

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

**2017**

Department of the Treasury  
Internal Revenue Service

▶ **Do not enter social security numbers on this form as it may be made public.**  
▶ **Go to [www.irs.gov/Form990PF](http://www.irs.gov/Form990PF) for instructions and the latest information**

Open to Public Inspection

**For calendar year 2017 or tax year beginning** \_\_\_\_\_, **2017, and ending** \_\_\_\_\_

THE EDWARD & ELIZABETH CONNER FOUNDATION  
P.O. BOX 1318  
VENICE, CA 90294

<b>A</b>	Employer identification number 94-6131053
<b>B</b>	Telephone number (see instructions) (310) 823-5872
<b>C</b>	If exemption application is pending, check here. ▶ <input type="checkbox"/>
<b>D 1</b>	Foreign organizations, check here. . . . . ▶ <input type="checkbox"/>
<b>D 2</b>	Foreign organizations meeting the 85% test, check here and attach computation . . . . . ▶ <input type="checkbox"/>
<b>E</b>	If private foundation status was terminated under section 507(b)(1)(A), check here. . . . . ▶ <input type="checkbox"/>
<b>F</b>	If the foundation is in a 60-month termination under section 507(b)(1)(B), check here. . . . . ▶ <input type="checkbox"/>

**G** Check all that apply:

<input type="checkbox"/> Initial return	<input type="checkbox"/> Initial return of a former public charity
<input type="checkbox"/> Final return	<input type="checkbox"/> Amended return
<input type="checkbox"/> Address change	<input type="checkbox"/> Name change

**H** Check type of organization:  Section 501(c)(3) exempt private foundation  
 Section 4947(a)(1) nonexempt charitable trust  Other taxable private foundation

**I** Fair market value of all assets at end of year (from Part II, column (c), line 16)  
▶ \$ 1,998,737.

**J** Accounting method:  Cash  Accrual  
 Other (specify) \_\_\_\_\_  
(Part I, column (d) must be on cash basis.)

<b>Part I Analysis of Revenue and Expenses</b> (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)	
<b>R E V E N U E</b>	<b>1</b> Contributions, gifts, grants, etc., received (attach schedule) . . .					
	<b>2</b> Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B					
	<b>3</b> Interest on savings and temporary cash investments. . . . .	83,715.	83,715.	83,715.		
	<b>4</b> Dividends and interest from securities . . . . .	7,702.	7,702.	7,702.		
	<b>5a</b> Gross rents . . . . .					
	<b>b</b> Net rental income or (loss) . . . . .					
	<b>6a</b> Net gain or (loss) from sale of assets not on line 10. . . . .	-3,429.				
	<b>b</b> Gross sales price for all assets on line 6a . . . . . 40,040.					
	<b>7</b> Capital gain net income (from Part IV, line 2) . . . . .		0.			
	<b>8</b> Net short-term capital gain. . . . .			0.		
	<b>9</b> Income modifications . . . . .					
	<b>10a</b> Gross sales less returns and allowances. . . . .					
<b>b</b> Less: Cost of goods sold. . . . .						
<b>c</b> Gross profit or (loss) (attach schedule) . . . . .						
<b>11</b> Other income (attach schedule) . . . . .						
<b>12 Total.</b> Add lines 1 through 11. . . . .	87,988.	91,417.	91,417.			
<b>A D M I N I S T R A T I V E O P E R A T I N G A N D E X P E N S E S</b>	<b>13</b> Compensation of officers, directors, trustees, etc. . . . .	19,000.				
	<b>14</b> Other employee salaries and wages . . . . .					
	<b>15</b> Pension plans, employee benefits . . . . .					
	<b>16a</b> Legal fees (attach schedule) . . . . .					
	<b>b</b> Accounting fees (attach sch) . . . See St. 1	2,071.				
	<b>c</b> Other professional fees (attach sch) . . . . .					
	<b>17</b> Interest . . . . .					
	<b>18</b> Taxes (attach schedule)(see instrs) . . See Stm. 2	2,510.				
	<b>19</b> Depreciation (attach schedule) and depletion . . . . .					
	<b>20</b> Occupancy . . . . .					
	<b>21</b> Travel, conferences, and meetings . . . . .	5,831.				
	<b>22</b> Printing and publications. . . . .					
	<b>23</b> Other expenses (attach schedule) . . . . .					
	<b>See Statement 3</b>		11,577.			
	<b>24 Total operating and administrative expenses.</b> Add lines 13 through 23. . . . .	40,989.				
<b>25</b> Contributions, gifts, grants paid. . . . . Part XV.	117,200.			117,200.		
<b>26 Total expenses and disbursements.</b> Add lines 24 and 25 . . . . .	158,189.					
<b>27</b> Subtract line 26 from line 12:						
<b>a Excess of revenue over expenses and disbursements</b> . . . . .	-70,201.					
<b>b Net investment income</b> (if negative, enter -0-). . .		91,417.				
<b>c Adjusted net income</b> (if negative, enter -0-). . . .			91,417.			

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)			
		Beginning of year	End of year		
		(a) Book Value	(b) Book Value	(c) Fair Market Value	
ASSETS	1	Cash — non-interest-bearing	29,498.	75,835.	75,835.
	2	Savings and temporary cash investments	339,004.	228,616.	228,616.
	3	Accounts receivable			
		Less: allowance for doubtful accounts			
	4	Pledges receivable			
		Less: allowance for doubtful accounts			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach sch)			
		Less: allowance for doubtful accounts			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments — U.S. and state government obligations (attach schedule)			
	b	Investments — corporate stock (attach schedule)	270,405.	265,296.	299,025.
	c	Investments — corporate bonds (attach schedule)	1,036,322.	1,035,281.	1,395,261.
	11	Investments — land, buildings, and equipment: basis			
	Less: accumulated depreciation (attach schedule)				
12	Investments — mortgage loans				
13	Investments — other (attach schedule)				
14	Land, buildings, and equipment: basis				
	Less: accumulated depreciation (attach schedule)				
15	Other assets (describe)				
16	<b>Total assets</b> (to be completed by all filers — see the instructions. Also, see page 1, item I)	1,675,229.	1,605,028.	1,998,737.	
LIABILITIES	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, & other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe)			
	23	<b>Total liabilities</b> (add lines 17 through 22)	0.	0.	
NET ASSETS OR FUND BALANCES	<b>Foundations that follow SFAS 117, check here</b> <input type="checkbox"/> <b>and complete lines 24 through 26, and lines 30 and 31.</b>				
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
	<b>Foundations that do not follow SFAS 117, check here</b> <input checked="" type="checkbox"/> <b>and complete lines 27 through 31.</b>				
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg., and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	1,675,229.	1,605,028.	
30	<b>Total net assets or fund balances</b> (see instructions)	1,675,229.	1,605,028.		
31	<b>Total liabilities and net assets/fund balances</b> (see instructions)	1,675,229.	1,605,028.		

**Part III Analysis of Changes in Net Assets or Fund Balances**

1	Total net assets or fund balances at beginning of year — Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,675,229.
2	Enter amount from Part I, line 27a	2	-70,201.
3	Other increases not included in line 2 (itemize)	3	
4	Add lines 1, 2, and 3	4	1,605,028.
5	Decreases not included in line 2 (itemize)	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30	6	1,605,028.

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shares MLC Company)	(b) How acquired P — Purchase D — Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1 a ML STOCK - SHORT TERM	P	Various	Various
b ML STOCK - LOING TERM	P	Various	Various
c ML # 4052 CAP GAIN DIST	P		
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))
a 16,004.		16,975.	-971.
b 23,902.		26,494.	-2,592.
c 134.			134.
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			-971.
b			-2,592.
c			134.
d			
e			

2 Capital gain net income or (net capital loss)..... <span style="border: 1px solid black; padding: 2px;">If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7</span> .....	2	-3,429.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):  If gain, also enter in Part I, line 8, column (c). See instructions. If (loss), enter -0- in Part I, line 8..... <span style="border: 1px solid black; padding: 2px;"> </span> .....	3	-837.

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2016	96,400.	1,953,291.	0.049353
2015	86,600.	1,561,559.	0.055457
2014	68,000.	1,903,957.	0.035715
2013	63,969.		
2012	93,150.	34,412.	2.706905

2 Total of line 1, column (d) .....	2	2.847430
3 Average distribution ratio for the 5-year base period — divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years. ....	3	0.569486
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5.....	4	1,923,201.
5 Multiply line 4 by line 3.....	5	1,095,236.
6 Enter 1% of net investment income (1% of Part I, line 27b).....	6	914.
7 Add lines 5 and 6.....	7	1,096,150.
8 Enter qualifying distributions from Part XII, line 4.....	8	117,200.

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

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

<b>1 a</b> Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter 'N/A' on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary – see instructions)		
<b>b</b> Domestic foundations that meet the section 4940(e) requirements in Part V, check here. <input type="checkbox"/> and enter 1% of Part I, line 27b	1	1,828.
<b>c</b> All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
<b>2</b> Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	2	0.
<b>3</b> Add lines 1 and 2	3	1,828.
<b>4</b> Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	4	0.
<b>5 Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-	5	1,828.
<b>6 Credits/Payments:</b>		
<b>a</b> 2017 estimated tax pmts and 2016 overpayment credited to 2017	<b>6 a</b>	682.
<b>b</b> Exempt foreign organizations – tax withheld at source	<b>6 b</b>	
<b>c</b> Tax paid with application for extension of time to file (Form 8868)	<b>6 c</b>	2,000.
<b>d</b> Backup withholding erroneously withheld	<b>6 d</b>	
<b>7</b> Total credits and payments. Add lines 6a through 6d	7	2,682.
<b>8</b> Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	
<b>9 Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b>	9	0.
<b>10 Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b>	10	854.
<b>11</b> Enter the amount of line 10 to be: <b>Credited to 2018 estimated tax</b> 854. <b>Refunded</b>	11	0.

**Part VII-A Statements Regarding Activities**

	Yes	No
<b>1 a</b> During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
<b>b</b> Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition		X
If the answer is 'Yes' to <b>1a</b> or <b>1b</b> , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		
<b>c</b> Did the foundation file <b>Form 1120-POL</b> for this year?		X
<b>d</b> Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: <b>(1)</b> On the foundation. . . . ▶ \$ 0. <b>(2)</b> On foundation managers. . . . ▶ \$ 0.		
<b>e</b> Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. . . . ▶ \$ 0.		
<b>2</b> Has the foundation engaged in any activities that have not previously been reported to the IRS? If 'Yes,' attach a detailed description of the activities.		X
<b>3</b> Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conformed copy of the changes		X
<b>4 a</b> Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
<b>b</b> If 'Yes,' has it filed a tax return on <b>Form 990-T</b> for this year?		N/A
<b>5</b> Was there a liquidation, termination, dissolution, or substantial contraction during the year? If 'Yes,' attach the statement required by General Instruction T.		X
<b>6</b> Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		X
<b>7</b> Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, col. (c), and Part XV	X	
<b>8 a</b> Enter the states to which the foundation reports or with which it is registered. See instructions. <u>N/A</u>		
<b>b</b> If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by <i>General Instruction G</i> ? If 'No,' attach explanation	X	
<b>9</b> Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2017 or the tax year beginning in 2017? See the instructions for Part XIV. If 'Yes,' complete Part XIV.		X
<b>10</b> Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses.		X

**Part VII-A Statements Regarding Activities (continued)**

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes,' attach schedule. See instructions.	11	Yes	No X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If 'Yes,' attach statement. See instructions.	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address: <u>www.connerfound.org</u>	13	X	
14	The books are in care of <u>K CONNER</u> Telephone no. <u>(310) 823-5872</u> Located at <u>P.O. BOX 1318 VENICE CA</u> ZIP + 4 <u>90294</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> — check here. <u>N/A</u> and enter the amount of tax-exempt interest received or accrued during the year. <u>15</u> <u>N/A</u>			
16	At any time during calendar year 2017, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If 'Yes,' enter the name of the foreign country	16	Yes	No X

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

**File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies.**

		Yes	No
1 a	During the year, did the foundation (either directly or indirectly):		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6)	Agree to pay money or property to a government official? ( <b>Exception.</b> Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is 'Yes' to 1a(1)–(6), did <b>any</b> of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions. <u>1 b</u> <u>N/A</u> Organizations relying on a current notice regarding disaster assistance, check here <input type="checkbox"/>		
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2017? <u>1 c</u> <u>X</u>		
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a	At the end of tax year 2017, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2017? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If 'Yes,' list the years <u>20__ , 20__ , 20__ , 20__</u>		
b	Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to <b>all</b> years listed, answer 'No' and attach statement — see instructions.) <u>2 b</u> <u>N/A</u>		
c	If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here. <u>20__ , 20__ , 20__ , 20__</u>		
3 a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If 'Yes,' did it have excess business holdings in 2017 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2017.) <u>3 b</u> <u>N/A</u>		
4 a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? <u>4 a</u> <u>X</u>		
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2017? <u>4 b</u> <u>X</u>		

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

**5 a** During the year, did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?  Yes  No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?  Yes  No

(3) Provide a grant to an individual for travel, study, or other similar purposes?  Yes  No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions  Yes  No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?  Yes  No

**b** If any answer is 'Yes' to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions **5 b** N/A

Organizations relying on a current notice regarding disaster assistance, check here

**c** If the answer is 'Yes' to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? **N/A**  Yes  No

If 'Yes,' attach the statement required by Regulations section 53.4945–5(d).

**6 a** Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?  Yes  No

**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6 b** X

If 'Yes' to 6b, file Form 8870.

**7 a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  Yes  No

**b** If 'Yes,' did the foundation receive any proceeds or have any net income attributable to the transaction? **7 b** N/A

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Statement 4		19,000.	0.	0.

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

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

**Total** number of other employees paid over \$50,000 **0**

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

**3 Five highest-paid independent contractors for professional services. See instructions. If none, enter 'NONE.'**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
None ----- -----		
----- -----		
----- -----		
----- -----		
----- -----		
Total number of others receiving over \$50,000 for professional services	0	

**Part IX-A Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1 N/A ----- -----	
2 ----- -----	
3 ----- -----	
4 ----- -----	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

	Amount
1 N/A ----- -----	
2 ----- -----	
All other program-related investments. See instructions. 3 ----- -----	
Total. Add lines 1 through 3	0.

BAA

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

<b>1</b> Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b> Average monthly fair market value of securities.....	<b>1 a</b>	1,685,180.
<b>b</b> Average of monthly cash balances.....	<b>1 b</b>	267,308.
<b>c</b> Fair market value of all other assets (see instructions).....	<b>1 c</b>	
<b>d Total</b> (add lines 1a, b, and c).....	<b>1 d</b>	1,952,488.
<b>e</b> Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).....	<b>1 e</b>	0.
<b>2</b> Acquisition indebtedness applicable to line 1 assets.....	<b>2</b>	0.
<b>3</b> Subtract line 2 from line 1d.....	<b>3</b>	1,952,488.
<b>4</b> Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions).....	<b>4</b>	29,287.
<b>5 Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4.....	<b>5</b>	1,923,201.
<b>6 Minimum investment return.</b> Enter 5% of line 5.....	<b>6</b>	96,160.

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

<b>1</b> Minimum investment return from Part X, line 6.....	<b>1</b>	96,160.
<b>2 a</b> Tax on investment income for 2017 from Part VI, line 5.....	<b>2 a</b>	1,828.
<b>b</b> Income tax for 2017. (This does not include the tax from Part VI.).....	<b>2 b</b>	
<b>c</b> Add lines 2a and 2b.....	<b>2 c</b>	1,828.
<b>3</b> Distributable amount before adjustments. Subtract line 2c from line 1.....	<b>3</b>	94,332.
<b>4</b> Recoveries of amounts treated as qualifying distributions.....	<b>4</b>	
<b>5</b> Add lines 3 and 4.....	<b>5</b>	94,332.
<b>6</b> Deduction from distributable amount (see instructions).....	<b>6</b>	
<b>7 Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.....	<b>7</b>	94,332.

**Part XII** **Qualifying Distributions** (see instructions)

<b>1</b> Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b> Expenses, contributions, gifts, etc. — total from Part I, column (d), line 26.....	<b>1 a</b>	117,200.
<b>b</b> Program-related investments — total from Part IX-B.....	<b>1 b</b>	
<b>2</b> Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.....	<b>2</b>	
<b>3</b> Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b> Suitability test (prior IRS approval required).....	<b>3 a</b>	
<b>b</b> Cash distribution test (attach the required schedule).....	<b>3 b</b>	
<b>4 Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4.....	<b>4</b>	117,200.
<b>5</b> Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions.....	<b>5</b>	
<b>6 Adjusted qualifying distributions.</b> Subtract line 5 from line 4.....	<b>6</b>	117,200.

**Note:** The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.



**Part XIII Undistributed Income** (see instructions)

	(a) Corpus	(b) Years prior to 2016	(c) 2016	(d) 2017
<b>1</b> Distributable amount for 2017 from Part XI, line 7 .....				94,332.
<b>2</b> Undistributed income, if any, as of the end of 2017:				
<b>a</b> Enter amount for 2016 only.....			0.	
<b>b</b> Total for prior years: 20 __, 20 __, 20 __		0.		
<b>3</b> Excess distributions carryover, if any, to 2017:				
<b>a</b> From 2012 .....	93,529.			
<b>b</b> From 2013 .....	65,000.			
<b>c</b> From 2014 .....	68,000.			
<b>d</b> From 2015 .....	10,360.			
<b>e</b> From 2016 .....	553.			
<b>f Total</b> of lines 3a through e .....	237,442.			
<b>4</b> Qualifying distributions for 2017 from Part XII, line 4: ▶ \$ 117,200.				
<b>a</b> Applied to 2016, but not more than line 2a ..			0.	
<b>b</b> Applied to undistributed income of prior years (Election required — see instructions).....		0.		
<b>c</b> Treated as distributions out of corpus (Election required — see instructions).....	0.			
<b>d</b> Applied to 2017 distributable amount.....				94,332.
<b>e</b> Remaining amount distributed out of corpus.....	22,868.			
<b>5</b> Excess distributions carryover applied to 2017..... (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
<b>6 Enter the net total of each column as indicated below:</b>				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5. ....	260,310.			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b .....		0.		
<b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.....		0.		
<b>d</b> Subtract line 6c from line 6b. Taxable amount — see instructions .....		0.		
<b>e</b> Undistributed income for 2016. Subtract line 4a from line 2a. Taxable amount — see instructions .....			0.	
<b>f</b> Undistributed income for 2017. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2018.....				0.
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required — see instructions) .....	0.			
<b>8</b> Excess distributions carryover from 2012 not applied on line 5 or line 7 (see instructions).....	93,529.			
<b>9 Excess distributions carryover to 2018.</b> Subtract lines 7 and 8 from line 6a.....	166,781.			
<b>10 Analysis of line 9:</b>				
<b>a</b> Excess from 2013.....	65,000.			
<b>b</b> Excess from 2014.....	68,000.			
<b>c</b> Excess from 2015.....	10,360.			
<b>d</b> Excess from 2016.....	553.			
<b>e</b> Excess from 2017.....	22,868.			

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

**1 a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2017, enter the date of the ruling ▶

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

	Tax year				(e) Total
	(a) 2017	(b) 2016	(c) 2015	(d) 2014	
<b>2 a</b> Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
<b>b</b> 85% of line 2a					
<b>c</b> Qualifying distributions from Part XII, line 4 for each year listed					
<b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities					
<b>e</b> Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
<b>3</b> Complete 3a, b, or c for the alternative test relied upon:					
<b>a</b> 'Assets' alternative test — enter:					
<b>(1)</b> Value of all assets					
<b>(2)</b> Value of assets qualifying under section 4942(j)(3)(B)(i)					
<b>b</b> 'Endowment' alternative test — enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
<b>c</b> 'Support' alternative test — enter:					
<b>(1)</b> Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
<b>(2)</b> Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
<b>(3)</b> Largest amount of support from an exempt organization					
<b>(4)</b> Gross investment income					

**Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year — see instructions.)**

**1 Information Regarding Foundation Managers:**

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

None

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

None

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

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

**a** The name, address, and telephone number or email address of the person to whom applications should be addressed:

See Statement 5

**b** The form in which applications should be submitted and information and materials they should include:

See Statement for Line 2a

**c** Any submission deadlines:

See Statement for Line 2a

**d** Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

See Statement for Line 2a

**Part XV** Supplementary Information (continued)

**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<p><i>a Paid during the year</i> See Statement 6</p>				
<b>Total</b> .....				<b>3 a</b> 117,200.
<p><i>b Approved for future payment</i></p>				
<b>Total</b> .....				<b>3 b</b>





## THE EDWARD &amp; ELIZABETH CONNER FOUNDATION

94-6131053

**Statement 1**  
**Form 990-PF, Part I, Line 16b**  
**Accounting Fees**

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
ACCOUNTING.....	\$ 2,071.			
Total	<u>\$ 2,071.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>

**Statement 2**  
**Form 990-PF, Part I, Line 18**  
**Taxes**

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
TAXES.....	\$ 2,510.			
Total	<u>\$ 2,510.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>

**Statement 3**  
**Form 990-PF, Part I, Line 23**  
**Other Expenses**

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
BANK FEES.....	\$ 822.			
CHECKS, SUPPLIES.....	370.			
CORP FILING FEES.....	25.			
INSURANCE.....	1,250.			
INVESTMENT ADVISOR.....	4,107.			
MEMBERSHIPS.....	969.			
MISC FOREIGN TAX.....	41.			
OFFICE SUPPLIES.....	571.			
PO BOX.....	284.			
POSTAGE AND PHONE EQUIPT.....	3,138.			
Total	<u>\$ 11,577.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>

**Statement 4**  
**Form 990-PF, Part VIII, Line 1**  
**List of Officers, Directors, Trustees, and Key Employees**

Name and Address	Title and Average Hours Per Week Devoted	Compen- sation	Contri- bution to EBP & DC	Expense Account/ Other
KATHLEEN CONNER 1164 VAN BUREN AVE VENICE, CA 90291	President 5.00	\$ 7,500.	\$ 0.	\$ 0.

## THE EDWARD &amp; ELIZABETH CONNER FOUNDATION

94-6131053

**Statement 4 (continued)**  
**Form 990-PF, Part VIII, Line 1**  
**List of Officers, Directors, Trustees, and Key Employees**

Name and Address	Title and Average Hours Per Week Devoted	Compen- sation	Contri- bution to EBP & DC	Expense Account/ Other
TIMOTHY B CONNER 251 COUNTRY ROAD 9 CHENANGO FORKS, NY 13746	Vice President 5.00	\$ 3,500.	\$ 0.	\$ 0.
CATHERINE ANN CONNER 4888 THOMAS ROAD SEBASTOPOL, CA 95472	Secretary 5.00	2,500.	0.	0.
SAMUEL B PARKER 1031 VAN BUREN AVE VENICE, CA 90291	Treasurer 5.00	2,500.	0.	0.
MORGAN CONNER 161 SACRAMENTO AVENUE SAN ANSELMO, CA 94960	BOARD MEMBER 5.00	1,500.	0.	0.
SYDNEY CONNER 4888 THOMAS ROAD SEBASTOPOL, CA 95472	BOARD MEMBER 5.00	1,500.	0.	0.
Total		\$ 19,000.	\$ 0.	\$ 0.

**Statement 5**  
**Form 990-PF, Part XV, Line 2a-d**  
**Application Submission Information**

Name of Grant Program: THE EDWARD & ELIZABETH CONNER FOUNDATION  
Name: KATHLEEN CONNER  
Care Of: KATHLEEN CONNER  
Street Address: PO BOX 1318  
City, State, Zip Code: VENICE, CA 90291  
Telephone: (310) 823-5872  
E-Mail Address:  
Form and Content: NO SPECIFIC FORM.  
Submission Deadlines: 45 DAYS BEFORE GRANT IS NEEDED.  
Restrictions on Awards: STUDENTS MUST INITIATE HIGHER EDUCATION AT A TWO OR FOUR YEAR INSTITUTION AND BE GRADUATES OF LIBERTY HIGH SCHOOL OR GREENE CENTRAL HIGH SCHOOL.

## THE EDWARD &amp; ELIZABETH CONNER FOUNDATION

94-6131053

**Statement 6**  
**Form 990-PF, Part XV, Line 3a**  
**Recipient Paid During the Year**

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Jenna Acosta 4042 Pelican Court Discovery Bay CA 94505	NONE	I	EDUCATION	\$ 4,000.
Ismael Alvarez 801 Birch Street, Apt. 4 Brentwood CA 94513	NONE	I	EDUCATION	2,800.
Dylan Barton 775 Indian Brook Road Greene NY 13778	NONE	I	EDUCATION	2,800.
Alexis Bondoc 2416 Balboa Way Discovery Bay CA 94505	NONE	I	EDUCATION	1,600.
Race Bentley 267 King Road Greene NY 13778	NONE	I	EDUCATION	800.
Angelica Calderon 191 Kayla Place Brentwood CA 94513	NONE	I	EDUCATION	4,000.
Matthew Carlin 118 Meadow Drive Greene NY 13778	NONE	I	EDUCATION	2,400.
Paige M. Castle 104 Caedar Circle Greene NY 13778	NONE	I	EDUCATION	4,000.
Kaitlyn Dunlap 7 Mill Street Greene NY 13778	NONE	I	EDUCATION	2,000.
Morgan Ellis 9121 Bourcher Place, Apt. 207 Charlotte NC 28262	NONE	I	EDUCATION	4,000.
Yamilex Gomez 6020 Balfour Road Brentwood CA 94513	NONE	I	EDUCATION	2,000.
Kassidy Gustafson 10 Viking Drive Pleasant Hill CA 94523	NONE	1	EDUCATION	4,000.
Jenna Harrington 193 King Road Greene NY 13778	NONE	I	EDUCATION	2,000.



## THE EDWARD &amp; ELIZABETH CONNER FOUNDATION

94-6131053

**Statement 6 (continued)**  
**Form 990-PF, Part XV, Line 3a**  
**Recipient Paid During the Year**

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Jordan Harrington 193 King Road Greene NY 13778	NONE	I	EDUCATION	\$ 2,000.
Josh Harrington 193 King Road Greene NY 13778	NONE	I	EDUCATION	4,000.
Ryan Hastings 2 Franklin Street Greene NY 13778	NONE	I	EDUCATION	400.
Emily Gonzalez P.O. Box 11917, Santa Cruz Rm 1442 Santa Barbara CA 93107	NONE	I	EDUCATION	2,000.
Garrett Hebbard 4687 State Highway 41 Greene NY 13778	NONE	I	EDUCATION	4,000.
Jessica Ketzak 251 Fox Road Greene NY 13778	NONE	I	EDUCATION	2,000.
Michelle La Haie 292 Honeysuckle Court Brentwood CA 94513	NONE	I	EDUCATION	4,000.
Jacob Ledford 197 Ingraham Road Greene NY 13778	NONE	I	EDUCATION	1,200.
Phoebe M. Kelleher 910 Mericrest Street Brentwood CA 94513	NONE	I	EDUCATION	800.
Alex Mack 11 North Chenango Street Greene NY 13778	NONE	I	EDUCATION	2,000.
Jill McDaniels 1110 County Road 9 Greene NY 13778	NONE	I	EDUCATION	2,400.
Jenelle Milk 43 Hattie Clark Road Greene NY 13778	NONE	I	EDUCATION	4,000.
Emily Montelione 226 Parks Road Chenango Forks NY 13746	NONE	I	EDUCATION	2,000.

## THE EDWARD &amp; ELIZABETH CONNER FOUNDATION

94-6131053

**Statement 6 (continued)**  
**Form 990-PF, Part XV, Line 3a**  
**Recipient Paid During the Year**

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Mary Klecha 137 Klech Lane Greene NY 13778	NONE	I	EDUCATION	\$ 2,000.
Alexander Newman 2290 Biscay Court Discovery Bay CA 94505	NONE	I	EDUCATION	2,000.
Adrian Ochoa 3537 Sailboat Drive Discovery Bay CA 94505	NONE	I	EDUCATION	200.
Emily Olivera 7701 College Town Drive, #17 Sacramento CA 95826	NONE	I	EDUCATION	2,800.
Alicia Olivieri 106 Miller Court Greene NY 13778	NONE	I	EDUCATION	2,800.
Maria Pantoja 903 Chianti Way Oakley CA 94561	NONE	I	EDUCATION	2,800.
Miriam Perez PO Box 15450, San Rafael, Rm 2301 Santa Barbara CA 93107	NONE	I	EDUCATION	4,000.
Abigail Porada 411 French Road Oxford NY 13830	NONE	I	EDUCATION	2,800.
Claire Raines 152 Trent Place Brentwood CA 94513	NONE	I	EDUCATION	2,000.
Lydia Reagan 45 South Chenango Street Greene NY 13778	NONE	I	EDUCATION	200.
Dakota Reinders 9806 Ladera Court Rancho Cucamonga CA 91730	NONE	I	EDUCATION	2,000.
McCain Rowland 105 Back Street Oxford NY 13830	NONE	I	EDUCATION	1,800.

## THE EDWARD &amp; ELIZABETH CONNER FOUNDATION

94-6131053

**Statement 6 (continued)**  
**Form 990-PF, Part XV, Line 3a**  
**Recipient Paid During the Year**

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Esperanza Rojas 25 Lisa Court Brentwood CA 94513	NONE	I	EDUCATION	\$ 800.
Carley Shoemaker 668 State Highway 206 Greene NY 13778	NONE	I	EDUCATION	200.
Leigha Schultes 197 McBerney Road Greene NY 13778	NONE	I	EDUCATION	1,200.
Erin M. Thomas 181 Pondlilly Lane Brentwood CA 94513	NONE	I	EDUCATION	1,200.
Taylor Savage 187 Slater Road Greene NY 13778	NONE	I	EDUCATION	800.
Sierra Turner 5 Elm Street Greene NY 13778	NONE	I	EDUCATION	2,000.
Tyler Unkel 1473 County Road 32 Greene NY 13778	NONE	I	EDUCATION	2,000.
Hayley Stroobant 1351 Eisenhower Way Brentwood CA 94513	NONE	I	EDUCATION	800.
Zachary Utter 45 North Canal Street Greene NY 13778	NONE	I	EDUCATION	2,000.
Mariana Valdez 750 Eureka Avenue Brentwood CA 94513	NONE	I	EDUCATION	2,400.
Eliza Whitaker 322 Hattie Clark Road Greene NY 13778	NONE	I	EDUCATION	2,000.
Rita Landski 2490 Channing Way, Room 514 A Berkeley CA 94704	NONE	I	EDUCATION	2,000.
Katherine Lawson 58 Guise Way Brentwood CA 94513	NONE	I	EDUCATION	800.

## THE EDWARD &amp; ELIZABETH CONNER FOUNDATION

94-6131053

Statement 6 (continued)  
 Form 990-PF, Part XV, Line 3a  
 Recipient Paid During the Year

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Dannica LiPetri 3221 Hudson Drive Brentwood CA 94513	NONE	I	EDUCATION	\$ 800.
Emma McCoy P.O. Box 12185, San Miguel, RM6434 Santa Barbara CA 93107	NONE	I	EDUCATION	2,000.
Rosalyn Morales 2470 Cerritos Road Brentwood CA 94513	NONE	I	EDUCATION	800.
Michael Mulderig 103 Raleigh Road Harpursville NY 13787	NONE	I	EDUCATION	800.
Marissa Pavlovich 1480 County Road 332 Greene NY 13778	NONE	I	EDUCATION	2,000.
Total				\$ <u>117,200.</u>