

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

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

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

OMB No 1545-0052  
**2018**  
**Open to Public Inspection**

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

Name of foundation THE MYRON STRATTON HOME		<b>A Employer identification number</b> 84-0404260	
% THE MYRON STRATTON HOME		<b>B Telephone number (see instructions)</b> (719) 579-0930	
Number and street (or P O box number if mail is not delivered to street address) Room/suite 555 GOLD PASS HEIGHTS		<b>C</b> If exemption application is pending, check here <input type="checkbox"/>	
City or town, state or province, country, and ZIP or foreign postal code COLORADO SPRINGS, CO 80906		<b>D 1.</b> Foreign organizations, check here <input type="checkbox"/> <b>2</b> Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
<b>G</b> 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		<b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
<b>H</b> Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		<b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
<b>I</b> Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ <u>196,543,863</u>		<b>J</b> Accounting method <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ <i>(Part I, column (d) must be on cash basis)</i>	

<b>Part I Analysis of Revenue and Expenses</b> <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions) )</i>		<b>(a)</b> Revenue and expenses per books	<b>(b)</b> Net investment income	<b>(c)</b> Adjusted net income	<b>(d)</b> Disbursements for charitable purposes (cash basis only)
<b>Revenue</b>	<b>1</b> Contributions, gifts, grants, etc., received (attach schedule)	402			
	<b>2</b> Check <input checked="" type="checkbox"/> if the foundation is <b>not</b> required to attach Sch B				
	<b>3</b> Interest on savings and temporary cash investments	43,994	43,994	43,994	
	<b>4</b> Dividends and interest from securities	2,611,778	2,611,778	2,611,778	
	<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	5,033,286			
	<b>b</b> Gross sales price for all assets on line 6a	21,482,942			
	<b>7</b> Capital gain net income (from Part IV, line 2)		5,033,286		
	<b>8</b> Net short-term capital gain			159,197	
	<b>9</b> Income modifications			400,000	
	<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)	5,301,020	4,088,222	5,301,020		
<b>12 Total.</b> Add lines 1 through 11	12,990,480	11,777,280	8,515,989		
<b>Operating and Administrative Expenses</b>	<b>13</b> Compensation of officers, directors, trustees, etc	241,185	33,309	33,309	207,876
	<b>14</b> Other employee salaries and wages	1,805,400	9,027	9,027	1,849,973
	<b>15</b> Pension plans, employee benefits	983,380	4,917	4,917	978,463
	<b>16a</b> Legal fees (attach schedule)	638	0	0	638
	<b>b</b> Accounting fees (attach schedule)	19,660	9,830	9,830	9,830
	<b>c</b> Other professional fees (attach schedule)	324,928	280,280	280,280	44,648
	<b>17</b> Interest				
	<b>18</b> Taxes (attach schedule) (see instructions)				
	<b>19</b> Depreciation (attach schedule) and depletion	816,475		816,475	
	<b>20</b> Occupancy				
	<b>21</b> Travel, conferences, and meetings	38,816			38,816
	<b>22</b> Printing and publications				
	<b>23</b> Other expenses (attach schedule)	1,310,677		232,015	1,507,404
	<b>24 Total operating and administrative expenses.</b> Add lines 13 through 23	5,541,159	337,363	1,385,853	4,637,648
	<b>25</b> Contributions, gifts, grants paid	413,500			372,000
<b>26 Total expenses and disbursements.</b> Add lines 24 and 25	5,954,659	337,363	1,385,853	5,009,648	
<b>27</b> Subtract line 26 from line 12					
<b>a Excess of revenue over expenses and disbursements</b>	7,035,821				
<b>b Net investment income</b> (if negative, enter -0-)		11,439,917			
<b>c Adjusted net income</b> (if negative, enter -0-)			7,130,136		

**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
<b>Assets</b>	<b>1</b> Cash—non-interest-bearing . . . . .	3,703	2,327	2,327
	<b>2</b> Savings and temporary cash investments . . . . .	6,225,176	8,892,766	8,892,766
	<b>3</b> Accounts receivable ▶ <u>1,068,388</u>			
	Less allowance for doubtful accounts ▶ _____	403,157	1,068,388	1,068,388
	<b>4</b> Pledges receivable ▶ _____			
	Less allowance for doubtful accounts ▶ _____			
	<b>5</b> Grants receivable . . . . .			
	<b>6</b> Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .			
	<b>7</b> Other notes and loans receivable (attach schedule) ▶ _____			
	Less allowance for doubtful accounts ▶ _____			
	<b>8</b> Inventories for sale or use . . . . .	24,366	26,032	26,032
	<b>9</b> Prepaid expenses and deferred charges . . . . .	49,616	64,724	64,724
	<b>10a</b> Investments—U S and state government obligations (attach schedule)			
	<b>b</b> Investments—corporate stock (attach schedule) . . . . .	69,936,980	60,457,887	60,457,887
	<b>c</b> Investments—corporate bonds (attach schedule) . . . . .	7,114,796	6,767,553	6,767,553
	<b>11</b> Investments—land, buildings, and equipment basis ▶ _____			
Less accumulated depreciation (attach schedule) ▶ _____				
<b>12</b> Investments—mortgage loans . . . . .				
<b>13</b> Investments—other (attach schedule) . . . . .	84,956,120	77,095,052	79,983,000	
<b>14</b> Land, buildings, and equipment basis ▶ <u>40,315,730</u>				
Less accumulated depreciation (attach schedule) ▶ <u>14,549,607</u>	23,997,740	25,766,123	38,089,848	
<b>15</b> Other assets (describe ▶ _____)	741,391	1,191,338	1,191,338	
<b>16 Total assets</b> (to be completed by all filers—see the instructions Also, see page 1, item I)	193,453,045	181,332,190	196,543,863	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses . . . . .	1,002,330	536,762	
	<b>18</b> Grants payable . . . . .	51,000	65,000	
	<b>19</b> Deferred revenue . . . . .			
	<b>20</b> Loans from officers, directors, trustees, and other disqualified persons			
	<b>21</b> Mortgages and other notes payable (attach schedule) . . . . .			
	<b>22</b> Other liabilities (describe ▶ _____)	945,658	655,709	
	<b>23 Total liabilities</b> (add lines 17 through 22) . . . . .	1,998,988	1,257,471	
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow SFAS 117, check here</b> <input checked="" type="checkbox"/> <b>and complete lines 24 through 26 and lines 30 and 31.</b>			
	<b>24</b> Unrestricted . . . . .	188,031,179	176,795,704	
	<b>25</b> Temporarily restricted . . . . .			
	<b>26</b> Permanently restricted . . . . .	3,422,878	3,279,015	
	<b>Foundations that do not follow SFAS 117, check here</b> <input type="checkbox"/> <b>and complete lines 27 through 31.</b>			
	<b>27</b> Capital stock, trust principal, or current funds . . . . .			
	<b>28</b> Paid-in or capital surplus, or land, bldg, and equipment fund			
<b>29</b> Retained earnings, accumulated income, endowment, or other funds				
<b>30 Total net assets or fund balances</b> (see instructions) . . . . .	191,454,057	180,074,719		
<b>31 Total liabilities and net assets/fund balances</b> (see instructions) .	193,453,045	181,332,190		

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

<b>1</b> 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) . . . . .	<b>1</b>	191,454,057
<b>2</b> Enter amount from Part I, line 27a . . . . .	<b>2</b>	7,035,821
<b>3</b> Other increases not included in line 2 (itemize) ▶ _____	<b>3</b>	458,769
<b>4</b> Add lines 1, 2, and 3 . . . . .	<b>4</b>	198,948,647
<b>5</b> Decreases not included in line 2 (itemize) ▶ _____	<b>5</b>	18,873,928
<b>6</b> Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	<b>6</b>	180,074,719

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

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co )	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)
<b>1 a</b> LT CAP GAIN ON SALE	P		
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

(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)
<b>a</b> 21,482,942		16,449,656	5,033,286
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
<b>a</b>			5,033,286
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

<b>2</b> Capital gain net income or (net capital loss)	2	5,033,286
<b>3</b> Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	3	159,197

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

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2017			
2016			
2015			
2014			
2013			

<b>2</b> Total of line 1, column (d)	2	
<b>3</b> 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	
<b>4</b> Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	
<b>5</b> Multiply line 4 by line 3	5	
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)	6	
<b>7</b> Add lines 5 and 6	7	
<b>8</b> Enter qualifying distributions from Part XII, line 4	8	

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

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

Table with 11 rows for excise tax calculations. Includes fields for exempt foundations, tax under section 511, subtitle A tax, and total credits/payments. Includes sub-tables 6a-6d for 2018 estimated tax payments.

Part VII-A Statements Regarding Activities

Table with 10 rows for activity statements. Columns include question text, 'Yes', and 'No' checkboxes. Questions cover political activities, unrelated business income, and asset requirements.

Part VII-A Statements Regarding Activities (continued)

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

Located at 555 GOLD HEIGHTS PASS COLORADO SPRINGS CO ZIP+4 80906

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here and enter the amount of tax-exempt interest received or accrued during the year.

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

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

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

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

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

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

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

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

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

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
CANDICE K HARVEY 555 GOLD PASS HEIGHTS COLORADO SPRINGS, CO 80906	BUSINESS MANAGER 40 0	89,320	48,987	0
LINDA BUENDORF 555 GOLD PASS HEIGHTS COLORADO SPRINGS, CO 80906	SENIOR SVCS DIRECTOR 40 0	97,289	24,391	0
MARGARET HUNTER 555 GOLD PASS HEIGHTS COLORADO SPRINGS, CO 80906	NURSING SUPERVISOR 40 0	81,003	24,050	0
RICK WHITE 555 GOLD PASS HEIGHTS COLORADO SPRINGS, CO 80906	DIR OF SPEC PRJCTS 40 0	81,557	10,896	0
SCOTT CRAWFORD 555 GOLD PASS HEIGHTS COLORADO SPRINGS, CO 80906	DIR OF MAINTENANCE 40 0	59,148	5,823	0
<b>Total</b> number of other employees paid over \$50,000.			<input type="checkbox"/>	

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

<b>3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".</b>		
<b>(a) Name and address of each person paid more than \$50,000</b>	<b>(b) Type of service</b>	<b>(c) Compensation</b>
H W Houston Construction 210 S VICTORIA AVE PUEBLO, CO 81003	Construction	2,180,956
Olson Plumbing 121 W Cucharras St COLORADO SPRINGS, CO 80903	Plumbing/Utilities	135,915
Colorado Springs Utilities 111 S Cascade Ave COLORADO SPRINGS, CO 80903	Utilities	312,312
Meritain Health 9605 S KINGSTON CT ENGLEWOOD, CO 80112	Health Plan Premiums	224,303
Dodge & Cox 555 California St SAN FRANCISCO, CA 94104	Investment Mgmt	120,904
<b>Total number of others receiving over \$50,000 for professional services.</b>		

**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
<b>1</b> ADULT SERVICES THE HOME PROVIDES RESIDENTIAL SERVICES TO OVER 100 ELDERLY PERSONS WITH LIMITED INCOME	4,555,983
<b>2</b> STRATTON CONSORTIUM THE HOME PROVIDES THE FREE USE OF FACILITIES FOR OTHER NONPROFIT ORGANIZATIONS WITH VARIOUS MISSIONS THAT PROVIDE SERVICES TO LOW INCOME RESIDENTS	453,665
<b>3</b>	
<b>4</b>	

**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
<b>1</b>	
<b>2</b>	
All other program-related investments See instructions	
<b>3</b>	

**Total.** Add lines 1 through 3

**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>1a</b>	165,005,756
<b>b</b>	Average of monthly cash balances.	<b>1b</b>	1,082,218
<b>c</b>	Fair market value of all other assets (see instructions).	<b>1c</b>	3,217,204
<b>d</b>	<b>Total</b> (add lines 1a, b, and c).	<b>1d</b>	169,305,178
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	<b>1e</b>	
<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>	169,305,178
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	<b>4</b>	2,539,578
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4.	<b>5</b>	166,765,600
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5.	<b>6</b>	8,338,280

**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>	
<b>2a</b>	Tax on investment income for 2018 from Part VI, line 5.	<b>2a</b>	
<b>b</b>	Income tax for 2018 (This does not include the tax from Part VI).	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b.	<b>2c</b>	
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1.	<b>3</b>	
<b>4</b>	Recoveries of amounts treated as qualifying distributions.	<b>4</b>	
<b>5</b>	Add lines 3 and 4.	<b>5</b>	
<b>6</b>	Deduction from distributable amount (see instructions).	<b>6</b>	
<b>7</b>	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	<b>7</b>	

**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>1a</b>	5,009,648
<b>b</b>	Program-related investments—total from Part IX-B.	<b>1b</b>	0
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	<b>2</b>	2,805,210
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the		
<b>a</b>	Suitability test (prior IRS approval required).	<b>3a</b>	0
<b>b</b>	Cash distribution test (attach the required schedule).	<b>3b</b>	0
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	<b>4</b>	7,814,858
<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</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4.	<b>6</b>	7,814,858

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



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

	(a) Corpus	(b) Years prior to 2017	(c) 2017	(d) 2018
<b>1</b> Distributable amount for 2018 from Part XI, line 7				0
<b>2</b> Undistributed income, if any, as of the end of 2018				
<b>a</b> Enter amount for 2017 only. . . . .			0	
<b>b</b> Total for prior years 2016, 2015, 2014		0		
<b>3</b> Excess distributions carryover, if any, to 2018				
<b>a</b> From 2013. . . . .				
<b>b</b> From 2014. . . . .				
<b>c</b> From 2015. . . . .				
<b>d</b> From 2016. . . . .				
<b>e</b> From 2017. . . . .				0
<b>f</b> Total of lines 3a through e. . . . .	0			
<b>4</b> Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ <u>7,814,858</u>				
<b>a</b> Applied to 2017, but not more than line 2a			0	
<b>b</b> Applied to undistributed income of prior years (Election required—see instructions). . . . .				
<b>c</b> Treated as distributions out of corpus (Election required—see instructions). . . . .				
<b>d</b> Applied to 2018 distributable amount. . . . .				
<b>e</b> Remaining amount distributed out of corpus	7,814,858			
<b>5</b> Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a) )				
<b>6</b> Enter the net total of each column as indicated below:	7,814,858			
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5	7,814,858			
<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. . . . .				
<b>d</b> Subtract line 6c from line 6b Taxable amount—see instructions . . . . .		0		
<b>e</b> Undistributed income for 2017 Subtract line 4a from line 2a Taxable amount—see instructions . . . . .			0	
<b>f</b> Undistributed income for 2018 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2019 . . . . .				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). . . . .				
<b>8</b> Excess distributions carryover from 2013 not applied on line 5 or line 7 (see instructions). . . . .				
<b>9</b> Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a . . . . .	0			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2014. . . . .				
<b>b</b> Excess from 2015. . . . .				
<b>c</b> Excess from 2016. . . . .				
<b>d</b> Excess from 2017. . . . .				
<b>e</b> Excess from 2018. . . . .				0

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

**1a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2018, enter the date of the ruling. . . . . 1991-07-02

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

	Tax year				(e) Total
	(a) 2018	(b) 2017	(c) 2016	(d) 2015	
<b>2a</b> Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed . . . . .	7,130,136	3,842,503	3,261,129	2,294,894	16,528,662
<b>b</b> 85% of line 2a . . . . .	6,060,616	3,266,128	2,771,960	1,950,660	14,049,364
<b>c</b> Qualifying distributions from Part XII, line 4 for each year listed . . . . .	7,814,858	7,355,692	4,475,346	6,464,918	26,110,814
<b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities . . . . .	372,000	326,000	260,100	280,000	1,238,100
<b>e</b> Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c . . . . .	7,442,858	7,029,692	4,215,246	6,184,918	24,872,714
<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 . . . . .	0	0	0	0	0
<b>(2)</b> Value of assets qualifying under section 4942(j)(3)(B)(i)					0
<b>b</b> "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . . . .	5,558,853	5,392,403	4,757,062	4,951,107	20,659,425
<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) . . . . .					0
<b>(2)</b> Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . . .					0
<b>(3)</b> Largest amount of support from an exempt organization					0
<b>(4)</b> Gross investment income					0

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

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

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

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

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

**a** The name, address, and telephone number or e-mail address of the person to whom applications should be addressed  
 THE MYRON STRATTON HOME  
 555 GOLD PASS HEIGHTS  
 COLORADO SPRINGS, CO 80906  
 (719) 579-0930

**b** The form in which applications should be submitted and information and materials they should include  
 HOME NO PRESCRIBED FORMS GRANTS CONTACT DANIEL O'REAR AT 719-579-0930

**c** Any submission deadlines  
 HOME NONE GRANTS MAY 1 AND NOVEMBER 1

**d** Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors  
 HOME APPLICANTS MUST HAVE DEMONSTRATED NEED GRANTS APPLICANTS MUST HAVE DEMONSTRATED NEED

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

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





(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
DANIEL O'REAR 555 GOLD PASS HEIGHTS COLORADO SPRINGS, CO 80906	EXECUTIVE DIRECTOR 40 0	156,185	33,394	0
JON MEDVED 555 GOLD PASS HEIGHTS COLORADO SPRINGS, CO 80906	PRESIDENT 3 0	24,000	0	0
NECHIE HALL 555 GOLD PASS HEIGHTS COLORADO SPRINGS, CO 80906	Retired April 2018 1 5	4,000	0	0
LEONARD A FARR 555 GOLD PASS HEIGHTS COLORADO SPRINGS, CO 80906	Trustee 1 5	12,000	0	0
C DAVID MCDERMOTT 555 GOLD PASS HEIGHTS COLORADO SPRINGS, CO 80906	Vice President 1 5	12,000	0	0
THOMAS J NAUGHTON 555 GOLD PASS HEIGHTS COLORADO SPRINGS, CO 80906	Secretary/Treasurer 1 5	12,000	0	0
Meredith Vaughan 555 GOLD PASS HEIGHTS COLORADO SPRINGS, CO 80906	Trustee 1 5	11,000	0	0
Stephen D Woodford 555 GOLD PASS HEIGHTS COLORADO SPRINGS, CO 80906	Trustee 1 5	10,000	0	0

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
Care and Share Food Bank of CS 2605 Preamble Pt Colorado Springs, CO 80915	NONE	PC	Program Support Children's Nutrition Initiative	10,000
Kidpower of Colorado 10 Boulder Crescent Ste 100 Colorado Springs, CO 80903	NONE	PC	Program Support Safety Skills Workshops	7,500
Children's Literacy Center 2928 Strauss Ln Ste 100 Colorado Springs, CO 80907	NONE	PC	PROGRAM SUPPORT provide one-on-one literacy tutoring to under performing students	12,500
<b>Total . . . . .</b>				<b>372,000</b>

▶ **3a**

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a</b> <i>Paid during the year</i>				
Lutheran Family Services Rocky Mnt 363 S Harlan St Denver, CO 80226	NONE	PC	PROGRAM SUPPORT Respite Care Programs	15,000
Pikes Peak Therapeutic Riding Center 13620 Halleluah Trail Elbert, CO 80106	NONE	PC	PROGRAM SUPPORT Equine Assisted Activities and Therapy	7,500
Westside Cares 2808 W Colorado Ave Colorado Springs, CO 80904	NONE	PC	PROGRAM SUPPORT Compassionate Emergency Services Program	15,000
<b>Total . . . . .</b>				372,000



**3a**



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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
Ecumenical Social Ministries 201 N Weber St Colorado Springs, CO 80903	NONE	PC	PROGRAM SUPPORT Food Pantry	15,000
Pikes Peak Habitat for Humanity 2802 N Prospect St Colorado Springs, CO 80907	NONE	PC	PROGRAM SUPPORT Home Building & Rehabilitation Program	10,000
The Home Front Cares PO Box 38516 Colorado Springs, CO 80937	NONE	PC	PROGRAM SUPPORT one-time emergency financial assistance for housing, utilities, food, and transportation	15,000
<b>Total . . . . .</b>				<b>372,000</b>

▶ **3a**

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
Pikes Peak Community College Fndtn 5765 S Academy Blvd Colorado Springs, CO 80906	NONE	PC	PROGRAM SUPPORT Teen College Program	7,500
Discover Goodwill of SW CO 1460 Garden of the Gods Rd Colorado Springs, CO 80907	NONE	PC	PROGRAM SUPPORT Fresh Start Laundry Case Manager	15,000
YMCA of PPR316 N Tejon St Colorado Springs, CO 80903	NONE	PC	PROGRAM SUPPORT 7th Grade Initiative	20,000
<b>Total . . . . .</b>				<b>372,000</b>

▶ **3a**

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a</b> <i>Paid during the year</i>				
Dream Centers of CS 11025 Voyager Pkwy Colorado Springs, CO 80921	NONE	PC	PROGRAM SUPPORT Mary's Home-assist homeless families by providing holistic care	20,000
Catholic Health Initiatives 2222 N Nevada Av Colorado Springs, CO 80907	NONE	PC	PROGRAM SUPPORT support Teller County Dental childcare for low income children	7,500
Atlas Preparatory School 1602 S Murray Blvd Colorado Springs, CO 80916	NONE	PC	PROGRAM SUPPORT College Pathway Program	70,000
<b>Total . . . . .</b>				372,000



**3a**

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
CASA of the Pikes Peak Region 701 S Cascade Ave Colorado Springs, CO 80903	NONE	PC	PROGRAM SUPPORT support capital campaign-contingent on pledges/cash raised \$620,000	25,000
Teller Senior Coalition 750 E Hwy 24 Bldg 2 Ste 100 Woodland Park, CO 80866	NONE	PC	PROGRAM SUPPORT General Operating Support	10,000
Disability Services3660 N Academy Blvd Colorado Springs, CO 80918	NONE	PC	PROGRAM SUPPORT specialized transportation services	10,000
<b>Total . . . . .</b>				<b>372,000</b>

▶ **3a**

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a</b> <i>Paid during the year</i>				
Pueblo Cooperative Care Center 326 W 8th St Pueblo, CO 81003	NONE	PC	PROGRAM SUPPORT Food Sack Program	15,000
Colo Springs Philharmonic Orchestra PO Box 1266 Colorado Springs, CO 80901	NONE	PC	PROGRAM SUPPORT Philharmonic Kids program	6,000
Big BrothersBig Sisters of Colorado 111 S Tejon St Ste 302 Colorado Springs, CO 80903	NONE	PC	PROGRAM SUPPORT youth mentoring programs	10,000
<b>Total . . . . .</b> ▶ <b>3a</b>				372,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
Beautiful Redemption PO Box 33 Palmer Lake, CO 80133	NONE	PC	PROGRAM SUPPORT adaption outreach program	5,000
Project Angel Heart 4950 Washington St Denver, CO 80216	NONE	PC	PROGRAM SUPPORT critically ill seniors home meals delivery	20,000
Colo Springs Food Rescue 917 E Moreno Ave Colorado Springs, CO 80903	NONE	PC	PROGRAM SUPPORT no-cost grocery program	7,500
<b>Total . . . . . ▶ 3a</b>				372,000

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
Diakonia 2630 Rossmere St Colorado Springs, CO 80919	NONE	PC	PROGRAM SUPPORT community preschool program	10,000
Fostering Hope Foundation 111 S Tejon St Ste 112 Colorado Springs, CO 80903	NONE	PC	PROGRAM SUPPORT support foster families in the Pikes Peak Regio Grants to this organization would be dependent upon the appointment of a board member outside the current "family unit the preparation of audited financial statements)	6,000
<b>Total . . . . .</b> ▶ <b>3a</b>				372,000

**TY 2018 Accounting Fees Schedule****Name:** THE MYRON STRATTON HOME**EIN:** 84-0404260

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
ACCOUNTING FEES	19,660	9,830	9,830	9,830



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**As Filed Data -**

**DLN: 93491176001129**

# **TY 2018 Cash Distribution Explanation Statement**

**Name:** THE MYRON STRATTON HOME

**EIN:** 84-0404260

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

## **TY 2018 Depreciation Schedule**

**Name:** THE MYRON STRATTON HOME

**EIN:** 84-0404260

**TY 2018 Investments Corporate Bonds Schedule****Name:** THE MYRON STRATTON HOME**EIN:** 84-0404260**Investments Corporate Bonds Schedule**

Name of Bond	End of Year Book Value	End of Year Fair Market Value
BOND MUTUAL FUNDS	6,767,553	6,767,553

**TY 2018 Investments Corporate Stock Schedule****Name:** THE MYRON STRATTON HOME**EIN:** 84-0404260**Investments Corporation Stock Schedule**

<b>Name of Stock</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
CORPORATE STOCK	23,691,035	23,691,035
EQUITY MUTUAL FUNDS	36,766,852	36,766,852

**TY 2018 Investments - Other Schedule****Name:** THE MYRON STRATTON HOME**EIN:** 84-0404260**Investments Other Schedule 2**

<b>Category/ Item</b>	<b>Listed at Cost or FMV</b>	<b>Book Value</b>	<b>End of Year Fair Market Value</b>
OIL & GAS ROYALTIES		35,660	2,923,608
ALTERNATIVE INVESTMENTS		77,059,392	77,059,392

**TY 2018 Legal Fees Schedule****Name:** THE MYRON STRATTON HOME**EIN:** 84-0404260

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
LEGAL FEES	638			638

**TY 2018 Other Assets Schedule****Name:** THE MYRON STRATTON HOME**EIN:** 84-0404260**Other Assets Schedule**

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
INTEREST & DIVIDEND RECEIVABLE	22,002	24,931	24,931
ACCRUED ROYALTIES RECEIVABLE	319,389	1,166,407	1,166,407
CASA PROMISORY NOTE	400,000	0	0

**TY 2018 Other Decreases Schedule****Name:** THE MYRON STRATTON HOME**EIN:** 84-0404260

<b>Description</b>	<b>Amount</b>
DONATED USE OF FACILITIES EXPENSE	168,820
UNREALIZED LOSS	18,705,108



**TY 2018 Other Expenses Schedule****Name:** THE MYRON STRATTON HOME**EIN:** 84-0404260**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
WORKERS COMP	59,076			78,401
EMPLOYEE RELATIONS	6,162			8,178
INSURANCE	148,026		37,846	158,602
DUES & SUBSCRIPTIONS	9,250			12,276
OFFICE EXPENSE	53,869			71,490
TELEPHONE	12,305			16,330
HOUSEKEEPING	91,327			121,201
MARKETING	14,500			19,243
UTILITIES	309,106		105,863	304,356
REPAIRS & MAINTENANCE	210,134		88,306	190,566

**Other Expenses Schedule**

<b>Description</b>	<b>Revenue and Expenses per Books</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
RECREATION	19,419			25,771
EDEN ALTERNATIVE	3,752			4,979
DIETARY	160,245			212,664
CONTRACT SERVICES	149,947			198,997
CONTRIBUTIONS	1,236			1,640
MISCELLANEOUS	6,514			8,645
CHARITABLE DIST UNDER PLR	55,000			72,991
GAS & FUEL TAX	809			1,074

**TY 2018 Other Income Schedule****Name:** THE MYRON STRATTON HOME**EIN:** 84-0404260**Other Income Schedule**

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
ROYALTY FEES	4,087,402	4,087,402	4,087,402
STOCK LITIGATION SETTLEMENT	820	820	820
HOME OPERATING REVENUES	980,783		980,783
UTILITY REIMBURSEMENT	105,863		105,863
OTHER REIMBURSEMENT	122,805		122,805
Miscellaneous	3,347		3,347

**TY 2018 Other Increases Schedule****Name:** THE MYRON STRATTON HOME**EIN:** 84-0404260

<b>Description</b>	<b>Amount</b>
DONATED USE OF FACILITIES INCOME	458,769

**TY 2018 Other Liabilities Schedule****Name:** THE MYRON STRATTON HOME**EIN:** 84-0404260

<b>Description</b>	<b>Beginning of Year - Book Value</b>	<b>End of Year - Book Value</b>
PROMISES TO GIVE - CONSORTIUM	945,658	655,709

**TY 2018 Other Professional Fees Schedule****Name:** THE MYRON STRATTON HOME**EIN:** 84-0404260

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
INVESTMENT FEES	280,280	280,280	280,280	0
CONSULTING FEES	44,648			44,648