Form 990-PF

Return of Private Foundation or Section 4947(a)(1) Nonexempt Charitable Trust

OMB No. 1545-0052

		nent of the Treasury Revenue Service	Note: The organizat	T	reated as a Priva	te Foundation		rtina maviramente	1998
_			98, or tax year b			· · · · · · · · · · · · · · · · · · ·			8/31 99
-			proanization	<u>egini</u>	ing 037	<u>vi</u> , io.	. ai	v <u>-</u>	er identification number
			ngamzauon					A Employ	er identification number
1		he IRS							
			IOR I ZON FOU				-		406294
		rwise, Number an e print	nd street (or P.O. bo)	(numbe	r if mail is not delivered to	street address)	Room		ne number (see page 9 of uctions)
I		ype.							2010107
ç		pecific 1625	HINMAN AVE	NUE			202	() –
			vn, state, and ZIP + 4					C If exemption appli	cation is
									izations, check here
		EVANS	TON, IL 60	201					d attach computation
н	Che				(c)(3) exempt private f	oundation		check here an	d attach computation
ï			nonexempt charitable		Other taxable pri				on status was terminated
1		market value of a			ounting method: X Ci				(b)(1)(A), check here 🕨 []
				JACCU		ash [] Accruai			is in a 60-month termination (b)(1)(B), check here
		ear (from Part II, o	1 7 .	/Dart I	Other (specify)	anab booin)			
	16)		<u>676,895.</u>		, column (d) must be on	i casti basis.j		G If address change	d, check here
P	art I		enue and Expense nts in columns (b), (c),		(a) Revenue and	(b) Net investment		(c) Adjusted net	(d) Disbursements for charitable
			arily equal the amour		expenses per	income		income	purposes
_			ge 9 of the instruction		books	income		income	(cash basis only)
	1	Contributions, gifts, grau	nts, etc., received (atlach s	chedule).					
	2		split-interest trusts	-					
	3		nd temporary cash invest						
	4	-	erest from securities		184,106.	184,106			
	-				104,100.	104,300	′ ·		an an dara ya saya na kana ana ang kang kang kang kang ka
					LEBRO BRACCERCEL	Stell strategicalitation	rala si it	(i	
	Ь	-	(loss)		400 000				
	6	Net gain or (loss) from	n sale of assets not on lir	ne 10 .	433,960.				
÷.	7	Capital gain net in	come (from Part IV, li	ine 2) 🔒		433,960		ele la Stalate de la composi- Ménana de la composición	
Revenue	8	Net short-term cap	pital gain						
å	9		ons						
	10a	Gross sales less re and allowances							
	b	Less: Cost of goods so					10000		
	с	Gross profit or (los	s) (attach schedule)				11		
	11		r income (attach schedule) STMT	T 1	192.	192			
				•••••					en en service en
	12	Total Add lines 1	through 11 · · · ·		618,258.	618,258	. 1		ing an ing ang ang ang ang ang ang ang ang ang a
-	13		cers, directors, trustees, e		10,000	010,200	<u>' - </u>		10,000.
					10,000				10,000,
	14		alaries and wages		····				
	15		ployee benefits		700			Nove	700
		Legal fees (attach			798.	NON		NONE	
			attach schedule) ST			NON		NONE	2,580.
	C	-	fees (attach sche		35,088.	35,088	· . [
Expenses	17								
Aper	18	Taxes (attach schedul	le) (see page 12 of th Sin	M.T.Ion 5	-6,727.				2,241.
Ű,	19	Depreciation (attac	ch schedule) and dep	letion				······	
ativ	20								
at .	21		s, and meetings						
min	22		cations						
Adt	23		ttach schedule)STM		820.	L		· ·	820.
pue					020.		+		020.
ng t	24	-	nd administrative exp		42 EE0	35 400		NONE	16 400
Operating			ugh 23		42,559.	35,088	<u></u>	NONE	
Dpe	25		s, grants paid		572,234.	<u>ere en para</u>		<u></u>	572,234.
3	26	•	nd disbursements. A			· · · ·			
_		24 and 25 • • •		• • • •	614,793.	35,088		NONE	588,673.
	27	Subtract line 26 fi	rom line 12:					h dha khi d	
	а	Excess of revenue	e over expenses and						n in an an an in the second
		disbursements _			3,465.	<u> </u>			<u>, , , , , , , , , , , , , , , , , , , </u>
	b	-	come (if negative, en			583,170			
			me (if negative, enter						

JSA For Paperwork Reduction Act Notice, see the instructions. 8E1410 1.000

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Fo	rm 99	0-PF (1998)			Page 2
P	art II	Attached schedules and amounts in the description column should be for	Beginning of year	End o	f year
	art II	end-of-year amounts only. (See instructions.)	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing	15, 681.	<u>21, 592.</u>	21, 592.
	2	Savings and temporary cash investments	138, 717.	<u> </u>	175, 686.
	3	Accounts receivable			
		Less: allowance for deubtful 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 page 14 of the instructions)			
	7	Other notes and loans receivable (attach chedule)			
ets		Less: allowance for doubtful accounts			
Assets	8	Inventories for sale or use			
1	9	Prepaid expenses and deferred charges			
	10 a	Investments - U.S. and state government obligations (attantedula)	1, 134, 478.	<u>616, 985.</u>	619, 332.
		Investments - corporate stock (attach schedule)	2,071,693.	1, 939, 504.	3, 451, 383.
	с	Investments - corporate bonds (attach schedule)	819, 562.	<u>1, 422, 344.</u>	1, 402, 114.
	11	Investments - land, buildings, and equipment: basis			
		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 (describeSTMT_10)	NONE	6, 788.	6, 788.
	16	Total assets (to be completed by all filers - see page 15 of			
_		the instructions. Also, see page 1, item I)	4, 180, 131.	<u>4, 182, 899.</u>	<u>5, 676, 895.</u>
	17	Accounts payable and accrued expenses	201.		
6	18	Grants payable			
tie	19	Deferred revenue			
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons			
Lia	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe			
			1 001		
_	23	Total liabilities (add lines 17 through 22)	201.		
		Organizations that follow SFAS 117, check here			
s		and complete lines 24 through 26 and lines 30 and 31.			
ice D	24	Unrestricted	Į		
ılar	25	Temporarily restricted			
or Fund Balances	26	Permanently restricted			
pu		Organizations that do not follow SFAS 117, check here and complete lines 27 through 31, X			
ц			4 170 020	4 102 000	
õ	27	Capital stock, trust principal, or current funds	4, 179, 930.	4, 182, 899.	
Net Assets	28	Paid-in or capital surplus, or land, bldg., and equipment fund	4		
Ass	29	Retained earnings, accumulated income, endowment, or other funds			
let	30	Total net assets or fund balances (see page 16 of the	1 170 020	1 100 000	
z	~ ~	instructions)	4, 179, 930.	4, 182, 899.	
	31	Total liabilities and net assets/fund balances (see page 16 of the instructions)	4, 180, 131.	4, 182, 899.	
_		the instructions)		4, 102, 077.	
P	art I	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	4, 179, 930.
2	Enter amount from Part I, line 27a	2	3, 465.
3	Other increases not included in line 2 (itemize)	3	
4	Add lines 1, 2, and 3	4	4, 183, 395.
5	Decreases not included in line 2 (itemize) SEE STATEMENT 11	5	496.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	4, 182, 899.

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P	art IV Capital Gains	and Losses for Tax on Inv	estment Income		I	
	.,	l describe the kind(s) of property sold, (ick warehouse; or common stock, 200	3	(b) How acquired P-Purchase D-Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	SEE PART IV SCH	HEDULE				
k						
C	;					
	1					
)					
	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale		(h) Gain or (lo (e) plus (f) mini	
_k						
 c						
_		owing gain in column (h) and own	ed by the foundation on 12/31/69	m	Gains (Col. (h) g	ain minus
	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any		(k), but not less Losses (from co	than -0-) or
a	1					
k)					
	;					
	1					
E	•					
2	Capital gain net income or (gain, also enter in Part I, line 7 (loss), enter -0- in Part I, line 7	2		433, 960.
3		or (loss) as defined in sections 122 line 8, column (c) (see pages 11 ar	22(5) and (6):			1007 700.
	If (loss), enter -0- in Part I, li		P	3		
Р			ced Tax on Net Investment Inc	-		
(F			section 4940(a) tax on net investr		me.)	
lf	section 4940(d)(2) applies, l	eave this part blank.				
	the same day the first large					
	-		butable amount of any year in the	base peri	00?	Yes X No
<u> </u>	res, the organization does	not qualify under section 4940(e)	. Do not complete this part.			
1	Enter the appropria	ate amount in each column for eac	h year; see page 16 of the instruct	ions befo	re making any	entries.
	(a)	(b)			(d)	
	Base period years Calendar year (or tax year beginning in)	Adjusted qualifying distributions	(c) Net value of noncharitable-use assets		Distribution ra (col. (b) divided by	
	1997	758, 398.	5, 498, 677.			92372238
	1996	230, 832.	4, 903, 775.			07230654
	1995	159, 992.	4, 433, 871.		0.036	08404484
	1994	220, 189.	3, 889, 625.		0.056	60931324
_	1993	260, 256.	3, 962, 147.		0.065	68559925
2	Total of line 1, column (d)			2	0.343	37498625
3	-	or the 5-year base period-divide t			0.0/0	(7400705
	the number of years the fo	undation has been in existence if l	ess than 5 years	3	0.068	67499725
4	Enter the net value of none	charitable-use assets for 1998 fron	n Part X, line 5	n₄	5,	499, 248.
5	Multiply line 4 by line 3			n 5		<u>377, 661.</u>
6	Enter 1% of net investmen	t income (1% of Part I, line 27b)		N 6		5,832.
7	Add lines 5 and 6			n 7		<u>383, 493.</u>
8	Enter qualifying distribution If line 8 is equal to or great the Part VI instructions on	er than line 7, check the box in Pa	rt VI, line 1b, and complete that pa	N₈ rt using a	1% tax rate. S	<u>588, 673.</u> ee

Form	990-PF (1998)		Р	age 4
Par	t VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see page 16 of th	e instru	ctions)
1a	Exempt operating foundations described in section 4940(d)(2), check here and enter "N/A" on line 1.			
	Date of ruling letter: (attach copy of ruling letter if necessary - see instructions)			
b	Domestic organizations that meet the section 4940(e) requirements in Part V, check	<u> </u>	, 832	<u> </u>
	here X and enter 1% of Part I, line 27b			
с	All other domestic organizations, enter 2% of line 27b. Exempt foreign organizations enter 4% of line 12b			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			
3	Add lines 1 and 2	5,	, 832	<u>'. </u>
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		NON	
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5	5,	, 832	<u>'. </u>
6	Credits/Payments:			
а	1998 estimated tax payments and 1997 overpayment credited to 1998 6a 4 , 000 .			
b	Exempt foreign organizations - tax withheld at source			
С	Tax paid with application for extension of time to file (Form 2758)			
d	Backup withholding erroneously withheld			
7	Total credits and payments. Add lines 6a through 6d 7	12,	, 000)
8	Enter any PENALTY for underpayment of estimated tax. Check here if Form 2220 is attached 8			
9	TAX DUE. If the total of lines 5 and 8 is more than line 7, enter AMOUNT OWED 9			
10	OVERPAYMENT. If line 7 is more than the total of lines 5 and 8, enter the AMOUNT OVERPAID	6,	, 168	\$. <u> </u>
11	Enter the amount of line 10 to be: Credited to 1999 estimated tax 6, 168. Refunded 11			
Par	t VII-A Statements Regarding Activities			
1 a	During the tax year, did the organization attempt to influence any national, state, or local legislation or did		Yes	No
	it participate or intervene in any political campaign?	1a		X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page			
	17 of the instructions for definition)?	1 b		<u>X</u>
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials			
	published or distributed by the organization in connection with the activities.			
с	Did the organization file Form 1120-POL for this year?	1 c		<u>X</u>
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:			
	(1) On the organization. \$ (2) On organization managers. \$			
е	Enter the reimbursement (if any) paid by the organization during the year for political expenditure tax imposed			
	on organization managers. \$			
2	Has the organization engaged in any activities that have not previously been reported to the IRS?	2		<u>X</u>
	If "Yes," attach a detailed description of the activities.			
3	Has the organization 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	3		<u>X</u>
4 a	Did the organization have unrelated business gross income of \$1,000 or more during the year?	4a		<u>X</u>
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4 b	N/	Ά
5	Was there a liquidation, termination, dissolution or substantial contraction during the year?	5		<u> </u>
	If "Yes," attach the statement required by General Instruction T.			
6	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?	6	X	
7	Did the organization have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	7	Х	
8 a	Enter the states to which the foundation reports or with which it is registered (see page 18 of the			
	instructions) ILLINOIS	_		
b	If the answer is "Yes" to line 7, has the organization furnished a copy of Form 990-PF to the Attorney			
	General (or designate) of each state as required by General Instruction G? If "No," attach explanation	8 b	Х	
9	Is the organization claiming status as a private operating foundation within the meaning of section 4942(j)(3)			
	or 4942(j)(5) for calendar year 1998 or the taxable year beginning in 1998 (see instructions for Part XIV on			
	page 23)? If "Yes," complete Part XIV	9		<u>X</u>
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.	10		<u>X</u>
11a	Did anyone request to see either the organization's annual return or its exemption application (or both)?	1a		<u>X</u>
b	If "Yes," did the organization comply pursuant to the instructions? (See General Instruction Q.)	<u>1b</u>	<u>N</u> /	A
12	The books are in care of ETHELYN BOND Telephone no847/5	70-82	202	
	Located at 1625 HINMAN AVENUE, #202, EVANSTON, IL ZIP+4 60201			I
13	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041Check here.			
	and enter the amount of tax-exempt interest received or accrued during the year 13			

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Pa	art	VII-B Statements Regarding Activities for Which Form 4720 May Be Required		
1	Se	File Form 4720 if any Item is checked in the "Yes" column, unless an exception applies.		Yes No
		During the year did the organization (either directly or indirectly):		
		(1) Engage in the sale or exchange, or leasing of property with a disqualified person?		
		(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)		
		a disqualified person? Yes X No		
		(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes X No		
		(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?		
		(5) Transfer any income or assets to a disqualified person (or make any of either available		
		for the benefit or use of a disqualified person)?		
		(6) Agree to pay money or property to a government official? (Exception. Check "No"		
		if the organization agreed to make a grant to or to employ the official for <u>a period</u>		
		after termination of government service, if terminating within 90 days.)		
	h	If any answer is "Yes" to 1a(1)-(6), did ANY 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 page 18 of the		
		instructions)?	Ŋь	N/A
		Organizations relying on a current notice regarding disaster assistance check here		
	~	Did the organization engage in a prior year in any of the acts described in 1a, other than excepted acts.		
	С	that were not corrected before the first day of the tax year beginning in 1998?	n.	Х
2		Taxes on failure to distribute income (section 4942) (does not apply for years the organization		
-		was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
	а	At the end of the tax year 1998, did the organization have any undistributed income (lines 6d		
	ä	and 6e, Part XIII) for tax year(s) beginning before 1998?		
		If "Yes," list the years 19 19 19 19		
	h	Are there any years listed in 2a for which the organization is NOT applying the provisions of section 4942(a)(2)		
	-	(relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2)		
		to ALL years listed, answer "No" and attach statement - see page 18 of the instructions.)	n _{2b}	X
	с	If the provisions of section 4942(a)(2) are being applied to ANY of the years listed in 2a, list the years here.		
		19 19 19 19		
3		Taxes on excess business holdings (section 4943):		
	а	Did the organization hold more than a 2% direct or indirect interest in any business		
		enterprise at any time during the year?		
	b	If "Yes," did it have excess business holdings in 1998 as a result of (1) any purchase by the organization		
		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 organization had excess business holdings in 1998.)	ßb	N/A
4		Taxes on investments that jeopardize charitable purposes (section 4944):		
	а	Did the organization invest during the year any amount in a manner that would jeopardize its charitable		
		purposes?	la	X
	b	Did the organization 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 1998?	Ъb	<u>X</u>
5		Taxes on taxable expenditures (section 4945) and political expenditures (section 4955):		
	а	During the year did the organization pay or incur any amount to:		
		(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?		
		(2) Influence the outcome of any specific public election (see section 4955); or to carry on,		
		directly or indirectly, any voter registration drive?		
		(3) Provide a grant to an individual for travel, study, or other similar purposes?		
		(4) Provide a grant to an organization other than a charitable, etc., organization described		
		in section 509(a)(1), (2), or (3), or section 4940(d)(2)?		
		(5) Provide for any purpose other than religious, charitable, scientific, literary, or		
		educational purposes, or for the prevention of cruelty to children or animals?		
	b	If any answer is "Yes" to 5a(1)-(5), did ANY of the transactions fail to qualify under the exceptions described in	n	
		Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 19 of the instructions)?	5b	<u>N/A</u>
		Organizations relying on a current notice regarding disaster assistance check here		
	С	If the answer is "Yes" to question 5a(4), does the organization claim exemption from the tax		
		because it maintained expenditure responsibility for the grant?		
		If "Yes," attach the statement required by Regulations section 53.4945-5(d).		

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Part VIII Information About Officers, Director and Contractors	s, Trustees, Foun	dation Managers	, Highly Paid Empl	oyees,
1 List all officers, directors, trustees, foundation ma	anagers and their c	ompensation (see	page 19 of the instru	ctions):
(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 12	_	10,000.	NONE	NONE
	_			
	-			
2 Compensation of five highest-paid employees (ot If none, enter "NONE."		ided on line 1 - see	page 19 of the instr	uctions).
(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	_	NONE	NONE	NONE
	_			
	_			
	_			
 Total number of other employees paid over \$50,000 Five highest-paid independent contractors for pro "NONE." 	ofessional services	- (see page 19 of th	ne instructions). If no	one, enter
(a) Name and address of each person paid more t	han \$50,000	(b) Тур	e of service	(c) Compensation
NONE				NONE
Total number of others receiving over \$50,000 for profe	essional services			0
Part IX-A Summary of Direct Charitable Activiti				
List the foundation's four largest direct charitable activities during the tax	•		as the number	Expenses
of organizations and other beneficiaries served, conferences convened, r 1 NONE	esearch papers produced	etc.		
2				
3				
4				

	Part	IX-B Summary of Program-Related Investments (see page 20 of the instructions)	
2			Amount
A verage monthy fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: A verage monthy fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: A verage monthy fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: A verage monthy fair market value of assets (or held for use) directly in carrying out charitable, etc., NONE A trait (add index 15, h, and 0) A trait (add index 16, h, and 0) A subtract in the attractions, the attractions, (Section 4942(i)(3) and (i)(5) private operating foundations and certain foreign organizations check here A and on the attractions, (Section 4942(i)(3) and (i)(5) private operating foundations and certain foreign organizations check here A and on the attraction 4942(i)(3) and (i)(5) private operating foundations A and certain foreign organizations check here A and on the attraction 4942(i)(3) and (i)(5) private operating foundations A and certain foreign organizations check here A and on the organizations (here the tax from Part V1), in the here A and certain foreign organizations (here the tax from Part V1), in the here A and certain foreign organizations (here the tax from Part V1), in the here A and certain foreign organizations (here the tax from Part V1), in the here A and there A converte a and b	1 _	<u>NONE</u>	
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 a Expenses, contributions, gifts, etc total from Part I, column (d), line 26. b Program-related investments - total of lines 1-3 of Part IX-B c Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes a Suitability test (prior IRS approval required) b Cash distribution test (attach the required schedule) c Adualifying distributions. Add lines 1 a through 3b. Enter here and on Part V, line 8 and Part XIII, line 4 d Sa8 , 673. b Crganizations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see page 22 of the instructions) c Adjusted qualifying distributions. Subtract line 5 from line 4 c Adjusted qualifying distributions. Subtract line 5 from line 4 c Adjusted qualifying distributions. Subtract line 5 from line 4 c Adjusted qualifying distributions. Subtract line 5 from line 4 c Adjusted qualifying distributions. 			
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 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes Amounts set aside for specific charitable projects that satisfy the: a Suitability test (prior IRS approval required) b Cash distribution test (attach the required schedule) Cash distributions. Add lines 1a through 3b. Enter here and on Part V, line 8 and Part XIII, line 4 Corganizations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see page 22 of the instructions) Adjusted qualifying distributions. Subtract line 5 from line 4 Adjusted qualifying distributions. Subtract line 5 from line 4 The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation 			
 Amounts set aside for specific charitable projects that satisfy the: a Suitability test (prior IRS approval required) b Cash distribution test (attach the required schedule) 4 Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8 and Part XIII, line 4 4 588, 673. 5 Organizations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see page 22 of the instructions) 6 Adjusted qualifying distributions. Subtract line 5 from line 4 6 582, 841. Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation 	2		
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b Cash distribution test (attach the required schedule) 3b NONE 4 Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8 and Part XIII, line 4 4 588, 673. 5 Organizations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see page 22 of the instructions) 5 5, 832. 6 Adjusted qualifying distributions. Subtract line 5 from line 4 6 582, 841. Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation			
 Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8 and Part XIII, line 4 Organizations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see page 22 of the instructions) Adjusted qualifying distributions. Subtract line 5 from line 4 Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation 			
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6 Adjusted qualifying distributions. Subtract line 5 from line 4 5 5,832. 6 Adjusted qualifying distributions. Subtract line 5 from line 4 6 582,841. Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation			
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation		income. Enter 1% of Part I, line 27b (see page 22 of the instructions)	
	6		•
		Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether th qualifies for the section 4940(e) reduction of tax in those years.	ne toundation

Part XIII Undistributed Income (see page 22 of the instructions)

		(a)	(b)	(c)	(d)
1	Distributable amount for 1998 from Part XI,	Corpus	Years prior to 1997	1997	1998
	line 7	n			269, 130.
2	Undistributed income, if any, as of the end of 1997:				
	Enter amount for 1997 only	n		NONE	
b	100/		NONE	None	
3	Excess distributions carryover, if any, to 1998:		NONE		
	From 1993				
		-			
b					
с					
d		-			
e	From 1997 491, 320.				
f	Total of lines 3a through e	544, 696.			
4	Qualifying distributions for 1998 from Part				
	XII, line 4: 588, 673.			None	
а	Applied to 1997, but not more than line 2a			NONE	
b	Applied to undistributed income of prior years				
	(Election required - see page 23 of the instructions)		NONE		
С	Treated as distributions out of corpus (Election				
	required - see page 23 of the instructions)	NONE			0/0 100
	Applied to 1998 distributable amount	010 540			269, 130.
e	Remaining amount distributed out of corpus	319, 543.			NONE
5	Excess distributions carryover applied to 1998 (If an amount appears in column (d), the same	NONE			NONE
	`amount must be shown in column (a).)				
6	Enter the net total of each column as indicated below:				
а	Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	864, 239.			
b	Prior years' undistributed income. Subtract				
	line 4b from line 2b	1	NONE		
С	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	n	NONE		
Ь	Subtract line 6c from line 6b. Taxable				
u	amount - see page 23 of the instructions	n	NONE		
е	Undistributed income for 1997. Subtract line 4a				
	from line 2a. Torship concrete compare 23 of the property instructions	n		NONE	
	Lindictributed income for 1000. Out to at l'				
f	Undistributed income for 1998. Subtract lines 4d and 5 from line 1. This amount must				
	be distributed in 1999				NONE
_					
7	Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(E) or				
	4942(g)(3) (see page 23 of the instructions)	NONE			
•	Excess distributions carryover from 1993 not applied				
8	on line 5 or line 7 (see page 23 of the instructions)	20, 886.			
9	Excess distributions carryover to 1999				
-	Subtract lines 7 and 8 from line 6a	843, 353.			
10	Analysis of line 9:				
	Excess from 1994 29, 962 .				
	Excess from 1995 NONE				
	Excess from 1996 2, 528.				
	Excess from 1997 491, 320.				
	Excess from 1998 319, 543.				
	017,010				

	n 990-PF (1998)	· · · · - · · · · · · · · · · · · · · · · · · ·			N N	Page 9 OT APPLI CABLE
				ctions and Part VII-A, o	question 9) IN	OT APPLI CABLE
1 a	If the foundation has receipt	0	•	/ate operating		
	foundation, and the ruling		•			(0.40%)(5)
b	Check box to indicate whe	•	a private operating found		n 4942(j)(3) or	4942(j)(5)
2 a	Enter the lesser of the	Tax year		Prior 3 years		
	adjusted net income from Part I or the minimum	(a) 1998	(b) 1997	(c) 1996	(d) 1995	(e) Total
	investment return from Parter	•				
	X for each year listed	L				
b	85% of line 2a					
c	Qualifying distributions from Part	n				
	XII, line 4 for each year listed					
a	Amounts included in line 2c not used directly for active generation	•				
	of exempt activities					
е	, , , , , , , , , , , , , , , , , , , ,					
	directly for active conduct of exempt activities. Su	n				
	line 2d from line 2c					
3	Complete 3a, b, or c for the alternative test relied upon:					
	alternative test relied upon.					
а	"Assets" alternative test - enter:					
	(1) Value of all assets					
	(2) Value of assets qualifying under section	n				
	4942(j)(3)(B)(i)					
b	"Endowment" alternative test - Enter 2/3 of minimum					
	investmen <u>t return shown in</u>	•				
	Part X, line					
C	"Support" alternative test - enter:					
	(1) Total support other than					
	gross investment income (interest, dividends, rents,					
	payments on securities					
	loans (section 5 2 or royalties)	n				
	(2) Support from general					
	public and 5 or more exempt organizations	_				
	as provided in sec (4942(j)(3)(B)(iii)	n				
	(3) Largest amount of support					
	from an exempt organization	n				
	(4) Gross investment income					
Pa	rt XV Supplementar	y Information (Comp	lete this part only if t	he organization had \$ instructions.)	5,000 or more in	
				instructions.)		
1	Information Regarding	-				
а	List any managers of the t before the close of any tax					ation
	SEE STATEM				or (a)(2):)	
h	List any managers of the f	foundation who own 10%	or more of the stock of :	a corporation (or an equa	Illy large portion of th	e ownership
N	of a partnership or other e				ing large perion of th	e ownersnip
	NONE	analy of which the found	allon has a row of great			
	NONE					
2	Information Regarding	Contribution Grant	Gift, Loan, Scholarsh	in, etc., Programs:		
2				aritable organizations and do	as not accont uncolicita	d roquests for funds
	If the organization makes gifts					
-	The name, address, and to		•		•	o nomo za, u, u, anu u.
d	THE HAME, AUULESS, AND U		serson to whom applicate	ons should be addlessed	•	
	The form in which applies	tions should be submitte	d and information and m	aterials they should inclu	de:	
D	The form in which applica		a and information and m	ateriais triey should inclu	u c .	
	Any submission dood!					
С	Any submission deadlines					

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

Grants and Contributions Paid	During the Year or . If recipient is an individual,		for Future Payment	
Recipient	show any relationship to	Foundation status of	Purpose of grant or	Amount
Name and address (home or business)	any foundation manager or substantial contributor	recipient	contribution	
a Paid during the year				
EE STATEMENT 13				
Total			3a	572, 234.
b Approved for future payment			04	072,201.
ONE				
Total			3b	

Form 990-PF (1998)					
Part XVI-A	Analysis of Income-Producing Activities				

Page 11	
(e) Related or exempt	
function income (See page 24 of	

Enter gross	amounts unless otherwise indicated.	Unrelate	d business income	Excluded by	y section 512, 513, or 514	(e) Related or exempt
4. December 1		(a) Business	(b)	(c) Exclușion	(d)	function income (See page 24 of
1 Program	n service revenue:	code	Amount	code	Amount	the instructions.)
a						
b						
с						
d						
e						
f						
g Fees	s and contracts from government agencies					
2 Member	ship dues and assessments					
3 Interest of	on savings and temporary cash investments					
	ds and interest from securities	n		14	184, 298.	
	al income or (loss) from real estate:					
		h				
	ot-financed property	K				
	debt-financed property					
6 Net renta	I income or (loss) from personal property					
7 Other in	vestment income					
8 Gain or (I	loss) from sales of assets other than inventory	/		18	433, 960.	
	ome or (loss) from special events	n				
	rofit or (loss) from sales of inventory					
11 Other re				14	100	
b _(OTHER INTEREST			14	192.	
c						
d						
е —						
e	Add columns (b) (d) and (e)	n			618 450	
12 Subtota	I. Add columns (b), (d), and (e)	Ŋ			618, 450.	618 450
12 Subtotal 13 Total. A	dd line 12, columns (b), (d), and (e)				618, 450. 13	618, 450.
12 Subtota 13 Total. A (See works	dd line 12, columns (b), (d), and (e) sheet in line 13 instructions on page 25				13	618, 450.
12 Subtota 13 Total. A (See works	dd line 12, columns (b), (d), and (e) sheet in line 13 instructions on page 25 /I-B Relationship of Activi	ities to th	e Accomplishme		¹³ pt Purposes	
12 Subtota 13 Total. A (See works Part X)	dd line 12, columns (b), (d), and (e) sheet in line 13 instructions on page 25 /I-B Relationship of Activi Explain below how each activit	i ties to th ty for whic	e Accomplishmen h income is reported	d in column	13 pt Purposes (e) of Part XVI-A contri	ibuted importantly to
12 Subtota 13 Total. A (See works	dd line 12, columns (b), (d), and (e) sheet in line 13 instructions on page 25 /I-B Relationship of Activi Explain below how each activit the accomplishment of the org	i ties to th ty for whic	e Accomplishmen h income is reported	d in column	13 pt Purposes (e) of Part XVI-A contri	ibuted importantly to
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Form 990-PF								Page	
Part XVI	Information F Exempt Orga		nsfers To and	Transac	tions a	and Relationships	With Nonchar	ritabl	е
1 Did th			n any of the followin	g with any o	ther orga	anization described in sec	tion	Yes	No
501(c) of the Code (other than	section 501(c)(3) o	rganizations) or in se	ection 527, r	elating to	o political organizations?			
a Trans	fers from the reporting or	ganization to a non	charitable exempt or	ganization o	f:				v
• • •	ash						a(1)		X
• •	ther assets						1a(2)		Х
	Transactions:	aritable averant area							Y
	ales of assets to a noncha urchases of assets from a						b(1) b(2)		X
	ental of facilities or equip								X
	eimbursement arrangeme								X
	oans or loan guarantees						b(5)		X X X
(6) P	erformance of services or	membership or fur	ndraising solicitations				b(6)		Х
	ng of facilities, equipment	-					1c		Х
	•	•	-			uld always show the fair n			
	-	-			-	nization received less than			
	•	n or sharing arrange	ement, show in colun	nn (d) the va	lue of the	e goods, other assets, or s	ervices		
receiv	(b) Amount involved	(c) Name of nor	charitable exempt orga	nization	(d) De	escription of transfers, transac	tions and sharing arrs	angeme	ote
(a) Line no.			charitable exempt orga	nization	(u) De		tions, and sharing and	angeme	115
	organization directly or in	•				organizations			7
	ibed in section 501(c) of t	(n section 501(c)(3))	or in sectior	527?			es X	
b If "Ye	s," complete the following								
	(a) Name of organization	1	(b) Type of or	rganization		(c) Descrip	tion of relationship		
Part XVI	Public Inspec	tion (see page	26 of the instru	ctions and	Gener	al Instruction Q)			
		len (eee page							
1 Enter	the date the notice of ava	ailability of the annu	al return appeared in	n a newspap	er				
	the name of the newspap								
		-			otice requ	uired by the instructions o	in page 26.		
	notice is not attached, the penalties of perjury, I declare				chedules	and statements, and to the b	est of mv knowledge a	nd belie	ef, it is
true, c						rmation of which preparer has			,
						R/I			
M _si	ignature of officer or trustee				Date	——— MI _{Title}			
<u> </u>	Preparer's			Date		Check if self-	Preparer's social	securit	y no.
Preparer's Use Only	signature					employed] .		-
Paid Paid eparer's	Firm's name (or	AMERI CA	N EXPRESS	TAX &	BUS.	SER. I NC EIN	41-17957	07	
Prep	yours if self-employed)		H WACKER D	RI VE					
	and address	CHI CAGO	, IL			ZIP + 4	60606-7	<u>494</u>	

FORM 990-PF - PART IV CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

	Kind of F	Property		Desc	ription		P or D	Date acquired	Date sold
	Gross sale price less	Depreciation allowed/	Cost or other	FMV as of	Adj. basis as of	Excess of FMV over		Gain or	
	price less expenses of sale	allowable	basis	12/31/69	12/31/69	adj basis		(loss)	
	618, 123.		SEE ATTACHEI PROPERTY TY 578, 562.		TIES			VAR 39, 561.	VAR
									VAR
1	, 364, 545.		SEE ATACHED PROPERTY TYI 970, 995.		ΓIES			VAR 393, 550.	VAR
	, ,							,	
	TOTAL GAIN(L	0SS)						433, 960. ======	
•									
A 4 7 2	0 1.000					2200			

FORM 990PF, PART I - OTHER INCOME

DESCRI PTI ON		REVENUE AND EXPENSES PER BOOKS	NET I NVESTMENT I NCOME
INTEREST FEDERAL EXCISE TAX REFUND		192.	192.
	TOTALS		

FORM 990PF, PART I - LEGAL FEES

DESCRI PTI ON		REVENUE AND EXPENSES PER BOOKS	NET I NVESTMENT I NCOME	ADJUSTED NET I NCOME	CHARI TABLE PURPOSES
MI SCELLANEOUS LEGAL FEES		798.			798
	TOTALS		NONE	NONE	798

FORM 990PF, PART I - ACCOUNTING FEES

DESCRI PTI ON		REVENUE AND EXPENSES PER BOOKS	NET I NVESTMENT I NCOME	ADJUSTED NET I NCOME	CHARI TABLE PURPOSES
ACCOUNTING AND TAX PREPARATION		2,580.	NONE	NONE	2, 580
	TOTALS	2, 580.	NONE	NONE	2, 580

FORM 990PF, PART I - OTHER PROFESSIONAL FEES

DESCRI PTI ON		REVENUE AND EXPENSES PER BOOKS	NET I NVESTMENT I NCOME
INVESTMENT MANAGEMENT FEES		35,088.	35,088.
	TOTALS	35,088.	35, 088.

FORM 990PF, PART I - TAXES

DESCRI PTI ON		REVENUE AND EXPENSES PER BOOKS	CHARI TABLE PURPOSES
PAYROLL TAXES FOREIGN TAXES EXCISE TAXES STATE FILING FEES		765. 1, 471. -8, 968. 5.	765 1, 471 5
	TOTALS	 -6, 727. ========	2, 241

FORM 990PF, PART I - OTHER EXPENSES

DESCRI PTI ON	REVENUE AND EXPENSES PER BOOKS	CHARI TABLE PURPOSES
MI SCELLANEOUS EXPENSE	820.	820.
ΤΟΤΑ	LS 820.	820.
	===========	===========

FORM 990PF, PART II - U.S. AND STATE OBLIGATIONS

DESCRI PTI ON		ENDI NG BOOK VALUE	ENDI NG FMV
SEE STATEMENT		616, 985.	619, 332.
Т	OTALS	616, 985. ============	619, 332.

FORM 990PF, PART II - CORPORATE STOCK

DESCRI PTI ON		ENDI NG BOOK VALUE	ENDI NG FMV
SEE STATEMENT		1, 939, 504.	3, 451, 383.
	TOTALS	1, 939, 504. ==========	3, 451, 383.

FORM 990PF, PART II - CORPORATE BONDS

ENDI NG BOOK VALUE	ENDI NG FMV
1, 422, 344.	1, 402, 114.
1, 422, 344.	1, 402, 114.
	BOOK VALUE 1, 422, 344.

FORM 990PF, PART II - OTHER ASSETS

DESCRI PTI ON	BEGI NNI NG BOOK VALUE	ENDI NG BOOK VALUE	ENDI NG FMV
ACCRUED INTEREST PURCHASED	NONE	6,788.	6, 788.
TOTALS	NONE	6, 788. ======	6, 788. ======

FORM 990PF, PART III - OTHER DECREASES IN NET WORTH OR FUND BALANCES

DESCRI PTI ON

AMOUNT

==========

BOOK/TAX DIFFERENCE

496. -----496.

TOTAL

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

NAME AND ADDRESS	TITLE AND TIME DEVOTED TO POSITION		CONTRI BUTI ONS TO EMPLOYEE BENEFIT PLANS	
WILLIAM REVELLE 1626 HINMAN AVENUE, #202 EVANSTON, IL 60201	PRESIDENT PART-TIME	NONE	NONE	NONE
CAROLYN HUFBAUER 1625 HINMAN AVENUE, #202 EVANSTON, IL 60201	VI CE-PRES PART-TI ME	NONE	NONE	NONE
MARY PACI 1625 HINMAN AVENUE, #202 EVANSTON, IL 60201	VI CE-PRES PART-TI ME	NONE	NONE	NONE
ETHELYN C. BOND 1625 HINMAN AVENUE, #202 EVANSTON, IL 60201	SECR/TREAS FULL-TIME	10, 000.	NONE	NONE
ELLEN REVELLE-ECKIS 1625 HINMAN AVENUE, #202 EVANSTON, IL 60201	DI RECTOR PART-TI ME	NONE	NONE	NONE
ELEANOR REVELLE 1625 HINMAN AVENUE, #202 EVANSTON, IL 60201	DI RECTOR PART-TI ME	NONE	NONE	NONE
	GRAND TOTALS	10, 000.	NONE	NONE

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR

	AND		
RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT

SEE ATTACHED STATEMENT 13

572, 234.

TOTAL CONTRIBUTIONS PAID 572, 234.

1

Department of the Treasury

Internal Revenue Service Name of estate or trust

Capital Gains and Losses

Attach to Form 1041 (or Form 5227). See the separate instructions for

Form 1041 (or Form 5227).

Employer identification number

NEW HORIZON FOUNDATION

2	6-	2 /	n	1	\mathbf{r}	\mathbf{n}	1
-51	n –	.54		n	/	92	ŧ.
~	<u> </u>	<u> </u>	~	~	_		•

Note: Form 5227 filers need to complete ONLY Parts I and II.

Par	Short-Term Cap	ital Gains an	d Losses - As	ssets Held One Yea	r or Less			
	(a) Description of property (Example, 100 shares 7% preferred of "Z" Co.)	(b) Date acquired (mo., day, yr.)	(c) Date sold (mo., day, yr.)	(d) Sales price	(e) Cost or other (see page 2		(f) GAIN or (LOSS) (col. (d) less col. (e))	
	SEE STATEMENT	1		618, 123.	578, 5	62.	39, 561.	
2	Short-term capital gain	or (loss) from	Forms 4684, 6	252, 6781, and 8824	$\bigcap_{i=1}^{n}$	2		
3	Net short-term gain or (lestates or trusts	oss) from partr	nerships, S cor	porations, and other		N 3		
4	Short-term capital loss of	carryover. Ente	r the amount, i	f any, from line 9 of th	е			
	1997 Capital Loss Carry	over Workshe	et			1 4	()	
5	Net short-term gain or here and on line 14 bel		e lines 1 throw	ah 4 in column (f) En	ter	5	39, 561.	

Long-Term Capital Gains and Losses - Assets Held More Than One Year Part II

	(a) Description of property (Example, 100 shares 7% preferred of "Z" Co.)	(b) Date acquired (mo., day, yr.)	(c) Date sold (mo., day, yr.)	(d) Sales price	(e) Cost or other (see page 2		(f) GAIN or (LOSS) (col. (d) less col. (e))	(g) 28% RATE GAIN or (LOSS) *(see instr. below)
6								
	SEE STATEMEN	Г 2		1, 364, 545.	970, 9	95.	393, 550.	
7	 Long-term capital gain 	or (loss) from	Forms 2439, 4	684, 6252, 6781, and	8824	7		
8	Net long-term gain or (loss) from partn	erships, S corp	orations, and other es	states or trusts	8		
g	Capital gain distribution	ns				9	849.	
10	Gain from Form 4797,	Part I				10		
11	Long-term capital loss	carryover. Ente	r in both colum	ns (f) and (g) the amo	unt,			
	if any, from line 14, of	the 1997 Capita	al Loss Carryov	er Worksheet		n 11	()	()
12						12		
13	Net long-term gain or	(loss). Combine	lines 6 throug	h 11 in column (f). En	ter			
	here and on line 15 be					13	394, 399.	

*28% Rate Gain or (Loss) includes all "collectibles gains and losses" (as defined on page 27 of the instructions) and up to 50% of the eligible gain on qualified small business stock (see page 25 of the instructions).

Par	t III Summary of Parts I and II		(1) Beneficiaries' (see page 27)	(2) Estate's or trust's	(3) Total
14	Net short-term gain or (loss) (from line 5 above)	4			39, 561.
15	Net long-term gain or (loss):				
а	28% rate gain or (loss) (from line 12 above)	5a			
b	Unrecaptured section 1250 gain (see worksheet on page 26)	5b			
с	Total for year (from line 13 above)	5c			394, 399.
16	Total net gain or (loss). Combine lines 14 and 15c	6			433, 960.
	Notes If line 40, activity (0) is a net active anten the active an Earny 40.44 line 4. If line				with the second

Note: If line 16, column (3), is a net gain, enter the gain on Form 1041, line 4. If lines 15c and 16, column (2) are net gains, go to Part V, and DO NOT complete Part IV. If line 16, column (3), is a net loss, complete Part IV and the Capital Loss Carryover Worksheet, as necessary.

For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

Schedule D (Form 1041) 1998

Sche	dule D (Form 1041) 1998				Page 2
Par	t IV Capital Loss Limitation				
17	Enter here and enter as a (loss) on Form 1041, line 4, the smaller of:				
	a The loss on line 16, column (3); or				
	b \$3,000			17 (
lf th	e loss on line 16, column (3) is more than \$3,000, OR if Form 1041, page 1, lir	ne 22, is a	loss, complete the	Capital I	Loss Carryover
Wo	ksheet on page 27 of the instructions to determine your capital loss carryover.			-	-
	Tax Computation Using Maximum Capital Gains Bates (Con		s part only if both	n lines 1	5c and
Par	16 in column (2) are gains, and Form 1041, line 22 is more th	an zero.)			
18	Enter taxable income from Form 1041, line 22			18	
19	Enter the smaller of line 15c or 16 in column (2)	19	394, 399.		
20	If you are filing Form 4952, enter the amount from Form 4952, line 4e	20	•		
21	Subtract line 20 from line 19. If zero or less, enter -0-	21	394, 399.		
22	Combine lines 14 and 15a, column (2). If zero or less, enter -0-	22	39, 561		
23	Enter the smaller of line 15a, column (2), or line 22, but not less than zero	23			
24	Enter the amount from line 15b, column (2)	24			
25	Add line 23 and 24	25			
26	Subtract line 25 from line 21. If zero or less, enter -0-			26	394, 399.
27	Subtract line 26 from line 18. If zero or less, enter -0-			27	
28	Enter the smaller of line 18 or \$1,700			28	
29	Enter the smaller of line 27 or line 28			29	
30	Subtract line 21 from line 18. If zero or less, enter -0-			30	
31	Enter the larger of line 29 or line 30			31	
• ·			-		
32	Tax on amount on line 31 from the 1998 Tax Rate Schedule			32	
33	Enter the amount from line 28			33	
34	Enter the amount from line 27			34	
35	Subtract line 34 from line 33. If zero or less, enter -0-			35	
36	Multiply line 35 by 10% (.10)			36	
37	Enter the smaller of line 18 or line 26		······································	N 37	
38	Enter the amount from line 35			38	
39	Subtract line 38 from line 37. If zero or less, enter -0-			39	
00			_		
40	Multiply line 39 by 20% (.20)			40	
41	Enter the smaller of line 21 or line 24		······································		
42	Add lines 21 and 31	42	394, 399.		
43	Enter the amount from line 18	43	0,1,0,,	-	
44	Subtract line 43 from line 42. If zero or less, enter -0-			44	394, 399.
44	Subtract line 44 from line 41. If zero or less, enter -0-			45	<u> </u>
4J					
46	Multiply line 45 by 25% (.25)			46	
46 47	Enter the amount from line 18			40	
47 48	Add lines 31, 35, 39, and 45			48	
40 49	Subtract line 48 from line 47			49	
43			_		
50	Multiply line 49 by 28% (.28)			50	
50 51	Add lines 32, 36, 40, 46, and 50			1 50	
51	Tax on the amount on line 18 from the 1998 Tax Rate Schedule			52	
JΖ					

53	Tax on taxable income (including capital gains). Enter the smaller of line 51 or line 52 here and success		
	on line 1a of Schedule G, Form 1041	53	

Schedule D Detail of Short-term Capital Gains and Losses

Description	Date Acquired VAR	Date Sold	Gross Sales	Cost or Other	Short-term
Description SEE ATTACHED SCHEDULE	VAR	VAR	Price 618, 123.	Basis 578, 562.	Gain/Loss 39, 561 .
SEE ATTACHED SCHEDOLL			010, 123.	570, 502.	57, 501.
			(10, 100		20 5/1
Totals			618, 123.	578, 562.	39, 561.

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Long-term Gain/Loss
20% MAX RATE CAPITAL GAINS (LOSSES)					
SEE ATACHED SCHEDULE	VAR	VAR	1, 364, 545.	970, 995.	393, 550.
TOTAL 20% MAX RATE CAPITAL GAINS (LOSSES)					393, 550.
Totals			1, 364, 545.	970, 995.	393, 550.

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