16 542 52                   | 0 5357             |  |         |    |
| 20       | Drugs and medical supplies   | X                   | 3                       | 16,743,73                   | 8 • F.W A          |  |         |    |
| 21       | Taxidermy  |                     |                         |                             |                    |  |         |    |
| 22       | Historical artifacts   |                     |                         |                             |                    |  |         |    |
| 23       | Scientific specimens   |                     |                         |                             |                    |  |         |    |
| 24       | Archeological artifacts  | v                   | 2                       | 224 45                      | 1 PM77             |  |         |    |
| 25       | Other (SUPPLIES)   | X<br>X              | 2                       | 324,45                      | 8.FMV              |  |         |    |
| 26       | Other (FOOD & BEVERA)  | Λ                   |                         | 23,73                       | O • FMV            |  |         |    |
| 27       | Other ()   |                     |                         |                             |                    |  |         |    |
| 28<br>29 | Other ( )  | zation durin        | a the tay year for a    | entributions                |                    |  |         |    |
| 29       | Number of Forms 8283 received by the organization completed Form 828 |                     | •                       |                             |                    |  |         |    |
|          | for which the organization completed Form 828                        | oo, Fait IV,        | Donee Acknowled         | gernerit <u>29</u>          |                    | 1,   | Yes     | No |
| 302      | During the year, did the organization receive by                     | , contributio       | on any proporty ro      | ported in Part I lines 1 th | arough 28, that it |  | res     | NO |
| Jua      | must hold for at least three years from the date                     |                     |                         |                             |                    |  |         |    |
|          | exempt purposes for the entire holding period?                       |                     | ,                       |                             |                    | 30a  |         | х  |
| h        | If "Yes," describe the arrangement in Part II.                       |                     |                         |                             |                    | Joan   |         |    |
| 31       | Does the organization have a gift acceptance p                       | oolicy that r       | equires the review      | of any nonstandard con      | tributions?        | 31   | х       |    |
|          | Does the organization hire or use third parties of                   |                     |                         |                             |                    | <del>                                     </del> |         |    |
| <u>u</u> | contributions?   |                     | •                       |                             |                    | 32a  |         | х  |
| b        | If "Yes," describe in Part II.                                       |                     |                         |                             |                    | <u></u>  |         |    |
| 33       | If the organization didn't report an amount in c                     | olumn (c) fo        | r a type of propert     | v for which column (a) is   | checked.           |  |         |    |
|          | describe in Part II.   |                     | -71 3. 6. 5001          | ,(a) 10                     | ,                  |  |         |    |
|          |  |                     |                         |                             |                    |  |         |    |

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990. Schedule M (Form 990) 2017

| Schedule M | I (Form 990) 2017  |  |   | FOUNDATION                                    |  | 36-3297852   | Page 2         |
|------------|--|--|---|---|--|--|----------------|
| Part II    | Supplementa<br>is reporting in Pa<br>this part for any a | Il Information<br>t I, column (b), the<br>additional informa | Provide the ine<br>e number of coution. | formation required by ntributions, the number | Part I, lines 30b, 32b, and 33<br>er of items received, or a com | , and whether the organiza<br>bination of both. Also com | ation<br>plete |
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### SCHEDULE O (Form 990 or 990-EZ)

Department of the Treasury

Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on Form 990 or 990-EZ or to provide any additional information.

➤ Attach to Form 990 or 990-EZ.

➤ Go to www.irs.gov/Form990 for the latest information.

2017
Open to Public Inspection

36-3297852

0 for the latest information. Inspection

Employer identification number

Name of the organization

STARKEY HEARING FOUNDATION

FORM 990, PART III, LINE 4A, PROGRAM SERVICE ACCOMPLISHMENTS:

INTERNATIONAL HEARING SOCIETY HEARING INSTRUMENT SPECIALIST AND THE

WORLD HEALTH ORGANIZATION PRIMARY EAR AND HEARING CARE COURSES, AND THE

PUBLIC HEALTH APPROACH FOR DISTRICT LEVEL EAR AND HEARING HEALTH COURSE

OFFERED BY THE LONDON SCHOOL OF HYGIENE AND TROPICAL MEDICINE. AS A

RESULT OF OUR MISSION WORK, THE FOUNDATION MAINTAINS THE LARGEST

HEARING HEALTHCARE PATIENT INFORMATION REPOSITORY IN THE WORLD.

INFORMATION GLEANED FROM THE DATABASE IS USED TO EVALUATE THE

EFFECTIVENESS AND EFFICIENCY OF PROGRAMS AND BY TO ASSES AND SHAPE

GOVERNMENTAL POLICY IN OUR PARTNER COUNTRIES.

FORM 990, PART VI, SECTION B, LINE 11B:

THE FINANCE TEAM PROVIDES INFORMATION TO AN OUTSIDE TAX PREPARER TO PREPARE

A DRAFT OF THE FORM 990. THE JOINT EXECUTIVE AND FINANCE COMMITTEE, WHICH

INCLUDES THE PRESIDENT AND TREASURER, THEN REVIEWS AND APPROVES THE FORM

990. AFTER COMMITTEE APPROVAL, ALL BOARD MEMBERS RECEIVE AN ELECTRONIC COPY

OF THE FORM 990 FOR REVIEW BEFORE FILING.

FORM 990, PART VI, SECTION B, LINE 12C:

THE ORGANIZATION'S CONFLICT OF INTEREST POLICY APPLIES TO ALL BOARD

MEMBERS, OFFICERS, STAFF MEMBERS, AND MEMBERS OF A BOARD COMMITTEE WITH

BOARD-DELEGATED POWERS AS WELL AS THEIR IMMEDIATE FAMILY MEMBERS, INCLUDING

SPOUSE OR EQUIVALENT, CHILDREN, AND PARENTS, AND ANYONE WHO CAN INFLUENCE

THE ACTIONS OF THE ORGANIZATION OR HAS PROPRIETARY INFORMATION CONCERNING

THE ORGANIZATION. DISCLOSURE IN THE ORGANIZATION SHOULD BE MADE TO THE

BOARD OF DIRECTORS OR BOARD COMMITTEE. THE BOARD OR THE DULY CONSTITUTED

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

| STARKEY HEARING FOUNDATION   | 36-3297852          |
|--|---------------------|
| COMMITTEE WILL THEN DETERMINE IF A CONFLICT OF INTEREST                    | EXISTS, THE         |
| INDIVIDUAL FOR WHICH THE CONFLICT LIES WILL BE EXCLUDED 1                  | FROM ALL DISCUSSION |
| AND VOTING ON ANY TRANSACTIONS INVOLVING THAT MATTER.                      |                     |
|  |                     |
| FORM 990, PART VI, SECTION B, LINE 15:                                     |                     |
| ALL COMPENSATION IS REVIEWED WITH COMPARABILITY DATA AND                   | OTHER RELEVANT      |
| INFORMATION PROVIDED BY COMPENSATION CONSULTANTS TO SET I                  | REASONABLE          |
| COMPENSATION. ALL COMPENSATION DECISIONS ARE SUBSTANTIATE                  | ED                  |
| CONTEMPORANEOUSLY. THE FOUNDATION'S PRESIDENT DONATES HIS                  | S TIME TO THE       |
| ORGANIZATION AND IS NOT COMPENSATED FOR HIS WORK.                          |                     |
|  |                     |
| FORM 990, PART VI, LINE 17, LIST OF STATES RECEIVING COPY                  | Y OF FORM 990:      |
| AL, AK, AR, CA, CO, CT, FL, GA, HI, IL, KS, KY, ME, MD, MA, MI, MN, MS, NV | ,NH,NJ,NM,NY,NC,ND  |
| OH,OK,OR,PA,RI,SC,TN,UT,VA,WA,WV,WI  |                     |
|  |                     |
| FORM 990, PART VI, SECTION C, LINE 19:                                     |                     |
| CONFLICT OF INTEREST POLICY AND ARTICLES OF INCORPORATION                  | N ARE AVAILABLE     |
| UPON REQUEST. THE CURRENT AND PREVIOUS YEARS FORM 990S F                   | ILED WITH THE IRS,  |
| ARE OPEN TO THE PUBLIC ON THE FOUNDATION'S WEBSITE: WWW.                   | STARKEYHEARING      |
| FOUNDATION.ORG   |                     |
|  |                     |
|  |                     |
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#### SCHEDULE R (Form 990)

**Related Organizations and Unrelated Partnerships** 

Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.

➤ Attach to Form 990.

► Go to www.irs.gov/Form990 for instructions and the latest information.

2017 Open to Public Inspection

OMB No. 1545-0047

Name of the organization

Department of the Treasury Internal Revenue Service

# STARKEY HEARING FOUNDATION

 $\begin{array}{c} \textbf{Employer identification number} \\ 36-3297852 \end{array}$ 

| (a)  | (b)                      | (c)                      | (d)          | (e)                | (f)                |
|--|--------------------------|--------------------------|--------------|--------------------|--------------------|
| Name, address, and EIN (if applicable)       | Primary activity         | Legal domicile (state or | Total income | End-of-year assets | Direct controlling |
| of disregarded entity                        |                          | foreign country)         |              |                    | entity             |
| STARKEY HEARING FOUNDATION, LLC - 38-3976820 |                          |                          |              |                    |                    |
| 5700 WASHINGTON AVE SO.                      |                          |                          |              |                    | STARKEY HEARING    |
| EDEN PRAIRIE, MN 55344                       | INTERNATIONAL ACTIVITIES | MINNESOTA                |              |                    | FOUNDATION         |
|  |                          |                          |              |                    |                    |
|  | 1                        |                          |              |                    |                    |
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Part II Identification of Related Tax-Exempt Organizations. Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related tax-exempt organizations during the tax year.

| (a) Name, address, and EIN of related organization | <b>(b)</b><br>Primary activity | (c) Legal domicile (state or foreign country) | (d)<br>Exempt Code<br>section | (e) Public charity status (if section | (f) Direct controlling entity | Section 5<br>contr<br>enti |    |
|--|--------------------------------|---|-------------------------------|---------------------------------------|-------------------------------|----------------------------|----|
|  |                                |   |                               | 501(c)(3))                            |                               | Yes                        | No |
| STARKEY HEARING INSTITUTE LIMITED                  | ]                              |   |                               |                                       |                               |                            |    |
| PLOT 6 PRINX, LUSAKA, CHANDWE MUSONDA ROAD         |                                |   | INTERNATIONA                  |                                       | STARKEY HEARING               |                            |    |
| , LUSAKA, ZAMBIA 51074                             | ZAMBIA ACTIVITY                | ZAMBIA  | NGO                           |                                       | FOUNDATION, LLC               | X                          |    |
| STARKEY HEARING FOUNDATION                         |                                |   |                               |                                       |                               |                            |    |
| FELARON COURT - B6 MWINGI ROAD KILELESHWA          | 1                              |   | INTERNATIONA                  |                                       | STARKEY HEARING               |                            |    |
| , NAIROBI, KENYA 00202                             | KENYA ACTIVITY                 | KENYA   | NGO                           |                                       | FOUNDATION, LLC               | X                          |    |
|  | _                              |   |                               |                                       |                               |                            |    |
|  | _                              |   |                               |                                       |                               |                            |    |
|  |                                |   |                               |                                       |                               |                            |    |
|  |                                |   |                               |                                       |                               |                            |    |
|  |                                |   |                               |                                       |                               |                            |    |

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Part III Identification of Related Organizations Taxable as a Partnership. Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related organizations treated as a partnership during the tax year.

|  | •                |   |                           |  |                       |                                   |     |                     |  |                             |  |
|--|------------------|---|---------------------------|--|-----------------------|-----------------------------------|-----|---------------------|--|-----------------------------|--|
| (a)  | (b)              | (c)                                       | (d)                       | (e)  | (f)                   | (g)                               | (1  | h)                  | (i)  | (j)                         | (k)  |
| Name, address, and EIN of related organization | Primary activity | Legal<br>domicile<br>(state or<br>foreign | Direct controlling entity | Predominant income<br>(related, unrelated,<br>excluded from tax under<br>sections 512-514) | Share of total income | Share of<br>end-of-year<br>assets |     | ortionate<br>tions? | Code V-UBI<br>amount in box<br>20 of Schedule<br>K-1 (Form 1065) | General of managin partner? | Percentage<br>ownership                          |
|  |                  | country)                                  |                           | sections 512-514)  |                       |                                   | Yes | No                  | K-1 (Form 1065)  | Yes No                      | <u> </u>   |
|  |                  |   |                           |  |                       |                                   |     |                     |  |                             |  |
|  | 1                |   |                           |  |                       |                                   |     |                     |  |                             |  |
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|  |                  |   |                           |  |                       |                                   |     |                     | 1  |                             |  |

Part IV Identification of Related Organizations Taxable as a Corporation or Trust. Complete if the organization answered "Yes" on Form 990, Part IV, line 34, because it had one or more related organizations treated as a corporation or trust during the tax year.

| (a) Name, address, and EIN of related organization | <b>(b)</b><br>Primary activity | (c) Legal domicile (state or foreign | (d) Direct controlling entity | (e) Type of entity (C corp, S corp, or trust) | (f)<br>Share of total<br>income | (g)<br>Share of<br>end-of-year<br>assets | (h)<br>Percentage<br>ownership | Section<br>512(b)(13)<br>controlled<br>entity? |  |
|--|--------------------------------|--------------------------------------|-------------------------------|---|---------------------------------|--|--------------------------------|--|--|
|  |                                | country)                             |                               | S. 1. 25.y                                    |                                 | 455515                                   |                                | Yes  | No   |
|  |                                |                                      |                               |   |                                 |  |                                |  |  |
|  |                                |                                      |                               |   |                                 |  |                                |  |  |
|  |                                |                                      |                               |   |                                 |  |                                |  | <del>                                     </del> |
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|  |                                |                                      |                               |   |                                 |  |                                |  |  |

Page 3

Part V Transactions With Related Organizations. Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36.

| Not  | te: Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.               |        |                               |  |         | Yes | No |  |  |  |  |
|--|---|--------|-------------------------------|--|---------|-----|----|--|--|--|--|
| 1  | During the tax year, did the organization engage in any of the following transactions with one or r | more r | elated organizations listed   | in Parts II-IV?                              |         |     | X  |  |  |  |  |
| а  | a Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity   |        |                               |  |         |     |    |  |  |  |  |
| b  | Gift, grant, or capital contribution to related organization(s)                                     |        |                               |  | 1b      | X   | Х  |  |  |  |  |
| С  | c Gift, grant, or capital contribution from related organization(s)                                 |        |                               |  |         |     |    |  |  |  |  |
| d  | Loans or loan guarantees to or for related organization(s)  |        |                               |  | 1d      |     | X  |  |  |  |  |
| е  | e Loans or loan guarantees by related organization(s)   |        |                               |  |         |     |    |  |  |  |  |
|  |   |        |                               |  |         |     |    |  |  |  |  |
| f  | f Dividends from related organization(s)  |        |                               |  |         |     |    |  |  |  |  |
| g  | g Sale of assets to related organization(s)   |        |                               |  |         |     |    |  |  |  |  |
| h  | Purchase of assets from related organization(s)   |        |                               |  | 1h      |     | X  |  |  |  |  |
| i  | Exchange of assets with related organization(s)   |        |                               |  | 1i      |     | X  |  |  |  |  |
| j  | Lease of facilities, equipment, or other assets to related organization(s)                          |        |                               |  | . 1j    |     | X  |  |  |  |  |
|  |   |        |                               |  |         |     |    |  |  |  |  |
| k  | Lease of facilities, equipment, or other assets from related organization(s)                        |        |                               |  | 1k      |     | X  |  |  |  |  |
| - 1  | Performance of services or membership or fundraising solicitations for related organization(s)      |        |                               |  | . 11    |     | X  |  |  |  |  |
|  | m Performance of services or membership or fundraising solicitations by related organization(s)     |        |                               |  |         |     |    |  |  |  |  |
|  | n Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)     |        |                               |  |         |     |    |  |  |  |  |
| Sharing of paid employees with related organization(s)       |   |        |                               |  |         |     |    |  |  |  |  |
|  |   |        |                               |  |         |     |    |  |  |  |  |
| p Reimbursement paid to related organization(s) for expenses |   |        |                               |  |         |     |    |  |  |  |  |
| q Reimbursement paid by related organization(s) for expenses |   |        |                               |  |         |     |    |  |  |  |  |
|  |   |        |                               |  |         |     |    |  |  |  |  |
| r  | r Other transfer of cash or property to related organization(s)                                     |        |                               |  |         |     |    |  |  |  |  |
| s  | s Other transfer of cash or property from related organization(s)                                   |        |                               |  |         |     |    |  |  |  |  |
|  | If the answer to any of the above is "Yes," see the instructions for information on who must comp   |        |                               |  |         |     |    |  |  |  |  |
|  | (a) Name of related organization  (b) Transaction type (a-si  |        | <b>(c)</b><br>Amount involved | <b>(d)</b><br>Method of determining amount i | nvolved |     |    |  |  |  |  |
| (1) \$   | STARKEY HEARING FOUNDATION B  |        | 1,518,670.                    | ARMS LENGTH                                  |         |     |    |  |  |  |  |
| (2)  | STARKEY HEARING INSTITUTE LIMITED B   |        | 492,368.                      | ARMS LENGTH                                  |         |     |    |  |  |  |  |
| (3)  |   |        |                               |  |         |     |    |  |  |  |  |
| (4)  |   |        |                               |  |         |     |    |  |  |  |  |
| (5)  |   |        |                               |  |         |     |    |  |  |  |  |
|  |   |        |                               |  |         |     |    |  |  |  |  |

Part VI Unrelated Organizations Taxable as a Partnership. Complete if the organization answered "Yes" on Form 990, Part IV, line 37.

Provide the following information for each entity taxed as a partnership through which the organization conducted more than five percent of its activities (measured by total assets or gross revenue) that was not a related organization. See instructions regarding exclusion for certain investment partnerships.

| (a)                    | (b)              | (c)               | (d)  | (e)<br>Are a<br>partners<br>501(c)<br>orgs. | )    | (f)      | (g)         | (      | h)             | (i)  | (j)      | (k)           |
|------------------------|------------------|-------------------|--|---|------|----------|-------------|--------|----------------|--|----------|---------------|
| Name, address, and EIN | Primary activity | Legal domicile    | Predominant income<br>(related, unrelated,<br>excluded from tax under<br>sections 512-514) | partners                                    | Sec. | Share of | Share of    | Disp   | ropor-<br>nate | Code V-UBI<br>amount in box 20<br>of Schedule K-1<br>(Form 1065) | General  | or Percentage |
| of entity              |                  | (state or foreign | excluded from tax under  | orgs.                                       | ?    | total    | end-of-year | alloca | tions?         | of Schedule K-1  | partne   | ownership     |
|                        |                  | country)          | sections 512-514)  | Yes I                                       |      | income   | assets      | Yes    | No             | (Form 1065)  | Yes N    | О             |
|                        |                  |                   |  |   |      |          |             |        |                |  |          |               |
|                        |                  |                   |  |   |      |          |             |        |                |  |          |               |
|                        |                  |                   |  |   |      |          |             |        |                |  |          |               |
|                        |                  |                   |  |   |      |          |             |        |                |  |          |               |
|                        |                  |                   |  |   |      |          |             |        |                |  | $\vdash$ |               |
|                        | 1                |                   |  |   |      |          |             |        |                |  |          |               |
|                        |                  |                   |  |   |      |          |             |        |                |  |          |               |
|                        | 1                |                   |  |   |      |          |             |        |                |  |          |               |
|                        |                  |                   |  | $\vdash$                                    |      |          |             | -      | -              |  | $\vdash$ | +             |
|                        | -                |                   |  |   |      |          |             |        |                |  |          |               |
|                        | -                |                   |  |   |      |          |             |        |                |  |          |               |
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|                        | ı                |                   |  |   |      |          |             |        |                |  |          |               |
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