

Department of the Treasury
Internal Revenue Service

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 for instructions and the latest information.

Open to Public Inspection

For calendar year **2017** or tax year beginning , **2017**, and ending , **20**

Name of foundation WHOLE PLANET FOUNDATION		A Employer identification number 20-2376273
Number and street (or P.O. box number if mail is not delivered to street address) 550 BOWIE STREET	Room/suite	B Telephone number (see instructions) (512) 542-0959
City or town, state or province, country, and ZIP or foreign postal code AUSTIN, TX 78703		C If exemption application is pending, check here. <input type="checkbox"/>
G Check all that apply:		D 1. Foreign organizations, check here. <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation. <input type="checkbox"/>
<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		E If private foundation status was terminated under section 507(b)(1)(A), check here. <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here. <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 10,192,542.	J Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)	

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)				
Revenue				
1 Contributions, gifts, grants, etc., received (attach schedule)	8,453,768.			
2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B.				
3 Interest on savings and temporary cash investments.	10,453.	10,453.	10,453.	ATCH 1
4 Dividends and interest from securities	133,849.	133,849.	133,849.	ATCH 2
5a Gross rents				
b Net rental income or (loss) _____				
6a Net gain or (loss) from sale of assets not on line 10	64,047.			
b Gross sales price for all assets on line 6a 64,047.				
7 Capital gain net income (from Part IV, line 2)		64,047.		
8 Net short-term capital gain.				
9 Income modifications				
10a Gross sales less returns and allowances				
b Less: Cost of goods sold				
c Gross profit or (loss) (attach schedule)				
11 Other income (attach schedule)				
12 Total. Add lines 1 through 11	8,662,117.	208,349.	144,302.	
Operating and Administrative Expenses				
13 Compensation of officers, directors, trustees, etc.	0.			
14 Other employee salaries and wages	1,043,582.			1,043,582.
15 Pension plans, employee benefits	236,511.			236,511.
16a Legal fees (attach schedule) <u>ATCH 3</u>	13,348.			13,348.
b Accounting fees (attach schedule) <u>ATCH 4</u>	67,869.			67,869.
c Other professional fees (attach schedule) <u>[5]</u>	262,794.			262,794.
17 Interest				
18 Taxes (attach schedule) (see instructions).				
19 Depreciation (attach schedule) and depletion	893.			
20 Occupancy	6,521.			6,521.
21 Travel, conferences, and meetings	75,860.			75,860.
22 Printing and publications				
23 Other expenses (attach schedule) <u>ATCH 6</u>	287,553.			287,553.
24 Total operating and administrative expenses. Add lines 13 through 23.	1,994,931.			1,994,038.
25 Contributions, gifts, grants paid	6,341,079.			6,341,079.
26 Total expenses and disbursements. Add lines 24 and 25	8,336,010.	0.	0.	8,335,117.
27 Subtract line 26 from line 12:				
a Excess of revenue over expenses and disbursements	326,107.			
b Net investment income (if negative, enter -0-)		208,349.		
c Adjusted net income (if negative, enter -0-)			144,302.	

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			
	2 Savings and temporary cash investments	1,647,563.	2,143,111.	2,143,111.
	3 Accounts receivable ▶ 11,000.			
	Less: allowance for doubtful accounts ▶	11,000.	11,000.	11,000.
	4 Pledges receivable ▶ 2,818,708.			
	Less: allowance for doubtful accounts ▶	2,436,619.	2,818,708.	2,818,708.
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶			
	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)			
	c Investments - corporate bonds (attach schedule)			
	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 ▶ 71,414.				
Less: accumulated depreciation (attach schedule) ▶ 71,364.	942.	50.	50.	
15 Other assets (describe ▶ ATCH 7)	4,733,362.	5,219,673.	5,219,673.	
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	8,829,486.	10,192,542.	10,192,542.	
Liabilities	17 Accounts payable and accrued expenses	90.	90.	
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons . .			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶ ATCH 8)	16,004.	49,188.	
	23 Total liabilities (add lines 17 through 22)	16,094.	49,278.	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here <input checked="" type="checkbox"/> X			
	and complete lines 24 through 26, and lines 30 and 31.			
	24 Unrestricted	7,647,796.	8,911,264.	
	25 Temporarily restricted	1,165,596.	1,232,000.	
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/>			
	and complete lines 27 through 31.			
	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 . .				
30 Total net assets or fund balances (see instructions)	8,813,392.	10,143,264.		
31 Total liabilities and net assets/fund balances (see instructions)	8,829,486.	10,192,542.		

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	8,813,392.
2 Enter amount from Part I, line 27a	2	326,107.
3 Other increases not included in line 2 (itemize) ▶ ATCH 9	3	1,003,765.
4 Add lines 1, 2, and 3	4	10,143,264.
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	10,143,264.

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 shs. MLC Co.)		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1 a SEE PART IV SCHEDULE				
b				
c				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a				
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.				(i) 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				
b				
c				
d				
e				
2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }		2 64,047.
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	{ If gain, also enter in Part I, line 8, column (c). See instructions. If (loss), enter -0- in Part I, line 8 }		3 0.

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.

1 Enter the appropriate amount in each column for each year; see the 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))
2016	12,049,100.	11,104,093.	1.085104
2015	12,218,111.	12,908,444.	0.946521
2014	11,736,689.	14,156,930.	0.829042
2013	10,887,218.	12,369,638.	0.880157
2012	9,023,285.	9,111,598.	0.990308
2	Total of line 1, column (d)	2	4.731132
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	0.946226
4	Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	4	11,036,004.
5	Multiply line 4 by line 3.	5	10,442,554.
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	2,083.
7	Add lines 5 and 6.	7	10,444,637.
8	Enter qualifying distributions from Part XII, line 4. 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.	8	8,335,117.

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, domestic foundations, tax under section 511, add lines 1 and 2, subtitle A tax, tax based on investment income, credits/payments (6a-6d), total credits, penalty, tax due, overpayment, and amount of line 10 to be credited to 2018 estimated tax.

Part VII-A Statements Regarding Activities

Table with 10 rows for activity statements. Includes questions about influencing legislation, political purposes, Form 1120-POL filing, political expenditures, reimbursement, IRS reporting, unrelated business income, liquidation, section 508(e) requirements, assets, states reported to, Form 990-PF distribution, private operating foundation status, and substantial contributors.

Part VII-A Statements Regarding Activities (continued)

Table with 3 columns: Question, Yes, No. Rows 11-16 containing questions about controlled entities, distributions, public inspection requirements, and foreign interests.

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.

Table with 3 columns: Question, Yes, No. Rows 1a-4b containing questions about disqualifying acts, taxes on failure to distribute income, and business enterprise interests.

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

5a	During the year, did the foundation pay or incur any amount to:		Yes	No
(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 checked="" type="checkbox"/>	Yes	<input type="checkbox"/> No
(5)	Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	<input type="checkbox"/>	Yes	<input checked="" type="checkbox"/> No
b	If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions.		5b	X
	Organizations relying on a current notice regarding disaster assistance, check here	<input type="checkbox"/>		
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? If "Yes," attach the statement required by Regulations section 53.4945-5(d).	<input checked="" type="checkbox"/>	Yes	<input type="checkbox"/> No
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/>	Yes	<input checked="" type="checkbox"/> No
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870.		6b	X
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/>	Yes	<input checked="" type="checkbox"/> No
b	If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?		7b	

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
ATCH 12		0.	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
ATCH 13		669,948.	23,970.	0.

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

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
ATCH 14		243,600.
Total number of others receiving over \$50,000 for professional services		▶

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 THE FOUNDATION PARTNERS WITH EXISTING CHARITABLE ORGANIZATIONS THAT MANAGE MICRO-CREDIT PROJECTS TO HELP FAMILIES ESCAPE POVERTY BY PROVIDING ACCESS TO CAPITAL THAT THEY CAN USE TO START THEIR OWN SMALL BUSINESSES. FUNDS IN 2017 SUPPORTED AN EXPANSION OF THE MICROLENDING PROGRAMS IN 71 COUNTRIES, INCLUDING THE UNITED STATES, AND SPANNING MULTIPLE CONTINENTS INCLUDING AFRICA, ASIA, NORTH AMERICA, AND SOUTH AMERICA. AS OF DECEMBER 31, 2017, OUR PROJECTS HAVE FUNDED OVER 2,618,000 LOANS AND HAVE DISBURSED OVER \$570 MILLION IN GRANTS.	8,336,010.

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 NONE	
2	
All other program-related investments. See instructions.	
3 NONE	
Total. Add lines 1 through 3	▶

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	4,577,630.
b	Average of monthly cash balances	1b	3,768,779.
c	Fair market value of all other assets (see instructions).	1c	2,857,656.
d	Total (add lines 1a, b, and c)	1d	11,204,065.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	11,204,065.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	168,061.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	11,036,004.
6	Minimum investment return. Enter 5% of line 5	6	551,800.

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

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

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	8,335,117.
b	Program-related investments - total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	8,335,117.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions	5	2,083.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	8,333,034.

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
1 Distributable amount for 2017 from Part XI, line 7				0.
2 Undistributed income, if any, as of the end of 2017:				
a Enter amount for 2016 only.				
b Total for prior years: 20 <u>15</u> , 20 <u>14</u> , 20 <u>13</u>				
3 Excess distributions carryover, if any, to 2017:				
a From 2012				
b From 2013				
c From 2014				
d From 2015				
e From 2016				
f Total of lines 3a through e				
4 Qualifying distributions for 2017 from Part XII, line 4: ▶ \$ _____				
a Applied to 2016, but not more than line 2a				
b Applied to undistributed income of prior years (Election required - see instructions).				
c Treated as distributions out of corpus (Election required - see instructions)				
d Applied to 2017 distributable amount.				
e Remaining amount distributed out of corpus.				
5 Excess distributions carryover applied to 2017 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
b Prior years' undistributed income. Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b. Taxable amount - see instructions				
e Undistributed income for 2016. Subtract line 4a from line 2a. Taxable amount - see instructions				
f Undistributed income for 2017. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2018.				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)				
8 Excess distributions carryover from 2012 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a		0.		
10 Analysis of line 9:				
a Excess from 2013				
b Excess from 2014				
c Excess from 2015				
d Excess from 2016				
e Excess from 2017				

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

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 **07/25/2007**

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	
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	144,302.	141,065.	130,602.	203,120.	619,089.
b 85% of line 2a	122,657.	119,905.	111,012.	172,652.	526,226.
c Qualifying distributions from Part XII, line 4 for each year listed	8,335,117.	12,050,867.	12,220,045.	11,736,689.	44,342,718.
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c	8,335,117.	12,050,867.	12,220,045.	11,736,689.	44,342,718.
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test - enter:					
(1) Value of all assets	10,192,542.	8,829,486.	12,070,166.	12,993,770.	44,085,964.
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)	10,192,542.	8,829,486.	12,070,166.	12,993,770.	44,085,964.
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed	367,867.	370,136.	430,281.	471,898.	1,640,182.
c "Support" alternative test - enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)	8,453,768.	8,427,618.	11,023,856.	13,597,095.	41,502,337.
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)	5,930,413.	5,893,360.	8,828,740.	10,305,816.	30,958,329.
(3) Largest amount of support from an exempt organization					
(4) Gross investment income	208,349.	170,686.	258,899.	203,120.	841,054.

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).)

N/A

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.

N/A

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:

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

c Any submission deadlines:

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

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
a Paid during the year				
ATCH 15				
Total				▶ 3a 6,341,079.
b Approved for future payment				
ATCH 16				
Total				▶ 3b 4,557,133.

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

Table with 5 main columns: (a) Business code, (b) Amount, (c) Exclusion code, (d) Amount, (e) Related or exempt function income. Rows include: 1 Program service revenue (a-f), 2 Membership dues and assessments, 3 Interest on savings and temporary cash investments, 4 Dividends and interest from securities, 5 Net rental income or (loss) from real estate (a-b), 6 Net rental income or (loss) from personal property, 7 Other investment income, 8 Gain or (loss) from sales of assets other than inventory, 9 Net income or (loss) from special events, 10 Gross profit or (loss) from sales of inventory, 11 Other revenue (a-e), 12 Subtotal, 13 Total.

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Table with 2 columns: Line No. and Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)

Part XVII Information Regarding Transfers to and Transactions and Relationships With Noncharitable Exempt Organizations

- 1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?
a Transfers from the reporting foundation to a noncharitable exempt organization of:
(1) Cash
(2) Other assets
b Other transactions:
(1) Sales of assets to a noncharitable exempt organization
(2) Purchases of assets from a noncharitable exempt organization
(3) Rental of facilities, equipment, or other assets
(4) Reimbursement arrangements
(5) Loans or loan guarantees
(6) Performance of services or membership or fundraising solicitations
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees
d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.

Table with columns Yes and No, and rows for items 1a(1), 1a(2), 1b(1), 1b(2), 1b(3), 1b(4), 1b(5), 1b(6), and 1c.

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

- 2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527?
b If "Yes," complete the following schedule.

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

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Sign Here

Signature of officer or trustee, Date, Title

May the IRS discuss this return with the preparer shown below? See instructions. Yes No

Paid Preparer Use Only

Print/Type preparer's name, Preparer's signature, Date, Check self-employed, PTIN, Firm's name, Firm's address, Firm's EIN, Phone no.

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

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj. basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		TOTAL LONG-TERM CAPITAL GAIN DIVIDENDS					64,047.	
TOTAL GAIN(LOSS)							<u>64,047.</u>	

Schedule of Contributors

2017

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

Name of the organization WHOLE PLANET FOUNDATION	Employer identification number 20-2376273
--	---

Organization type (check one):

Filers of:

Section:

- Form 990 or 990-EZ 501(c)() (enter number) organization
- 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
- 527 political organization
- Form 990-PF 501(c)(3) exempt private foundation
- 4947(a)(1) nonexempt charitable trust treated as a private foundation
- 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

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

Special Rules

- For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3 % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000; or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year ▶ \$ _____

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

Name of organization **WHOLE PLANET FOUNDATION**

Employer identification number
20-2376273

Part I **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	WHOLE FOODS MARKET SERVICES, INC. 550 BOWIE STREET AUSTIN, TX 78703	\$ 2,523,355.	Person <input checked="" type="checkbox"/> Payroll <input checked="" type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions.)
2	LATE JULY 3166 MAIN STREET BARNSTABLE, MA 02630	\$ 10,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
3	CAFE SPICE, ZAIKA FLAVORS OF INDIA 677 LITTLE BRITAIN ROAD NEW WINDSOR, NY 12553	\$ 8,333.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
4	GARDEN OF LIFE 5500 VILLAGE BLVD, STE 202 WEST PALM BEACH, FL 33407	\$ 10,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
5	GUAYAKI 6782 SEBASTOPOL AVENUE SEBASTOPOL, CA 95472	\$ 10,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
6	VAN'S INTERNATIONAL 3285 EAST VERNON AVENUE VERNON, CA 90058	\$ 9,761.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization **WHOLE PLANET FOUNDATION**Employer identification number
20-2376273**Part I** Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
7	ALLEGRO COFFEE 12799 CLAUDE COURT THORTON, CO 80241	\$ 67,395.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
8	HAIN CELESTIAL GROUP 58 SOUTH SERVICE ROAD, SUITE 250 MELVILLE, NY 11747	\$ 52,500.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
9	FRONTIER 3021 78TH ST NORWAY, IA 52318	\$ 100,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
10	NAKED JUICE 1333 S MAYFLOWER AVE STE 100 MONROVIA, CA 91016	\$ 100,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
11	AMERICAN TELECON 3280 PEACHTREE ROAD NE, SUITE 1000 ATLANTA, GA 30305	\$ 7,174.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
12	VITA COCO 38 W 21ST, 11TH FLOOR NEW YORK, NY 10010	\$ 15,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization **WHOLE PLANET FOUNDATION**Employer identification number
20-2376273**Part I** Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
13	CEDARS MEDITERRANEAN 50 FOUNDATION AVENUE WARD HILL, MA 01835	\$ 6,922.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
14	GREYSTON BAKERY 104 ALEXANDER ST YONKERS, NY 10701	\$ 20,764.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
15	NORSELAND INC 3 PARKLANDS DRIVE DARIEN, CT 06820	\$ 17,905.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
16	PAPYRUS THE DOMAIN, 3400 ESPERANZA CROSSING AUSTIN, TX 78758	\$ 100,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
17	SMUCKERS 1 STRAWBERRY LANE ORRVILLE, OH 44667	\$ 50,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
18	HI BALL INC 1862 UNION STREET SAN FRANCISCO, CA 94123	\$ 6,821.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization **WHOLE PLANET FOUNDATION**Employer identification number
20-2376273**Part I** Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
19	CROFTERS 7 GREAT NORTH RD PARRY SOUND ONTARIO CANADA P2A 2X8	\$ 10,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
20	JUSTIN'S NUT BUTTER LLC 736 PEARL STREET BOULDER, CO 80302	\$ 8,200.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
21	SHOES FOR CREWS 3977 S MARYLAND PKWY LAS VEGAS, NV 89119	\$ 39,169.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
22	SURYA BRAZIL 1327 SECOND AVENUE NEW HYDE PARK, NY 11040	\$ 75,663.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
23	CHICAGO BAR COMPANY LLC 412 N WELLS CHICAGO, ID 60654	\$ 7,058.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
24	CHOBANI, LLC 147 STATE HIGHWAY 320 NORWICH, NY 13815	\$ 100,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization WHOLE PLANET FOUNDATIONEmployer identification number
20-2376273**Part I** **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
25	CONAGRA BRANDS 222 W. MERCHANDISE MART PLAZA, SUITE 130 CHICAGO, IL 60654	\$ 50,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
26	EMMY'S ORGANICS, INC. 629 WEST BUFFALO ST. ITHACA, NY 14850	\$ 10,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
27	HIGH BREW COFFEE 2810 S. 1ST STREET AUSTIN, TX 78704	\$ 12,500.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
28	NUUN & COMPANY, INC. 800 MAYNARD AVE. SOUTH, SUITE 102 SEATTLE, WA 98134	\$ 5,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
29	SEASNAX 5976 E SLAUSON AVE LOS ANGELES, CA 90040	\$ 6,245.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
30	VOLVIC 	\$ 10,030.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization **WHOLE PLANET FOUNDATION**

Employer identification number
20-2376273

Part I **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
31	WALLABY YOGURT COMPANY 12002 AIRPORT WAY BROOMFIELD, CO 80021	\$ 100,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
32	GLENDA FLANAGAN 550 BOWIE STREET AUSTIN, TX 78703	\$ 5,200.	Person <input type="checkbox"/> Payroll <input checked="" type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization **WHOLE PLANET FOUNDATION**

Employer identification number

20-2376273

Part II **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
_____	_____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
_____	_____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
_____	_____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
_____	_____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
_____	_____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
_____	_____ _____ _____	\$ _____	_____

Name of organization **WHOLE PLANET FOUNDATION**

Employer identification number
20-2376273

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

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
_____	_____	_____	_____
_____	_____	_____	_____

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee
_____	_____
_____	_____

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
_____	_____	_____	_____
_____	_____	_____	_____

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee
_____	_____
_____	_____

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
_____	_____	_____	_____
_____	_____	_____	_____

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee
_____	_____
_____	_____

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
_____	_____	_____	_____
_____	_____	_____	_____

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee
_____	_____
_____	_____

ATTACHMENT 1

FORM 990PF, PART I - INTEREST ON TEMPORARY CASH INVESTMENTS

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>	<u>ADJUSTED NET INCOME</u>
INTEREST INCOME	10,453.	10,453.	10,453.
TOTAL	<u>10,453.</u>	<u>10,453.</u>	<u>10,453.</u>

ATTACHMENT 2

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>	<u>ADJUSTED NET INCOME</u>
DIVIDEND INCOME	133,849.	133,849.	133,849.
TOTAL	<u>133,849.</u>	<u>133,849.</u>	<u>133,849.</u>

ATTACHMENT 3

FORM 990PF, PART I - LEGAL FEES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>	<u>ADJUSTED NET INCOME</u>	<u>CHARITABLE PURPOSES</u>
LEGAL FEES	13,348.			13,348.
TOTALS	<u>13,348.</u>			<u>13,348.</u>

ATTACHMENT 4

FORM 990PF, PART I - ACCOUNTING FEES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>	<u>ADJUSTED NET INCOME</u>	<u>CHARITABLE PURPOSES</u>
ACCOUNTING FEES	67,869.			67,869.
TOTALS	<u>67,869.</u>			<u>67,869.</u>

ATTACHMENT 5

FORM 990PF, PART I - OTHER PROFESSIONAL FEES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>CHARITABLE PURPOSES</u>
OTHER PROFESSIONAL FEES	14,988.	14,988.
FIELD PROGRAM MANAGEMENT	243,600.	243,600.
CONSULTING FEES	4,206.	4,206.
TOTALS	<u>262,794.</u>	<u>262,794.</u>

ATTACHMENT 6

FORM 990PF, PART I - OTHER EXPENSES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>CHARITABLE PURPOSES</u>
WEBSITE DESIGN AND MAINTENANCE	10,717.	10,717.
MARKETING	1,042.	1,042.
PROCESSING FEES	4,750.	4,750.
COMMUNICATION EXPENSE	15,963.	15,963.
SUPPLIES	20,285.	20,285.
POSTAGE & DELIVERY	5,376.	5,376.
UNCOLLECTIBLE DONATIONS	35,336.	35,336.
MEALS	12,387.	12,387.
MISCELLANEOUS	19,229.	19,229.
PRINTING	3,360.	3,360.
BANK SERVICE CHARGE	476.	476.
LICENSES	9,758.	9,758.
FIELD OFFICER AWARD	9,387.	9,387.
TEAM MEMBER VOLUNTEER PROGRAM	3,742.	3,742.
RENTS	26,083.	26,083.
EVENT EXPENSE	109,662.	109,662.
TOTALS	<u>287,553.</u>	<u>287,553.</u>

ATTACHMENT 7

FORM 990PF, PART II - OTHER ASSETS

<u>DESCRIPTION</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
WFM STOCK OPTIONS		
UNDEPOSITED FUNDS	27,899.	27,899.
VANGUARD SHARES	5,191,774.	5,191,774.
TOTALS	<u>5,219,673.</u>	<u>5,219,673.</u>

ATTACHMENT 8

FORM 990PF, PART II - OTHER LIABILITIES

<u>DESCRIPTION</u>	<u>ENDING BOOK VALUE</u>
INTERCOMPANY PAYABLE	21,163.
ACCRUED EXPENSES	28,025.
TOTALS	<u>49,188.</u>

ATTACHMENT 9

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

<u>DESCRIPTION</u>	<u>AMOUNT</u>
UNREALIZED GAIN/LOSS	1,003,765.
TOTAL	<u>1,003,765.</u>

ATTACHMENT 10

FORM 990PF, PART VII-A, LINE 8A - STATES

AL, AK, AR, CA, CO, CT, DC, FL, GA, HI, IL,
KS, KY, ME, MD, MA, MI, MN, MS, MO, NH, NJ, NM, NY,
NC, ND, OH, OK, OR, PA, RI, SC, TN, UT, VA, WA, WV, WI,

FORM 990PF, PART VII-A, LINE 16 - LIST OF FOREIGN COUNTRIES

CANADA

UNITED KINGDOM

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

ATTACHMENT 12

<u>NAME AND ADDRESS</u>	<u>TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION</u>	<u>COMPENSATION</u>	<u>CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS</u>	<u>EXPENSE ACCT AND OTHER ALLOWANCES</u>
LEE VALKENAAR 550 BOWIE STREET AUSTIN, TX 78703	DIRECTOR/CHAIRMAN OF THE BOARD			
PHILIP SANSONE 550 BOWIE STREET AUSTIN, TX 78703	PRESIDENT/EXECUTIVE DIRECTOR			
GLEND A FLANAGAN 550 BOWIE STREET AUSTIN, TX 78703	DIRECTOR			
JEFF TETER 550 BOWIE STREET AUSTIN, TX 78703	DIRECTOR			
JOY STODDARD 550 BOWIE STREET AUSTIN, TX 78703	SECRETARY			
AC GALLO 550 BOWIE STREET AUSTIN, TX 78703	DIRECTOR			

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

ATTACHMENT 12 (CONT'D)

<u>NAME AND ADDRESS</u>	<u>TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION</u>	<u>COMPENSATION</u>	<u>CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS</u>	<u>EXPENSE ACCT AND OTHER ALLOWANCES</u>
ROB TWYMAN 550 BOWIE STREET AUSTIN, TX 78703	DIRECTOR			
ANGELA LORENZEN 550 BOWIE ST AUSTIN, TX 78703	DIRECTOR			
ASIM SHAD 550 BOWIE STREET AUSTIN, TX 78703	DIRECTOR			
WILLIAM JORDAN 550 BOWIE STREET AUSTIN, TX 78703	DIRECTOR			
ROBERTA LANG 550 BOWIE STREET AUSTIN, TX 78703	DIRECTOR			
JOHN MACKEY 550 BOWIE STREET AUSTIN, TX 78703	DIRECTOR			

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEESATTACHMENT 12 (CONT'D)

<u>NAME AND ADDRESS</u>	<u>TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION</u>	<u>COMPENSATION</u>	<u>CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS</u>	<u>EXPENSE ACCT AND OTHER ALLOWANCES</u>
OMAR GAYE 550 BOWIE STREET AUSTIN, TX 78703	DIRECTOR			
WALTER ROBB 550 BOWIE STREET AUSTIN, TX 78703	DIRECTOR			
ALBERT PERCIVAL 550 BOWIE STREET AUSTIN, TX 78703	V.P./ASST. SECRETARY/TREASURER			
PATRICIA YOST 550 BOWIE STREET AUSTIN, TX 78703	ASSISTANT SECRETARY			
BROOKE BUCHANAN 550 BOWIE STREET AUSTIN, TX 78703	DIRECTOR			
JEFF TURNAS 550 BOWIE STREET AUSTIN, TX 78703	DIRECTOR			

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

ATTACHMENT 12 (CONT'D)

<u>NAME AND ADDRESS</u>	<u>TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION</u>	<u>COMPENSATION</u>	<u>CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS</u>	<u>EXPENSE ACCT AND OTHER ALLOWANCES</u>
KAREN CHRISTENSEN 550 BOWIE STREET AUSTIN, TX 78703	DIRECTOR			
MICHAEL BASHAW 550 BOWIE STREET AUSTIN, TX 78703	DIRECTOR			
	GRAND TOTALS	<u>0.</u>	<u>0.</u>	<u>0.</u>

990PF, PART VIII - COMPENSATION OF THE FIVE HIGHEST PAID EMPLOYEESATTACHMENT 13

<u>NAME AND ADDRESS</u>	<u>TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION</u>	<u>COMPENSATION</u>	<u>CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS</u>
PHILIP SANSONE 550 BOWIE STREET AUSTIN, TX 78703	PRESIDENT 40.00	217,098.	7,133.
JOY STODDARD 550 BOWIE STREET AUSTIN, TX 78703	SECRETARY 40.00	129,159.	8,307.
DANIEL ZOLTANI 550 BOWIE STREET AUSTIN, TX 78703	PROGRAM MANAGER 40.00	123,766.	2,410.
LEE VALKENAAR 550 BOWIE STREET AUSTIN, TX 78703	DIRECTOR/CHAIRMAN 40.00	118,456.	3,060.
EUGENIE BOLDUC 550 BOWIE STREET AUSTIN, TX 78703	PROGRAM MANAGER 40.00	81,469.	3,060.
	TOTAL COMPENSATION	<u>669,948.</u>	<u>23,970.</u>

990PF, PART VIII- COMPENSATION OF THE FIVE HIGHEST PAID PROFESSIONALSATTACHMENT 14

<u>NAME AND ADDRESS</u>	<u>TYPE OF SERVICE</u>	<u>COMPENSATION</u>
CLAIRE KELLY 6700 MOUNTAIN AVE CHATHAM, NJ 07928 MONITOR AND EVALUATE EXISTING AND POTENTIAL MICRO FINANCE PROGRAMS IN AFRICA.	FIELD PROGRAM MGMT	133,752.
ZOE SO 272 EAST 7TH STREET, APT 5A NEW YORK, NY 10009 MONITOR AND EVALUATE EXISTING AND POTENTIAL MICRO FINANCE PROGRAMS IN AFRICA.	FIELD PROGRAM MGMT	109,848.
	TOTAL COMPENSATION	<u>243,600.</u>

Whole Planet Foundation

EIN: 20-2376273

ATTACHMENT 15

Grants and Contributions Paid During the Year

Form 990PF - Part XV

Tax Year 2017 January 1st 2017 - December 31st 2017

Grantees Name	Grantee's Address	Grant Amount	Grant Purpose
Women and Family Development Fund - Laos	Ban Phontan Neua, Asean Center, Unit E6 Vientiane Capital	\$ 50,000	For onlending capital and operating expenses of the microfinance institution operated by Women and Family Development Fund in Laos.
Mekong Plus - Vietnam G3	Mekong Plus Belgique Avenue des Quatre Bonniers, 6 BE-1348 Ottignies-Louvain-la-Neuve	\$ 50,000	For onlending capital and operating expenses of the microfinance institution operated by Mekong Plus in Vietnam.
ATIL Microfinance - Morocco G3	Appt 1, 1ere Etage, Residence El Hamama, al Baida, #70, Avenue Hassan II Tetouan , Morocco	\$ 50,000	For onlending capital and operating expenses of the microfinance institution operated by ATIL Microfinance in Morocco.
Ate Co - Philippines G3	4-247 Antero Miranda Compound, Panapaan IV, Bacoar, Cavite Province Manila, Philippines	\$ 50,000	For onlending capital and operating expenses of the microfinance institution operated by Ate Co in Philippines.
Umutanguha Financial Company - Rwanda G3	Nyamirambo, KN 2 Avenue, Building #177 Kigali, Rwanda	\$ 50,000	For onlending capital and operating expenses of the microfinance institution operated by Umutanguha Financial Company in Rwanda.
Village Enterprise - Uganda G4	751 Laurel Street, PMB #222 Physical Address: 1161 Cherry Street, Suite M San Carlos CA 94070	\$ 50,000	For onlending capital and operating expenses of the microfinance institution operated by Village Enterprise in Uganda.
Jiro-Ve - Madagascar G2	BP 182 Ivato Aeroport Antananarivo 105 - MDG	\$ 55,000	For onlending capital and operating expenses of the microfinance institution operated by Jiro-Ve in Madagascar.
One Acre Fund Kenya - Kenya G4	Box 482, Bungoma, 50200, Kenya/Tyazo Head Office, Nyamasheke District, Rwanada	\$ 60,000	For onlending capital and operating expenses of the microfinance institution operated by One Acre Fund Kenya in Kenya.
Fondasyon Kole Zepol Foundation - Haiti G6	119 Ave Christophe Port au Prince HT6114	\$ 62,000	For onlending capital and operating expenses of the microfinance institution operated by Fondasyon Kole Zepol Foundation in Haiti.
Rent to Own - Zambia G2	Plot #6644 Kabile Road, Olympia Park Lusaka	\$ 100,000	For onlending capital and operating expenses of the microfinance institution operated by Rent to Own in Zambia.
Buusaa Gonofaa - Ethiopia G4	P.O. Box 24850 Physical address: Kirkos Subcity, Debrezeit Road (opposite CBE Temenja Yaj Branch) Betesaida Bldg, 5th floor Addis Ababa 1000	\$ 100,000	For onlending capital and operating expenses of the microfinance institution operated by Buusaa Gonofaa in Ethiopia.
Grameen America - Miami	150 W 30th Street 8th floor NY NY 10001	\$ 100,000	For onlending capital and operating expenses of the microfinance institution operated by Grameen America in United States.
EdM Burkina Faso - Burkina Faso G2	4 allée du Textile - 69120 Vaulx-IN-BOND +33 (0) 4 37 24 76 50	\$ 100,000	For onlending capital and operating expenses of the microfinance institution operated by EdM Burkina Faso in Burkina Faso.
Fondo Esperanza - Chile G2	San Antonio 427 Piso 2 Santiago, Chile	\$ 100,000	For onlending capital and operating expenses of the microfinance institution operated by Fondo Esperanza in Chile.
Grameen America - Harlem	150 W 30th Street 8th floor NY NY 10001	\$ 100,000	For onlending capital and operating expenses of the microfinance institution operated by Grameen America in United States.
Initiative Development Ghana - Ghana G3	P.O.Box GP 19382 Physical: Stephens Close, Dansoman SSNIT Flat Accra, Ghana	\$ 100,000	For onlending capital and operating expenses of the microfinance institution operated by Initiative Development Ghana in Ghana.
Africa Works - Mozambique	Av. da Malhangalene, N° 131 Maputo, Mozambique	\$ 100,000	For onlending capital and operating expenses of the microfinance institution operated by Africa Works in Mozambique.
Thrive Microfinance - Zimbabwe	97 Willowvale Road Harare, Zimbabwe	\$ 100,000	For onlending capital and operating expenses of the microfinance institution operated by Thrive Microfinance in Zimbabwe.

Whole Planet Foundation

EIN: 20-2376273

ATTACHMENT 15

Grants and Contributions Paid During the Year

Form 990PF - Part XV

Tax Year 2017 January 1st 2017 - December 31st 2017

Grounded Holistic Approach to People's Empowerment - Cameroon G2	Rendez-vous junction, Longla Stree, P.O. Boz 680 Bamenda, North West Region Cameroon	\$ 100,000	For onlending capital and operating expenses of the microfinance institution operated by Grounded Holistic Approach to People's Empowerment in Cameroon.
Berendina Micro Investments Limited - Sri Lanka G2	Berendina Development Services Berendina Microfinance Institute (Gte) Limited No 152,1st Floor,Nawala Road, Nugegoda, Sri lanka.	\$ 125,000	For onlending capital and operating expenses of the microfinance institution operated by Berendina Micro Investments Limited in Sri Lanka.
Koret Israel Economic Development Funds - Israel G2	611 Front Street Sderot Sha'ul HaMelech 35, Tel Aviv, Israel	\$ 150,000	For onlending capital and operating expenses of the microfinance institution operated by Koret Israel Economic Development Funds in Israel.
Banco do Povo - Crédito Solidário - Brazil G3	Rua Grão Mogol, 650 - Sion Belo Horizonte Minas Gerais Brazil	\$ 150,000	For onlending capital and operating expenses of the microfinance institution operated by Banco do Povo - Crédito Solidário in Brazil.
TYM FUND - Vietnam G4	20 Thuy Khue St, Room 304/305 Hanoi Vietnam	\$ 150,000	For onlending capital and operating expenses of the microfinance institution operated by TYM FUND in Vietnam.
Microloan Foundation Zambia - Zambia	Collado House, Boma St P.O. Box 491; Kasungu, Malawi	\$ 160,774	For onlending capital and operating expenses of the microfinance institution operated by Microloan Foundation Zambia in Zambia.
One Acre Fund Tanzania - Tanzania G5	Box 482, Bungoma, 50200, Kenya/Tyazo Head Office, Nyamasheke District, Rwanada	\$ 167,117	For onlending capital and operating expenses of the microfinance institution operated by One Acre Fund Tanzania in Tanzania.
South Pacific Business Development - Solomon Islands - Solomon Islands	Solomon Islands 3rd Floor, BSP Building, Point Cruz PO Box 1247 Honiara, Solomon Islands Tel: (677) 23-447 Zinnur Rahman General Manager	\$ 171,000	For onlending capital and operating expenses of the microfinance institution operated by South Pacific Business Development - Solomon Islands in Solomon Islands.
Aga Khan Foundation - Cote D'Ivoire G2	Aga Khan Foundation USA 1825 K Street, NW, #901 Washington, DC 20006 USA	\$ 183,000	For onlending capital and operating expenses of the microfinance institution operated by Aga Khan Foundation in Cote D'Ivoire.
Koperasi Mitra Dhuafa - Indonesia G4	Jl.Raya Lenteng Agung Km.3 No.10 Lenteng Agung Jagakarsa - Jakarta - Indonesia 12610	\$ 187,188	For onlending capital and operating expenses of the microfinance institution operated by Koperasi Mitra Dhuafa in Indonesia.
Reliance - Gambia	Reliance Plaza, 46a Karaiba Avenue, K.S.M.D. Fajara	\$ 200,000	For onlending capital and operating expenses of the microfinance institution operated by Reliance in Gambia.
Friendship Bridge - Guatemala G2	405 Urban St. Suite 140 Denver CO	\$ 200,000	For onlending capital and operating expenses of the microfinance institution operated by Friendship Bridge in Guatemala.

Whole Planet Foundation

EIN: 20-2376273

ATTACHMENT 15

Grants and Contributions Paid During the Year

Form 990PF - Part XV

Tax Year 2017 January 1st 2017 - December 31st 2017

Fondasyon Kole Zepòl - Haiti G5	119 Ave H.Christophe Port-au-Prince HT6114	\$ 200,000	For onlending capital and operating expenses of the microfinance institution operated by Fondasyon Kole Zepòl in Haiti.
La Asociación Salvadoreña de Extensionistas Empresariales del INCAE - El Salvador G2	Colonia Medica, Diagonal Arturo Romero # 431, San Salvador	\$ 200,000	For onlending capital and operating expenses of the microfinance institution operated by La Asociación Salvadoreña de Extensionistas Empresariales del INCAE in El Salvador.
Entrepreneurs du Monde - Togo G2	4 allée du Textile - 69120 Vaulx-IN-BOND +33 (0) 4 37 24 76 50	\$ 200,000	For onlending capital and operating expenses of the microfinance institution operated by Entrepreneurs du Monde in Togo.
Banco de Ahorro y Crédito ADOPEM - Dominican Republic G2	Calle Heriberto Pieter No. 12 Ensanche Naco. Santo Domingo Dominican Republic	\$ 250,000	For onlending capital and operating expenses of the microfinance institution operated by Banco de Ahorro y Crédito ADOPEM in Dominican Republic.
Bangladesh Rehabilitation Assistance Committee - Sierra Leone - Sierra Leone G2	23 Old Lumley Road, Off Spur Road, Wilberforce Freetown Western Area 232 Sierra Leone	\$ 250,000	For onlending capital and operating expenses of the microfinance institution operated by Bangladesh Rehabilitation Assistance Committee - Sierra Leone in Sierra Leone.
Bangladesh Rehabilitation Assistance Committee - Myanmar - Myanmar G2	68 Kyun Shwe Myaing Lane 2, Bogyoke Ywa, Thuwunna, Tingangyun Township, Yangon, Myanmar (Burma)	\$ 300,000	For onlending capital and operating expenses of the microfinance institution operated by Bangladesh Rehabilitation Assistance Committee - Myanmar in Myanmar.
Al Majmoua - Lebanon	Spears, Abdel Kader Street Green Building, 1st Floor PO Box: 11-3483 Beirut- Lebanon	\$ 400,000	For onlending capital and operating expenses of the microfinance institution operated by Al Majmoua in Lebanon.
Babban Gona - Nigeria G2	9 Professor Olagoke Olabisi Street, Oceanside Estate Lagos Nigeria	\$ 500,000	For onlending capital and operating expenses of the microfinance institution operated by Babban Gona in Nigeria.
Cashpor Microcredit - India G3	N-7/1-R-9 DLW-BHU Road, Bhikaripur Varanasi Uttar Pradesh 221001 India	\$ 720,000	For onlending capital and operating expenses of the microfinance institution operated by Cashpor Microcredit in India.
		\$ 6,341,079	

FORM 990PF, PART XV - CONTRIBUTIONS APPROVED FOR FUTURE PAYMENT

ATTACHMENT 16

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
BANGLADESH REHABILITATION ASSISTANCE COMMITTEE PLOT NO. 5, STREET 9, FAYYAZ MARKET ISLAMABAD PAKISTAN		FOR ONLENDING CAPITAL AND OPERATING EXPENSES OF THE MICROFINANCE INSTITUTION.	400,000.
FRIENDSHIP BRIDGE 405 URBAN STREET, SUITE 140 DENVER, CO 80228		FOR ONLENDING CAPITAL AND OPERATING EXPENSES OF THE MICROFINANCE INSTITUTION.	100,000.
FONDO ESPERANZA SAN ANTONIO 427, PISO 2 SANTIAGO CHILE		FOR ONLENDING CAPITAL AND OPERATING EXPENSES OF THE MICROFINANCE INSTITUTION.	200,000.
GRAMEEN AMERICA 150 W 30TH STREET, 8TH FLOOR NEW YORK, NY 10001		FOR ONLENDING CAPITAL AND OPERATING EXPENSES OF THE MICROFINANCE INSTITUTION.	150,000.
INITIATIVE DEVELOPMENT GHANA P.O. BOX GP 19382 ACCRA GHANA		FOR ONLENDING CAPITAL AND OPERATING EXPENSES OF THE MICROFINANCE INSTITUTION.	200,000.
ATIL MICROFINANCE 70 AVENUE HASSAN II TETOUAN MOROCCO		FOR ONLENDING CAPITAL AND OPERATING EXPENSES OF THE MICROFINANCE INSTITUTION.	250,000.

FORM 990PF, PART XV - CONTRIBUTIONS APPROVED FOR FUTURE PAYMENT

ATTACHMENT 16 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
ATE CO 4-247 MIRANDA COMPOUND, BACOUR CAVITE PHILIPPINES		FOR ONLENDING CAPITAL AND OPERATING EXPENSES OF THE MICROFINANCE INSTITUTION.	100,000.
LA ASOCIACIÃ³N SALVADOREÃ±A DE EXTENSIONISTAS EMPR 2200-9000 COLONIA MEDICA, DIAGONAL SAN SALVADOR EL SALVADOR		FOR ONLENDING CAPITAL AND OPERATING EXPENSES OF THE MICROFINANCE INSTITUTION.	200,000.
AFRICA WORKS AV. DA MALHANGALENE, N° 131 MAPUTO MOZAMBIQUE		FOR ONLENDING CAPITAL AND OPERATING EXPENSES OF THE MICROFINANCE INSTITUTION.	200,000.
ENTREPRENEURS DU MONDE 4, ALLÉE DU TEXTILE, 69120 VAULX EN VELIN FRANCE		FOR ONLENDING CAPITAL AND OPERATING EXPENSES OF THE MICROFINANCE INSTITUTION.	400,000.
THRIVE MICROFINANCE 97 WILLOWVALE RD HARARE ZIMBABWE		FOR ONLENDING CAPITAL AND OPERATING EXPENSES OF THE MICROFINANCE INSTITUTION.	200,000.
P.O. BOX 680 BAMENDA CAMEROON		FOR ONLENDING CAPITAL AND OPERATING EXPENSES OF THE MICROFINANCE INSTITUTION.	200,000.

FORM 990PF, PART XV - CONTRIBUTIONS APPROVED FOR FUTURE PAYMENT

ATTACHMENT 16 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
ONE ACRE FUND TANZANIA P.O BOX 659 KAKAMEGA KENYA		FOR ONLENDING CAPITAL AND OPERATING EXPENSES OF THE MICROFINANCE INSTITUTION.	332,883.
KOPERASI MITRA DHUAFA JL. RAYA LENTENG AGUNG NO. 10 JAKARTA INDONESIA		FOR ONLENDING CAPITAL AND OPERATING EXPENSES OF THE MICROFINANCE INSTITUTION.	449,250.
FUNDACIÃ³N PARAGUAYA DE COOPERACIÃ³N Y DESARROLLO 5589 ESQ. TTE. ESPINOZA ASUNCION PARAGUAY		FOR ONLENDING CAPITAL AND OPERATING EXPENSES OF THE MICROFINANCE INSTITUTION.	400,000.
UMUTANGUHA FINANCIAL COMPANY NYAMIRAMBO, KN 2 AVENUE KIGALI RWANDA		FOR ONLENDING CAPITAL AND OPERATING EXPENSES OF THE MICROFINANCE INSTITUTION.	250,000.
VILLAGE ENTERPRISE 1161 CHERRY STREET, SUITE M SAN CARLOS, CA 94070		FOR ONLENDING CAPITAL AND OPERATING EXPENSES OF THE MICROFINANCE INSTITUTION.	175,000.
SAMPURNA TRAINING AND ENTREPRENEURSHIP PROGRAMME 222/18 MC GARDEN ROAD, 2ND FLOOR KOLKATA INDIA		FOR ONLENDING CAPITAL AND OPERATING EXPENSES OF THE MICROFINANCE INSTITUTION.	350,000.
TOTAL CONTRIBUTIONS APPROVED			<u>4,557,133.</u>

Expenditure Responsibility Statement
 Statement Required by Reg. 53.4945-5(d)
 Tax Year 2017 January 1st 2017 - December 31st 2017

Regional Director	Grantees Name	Grantee's Address	Dates of Grant in Current Tax Year	Grant / PRI Amount	Grant / PRI Purpose	Carryover from Previous Year	Balance Remaining	Amount Expended by Grantee	Any Diversion by Grantee?	Dates of Report by Grantee	Verification
Brian	BRAC - Sierra Leone	23 Old Lumley Road, Off Spur Road, Wilberforce Freetown Western Area 232 Sierra Leone			The Foundation Board has approved \$500,000 in Grant funding in 2011 for on-lending capital and operating expenses of the microfinance institution operated by BRAC in Sierra Leone.	\$ 187,500	\$ -	\$ 187,500	no	We successfully received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2016 as well as January 31st 2018 for the 2017 financial year. We reviewed their audited figures for the 2017 financial year.	Visited to verify project in December 2017 (Zoe)
Brian	Aga Khan Foundation - Cote D'Ivoire G2	Aga Khan Foundation USA 1825 K Street, NW, #901 Washington, DC 20006 USA	8/30/2017	\$ 183,000	The Foundation Board has approved \$549,000 in PRI funding in 2016 for on-lending capital and operating expenses of the microfinance institution operated by Aga Khan Foundation in Cote D'Ivoire.	\$ 137,250	\$ 250,000	\$ 70,250	no	We successfully received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2016 as well as January 31st 2018 for the 2017 financial year. We reviewed their audited figures for the 2017 financial year.	Visited to verify project in August 2017
Claire	Chifeng Zhaowuda Women's Sustainable Development Association (CZWSDA) - China G2	No.1 Zhaowuda Road Hongshan District Chifeng Inner Mongolia 24000 China, People's Republic of			The Foundation Board has approved \$600,000 in Grant funding in 2013 for on-lending capital and operating expenses of the microfinance institution operated by CZWSDA in China.	\$ 87,500	\$ -	\$ 87,500	To the knowledge of the Foundation, and based on direct participation with The Grantee, no part has been used other than its intended purposes.	Received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2017 as well as January 31st 2018 for the 2017 financial year. Reviewed their audited figures for the 2016 financial year.	quarterly reports
JP	La Asociación Salvadoreña de Extensionistas Empresariales del INCAE - El Salvador	Colonia Medica, Diagonal Arturo Romero # 431, San Salvador	7/31/2017	\$ 200,000	For onlending capital and operating expenses of the microfinance institution operated by ASEI in El Salvador.	\$ -	\$ -	\$ 200,000	NO	9/14/2018	Our staff visited the project in May 2018 to assess proper use of the funds and found the project in order and no diversion of funds.

Expenditure Responsibility Statement
 Statement Required by Reg. 53.4945-5(d)
 Tax Year 2017 January 1st 2017 - December 31st 2017

Regional Director	Grantees Name	Grantee's Address	Dates of Grant in Current Tax Year	Grant / PRI Amount	Grant / PRI Purpose	Carryover from Previous Year	Balance Remaining	Amount Expended by Grantee	Any Diversion by Grantee?	Dates of Report by Grantee	Verification
JP	Panama	0819- 03639, Zona 6 Panamá, República de Panamá			For onlending capital and operating expenses of the microfinance institution operated by Cashpor in India.	\$ 27,994	\$ -	\$ 27,994	NO	6/30/2018	Our staff visited the project in Sept. 2018 to assess proper use of the funds and found the project in order and no diversion of funds.
Claire	Negros Women for Tomorrow Foundation (NWTF) - Philippines G2	102 San Sebastian/Verben a Streets Bacolod City 6100 Philippines			The Foundation Board has approved \$634,535 in grant funding in 2014 for on-lending capital and operating expenses of the microfinance institution operated by NWTF in the Philippines.	\$ 165,805	\$ -	\$ 165,805	To the knowledge of The Foundation, and based on direct participation with The Grantee, no part has been used other than its intended purposes.	Received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2017 as well as January 31st 2018 for the 2017 financial year. Reviewed their audited figures for the 2016 financial year.	WPF staff visited the project in March 2017 to assess proper use of the funds and found the project in order and no diversion of funds.
Zoe	Tanzania G3	Box 482, Bungoma, 50200, Kenya/Tyazo Head Office, Nyamasheke District, Rwanada			For onlending / working capital for the agriculture microfinance company OAF operations in Tanzania	\$ 50,000	\$ -	\$ 50,000	no	We successfully received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2016 as well as January 31st 2018 for the 2017 financial year. We reviewed their audited figures for the 2017 financial year	Zoe visited in July 2017 to verify project
Claire	RENEW Microfinance - Bhutan	RENEW Organization, Phendey Oudpel Lam, Phendey Gatsel, Lower Motithang, PO Box 1404			The Foundation Board has approved \$300,000 in Grant funding in 2015 for on-lending capital and operating expenses of the microfinance institution operated by RENEW Microfinance in Surin Bhutan.	\$ 91,667	\$ (50,000)	\$ 141,667	To the knowledge of The Foundation, and based on direct participation with The Grantee, no part has been used other than its intended purposes.	Received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2017 as well as January 31st 2018 for the 2017 financial year. Reviewed their audited figures for the 2016 financial year.	Our staff visited the project in August 2017 to assess proper use of the funds and found the project in order and no diversion of funds.

Expenditure Responsibility Statement
Statement Required by Reg. 53.4945-5(d)
Tax Year 2017 January 1st 2017 - December 31st 2017

Regional Director	Grantees Name	Grantee's Address	Dates of Grant in Current Tax Year	Grant / PRI Amount	Grant / PRI Purpose	Carryover from Previous Year	Balance Remaining	Amount Expended by Grantee	Any Diversion by Grantee?	Dates of Report by Grantee	Verification
Zoe	Busaa Gonofaa - Ethiopia	Debreziet Road, P.O.Box 24850 Code 1000, Addis Ababa Ethiopia	5/30/2017	\$ 100,000	The Foundation Board has approved \$250,000 in Grant funding in 2015 for on-lending capital and operating expenses of the microfinance institution operated by Busaa Gonofaa in Ethiopia.	\$ -	\$ -	\$ 100,000	no	We successfully received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2016 as well as January 31st 2018 for the 2017 financial year. We reviewed their audited figures for the 2017 financial year	Zoe visited in July 2017 to verify project
Brian	Reliance - Gambia	Reliance Plaza 46A Kairaba Avenue, K.S.M.D The Gambia	6/12/2017	\$ 200,000	The Foundation Board has approved \$500,000 in Grant funding in 2015 for on-lending capital and operating expenses of the microfinance institution operated by Reliance in Gambia.	\$ 100,000	\$ -	\$ 300,000	no	We successfully received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2016 as well as January 31st 2018 for the 2017 financial year. We reviewed their audited figures for the 2017 financial year.	Visited project to verify in September 2017
Claire	CASHPOR India G3	N-7/1-R-9 DLW-BHU Road, Bhikaripur Varanasi Uttar Pradesh 221001 India	5/5/2017, 5/6/2017	\$ 720,000	The Foundation Board has approved \$3,610,000 in Grant funding in 2014 for on-lending capital and operating expenses of the microfinance institution operated by CASHPOR in india.	\$ 417,500	\$ 300,000	\$ 837,500	To the knowledge of The Foundation, and based on direct participation with The Grantee, no part has been used other than its intended purposes.	Received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2017 as well as January 31st 2018 for the 2017 financial year. Reviewed their audited figures for the 2016 financial year.	Our staff visited the project in July 2017 to assess proper use of the funds and found the project in order and no diversion of funds.

Expenditure Responsibility Statement
 Statement Required by Reg. 53.4945-5(d)
 Tax Year 2017 January 1st 2017 - December 31st 2017

Regional Director	Grantees Name	Grantee's Address	Dates of Grant in Current Tax Year	Grant / PRI Amount	Grant / PRI Purpose	Carryover from Previous Year	Balance Remaining	Amount Expended by Grantee	Any Diversion by Grantee?	Dates of Report by Grantee	Verification
JP	Solidarity Microfinance - Des Moines, Iowa United States	Solidarity Microfinance - Des Moines, Iowa United States INFO@SOLIDARITYMICROFINANCE.ORG (515)288-3473			The Foundation Board has approved \$300,000 in Grant funding in 2015 for on-lending capital and operating expenses of the microfinance institution operated by Solidarity Microfinance in Iowa.	\$ 141,000	\$ -	\$ 141,000	NO	6/30/2018	Quarterly Reports
Zoe	One Acre Fund (OAF) - Kenya G4	Box 482, Bungoma, 50200, Kenya/Tyazo Head Office, Nyamasheke District, Rwanada	12/27/2017		The Foundation Board has approved \$150,000 in Grant funding in 2016 for on-lending capital and operating expenses of the microfinance institution operated by OAF in Kenya.	\$ 26,000	\$ -	\$ 86,000	no	We successfully received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2016 as well as January 31st 2018 for the 2017 financial year. We reviewed their audited figures for the 2017 financial year	Zoe visited in February 2017 to verify project
Claire	BRAC - Myanmar	68 Kyun Shwe Myaing Lane 2, Bogyoke Ywa, Thuwunna, Tingangyun Township, Yangon, Myanmar (Burma)		\$ 60,000	The Foundation Board has approved \$467,670 in Grant funding in 2015 for on-lending capital and operating expenses of the microfinance institution operated by BRAC in Myanmar.	\$ 131,974	\$ -	\$ 131,974	To the knowledge of The Foundation, and based on direct participation with The Grantee, no part has been used other than its intended purposes.	Received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2017 as well as January 31st 2018 for the 2017 financial year. Reviewed their audited figures for the 2016 financial year.	Our staff visited the project in May 2017 to assess proper use of the funds and found the project in order and no diversion of funds.
Claire	Berendina Micro Investments Limited - Sri Lanka G2	Berendina Development Services Berendina Microfinance Institute (Gte) Limited No 152,1st Floor,Nawala Road, Nugegoda, Sri Lanka.	7/3/2017		The Foundation Board has approved \$500,000 in Grant funding in 2015 for on-lending capital and operating expenses of the microfinance institution operated by Berendina Micro Investments Limited in Sri Lanka.	\$ 52,083	\$ 62,500	\$ 114,583	To the knowledge of The Foundation, and based on direct participation with The Grantee, no part has been used other than its intended purposes.	Received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2017 as well as January 31st 2018 for the 2017 financial year. Reviewed their audited figures for the 2016 financial year.	Our staff visited the project in August 2017 to assess proper use of the funds and found the project in order and no diversion of funds.
				\$ 125,000		\$ 52,083	\$ 62,500	\$ 114,583			

Expenditure Responsibility Statement
 Statement Required by Reg. 53.4945-5(d)
 Tax Year 2017 January 1st 2017 - December 31st 2017

Regional Director	Grantees Name	Grantee's Address	Dates of Grant in Current Tax Year	Grant / PRI Amount	Grant / PRI Purpose	Carryover from Previous Year	Balance Remaining	Amount Expended by Grantee	Any Diversion by Grantee?	Dates of Report by Grantee	Verification
brian	Entrepreneurs du Monde - Togo	4 allée du Textile - 69120 Vaulx-IN-BOND +33 (0) 4 37 24 76 50			The Foundation Board has approved \$400,000 in Grant funding in 2015 for on-lending capital and operating expenses of the microfinance institution operated by Entrepreneurs du Monde in Togo.	\$ 100,000	\$ -	\$ 100,000	no	We successfully received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2016 as well as January 31st 2018 for the 2017 financial year. We reviewed their audited figures for the 2017 financial year.	Visited to verify project in August 2017 (Zoe)
Zoe	Microloan Foundation - Zambia	Collado House, Boma St P.O. Box 491; Kasungu, Malawi	11/21/2017		The Foundation Board has approved \$508,000 in Grant funding in 2015 for on-lending capital and operating expenses of the microfinance institution operated by Microloan Foundation in Zambia.	\$ -	\$ 160,774	\$ -	no	We successfully received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2016 as well as January 31st 2018 for the 2017 financial year. We reviewed their audited figures for the 2017 financial year	Zoe visited in Septemeber 2017 to verify project
Claire	Women and Family Development Fund (WFDF) - Laos	Ban Phonethan Nua, Saysetha District, Vientiane Laos	5/8/2017	\$ 160,774	The Foundation Board has approved \$300,000 in 2012 in PRI funding in the form of a program related investment in the current tax year for on-lending capital and operating expenses of the microfinance institution operated by Women and Family Development Fund (WFDF) in Vientiane Laos.	\$ -	\$ 29,166	\$ 54,166	To the knowledge of The Foundation, and based on direct participation with The Grantee, no part has been used other than its intended purposes.	Received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2017 as well as January 31st 2018 for the 2017 financial year. Reviewed their audited figures for the 2016 financial year.	Our staff visited the project in January 2017 to assess proper use of the funds and found the project in order and no diversion of funds.
				\$ 50,000		\$ 29,166	\$ 25,000	\$ 54,166			

Expenditure Responsibility Statement
 Statement Required by Reg. 53.4945-5(d)
 Tax Year 2017 January 1st 2017 - December 31st 2017

Regional Director	Grantees Name	Grantee's Address	Dates of Grant in Current Tax Year	Grant / PRI Amount	Grant / PRI Purpose	Carryover from Previous Year	Balance Remaining	Amount Expended by Grantee	Any Diversion by Grantee?	Dates of Report by Grantee	Verification
Claire	KOMIDA - Indonesia G3	Jl.Raya Lenteng Agung Km.3 No.10 Lenteng Agung Jagakarsa - Jakarta - Indonesia 12610			The Foundation Board has approved \$927,170 in PRI funding in the current tax year for on-lending capital of the microfinance institution operated by Komida.	\$ 167,698	\$ -	\$ 167,698	To the knowledge of The Foundation, and based on direct participation with The Grantee, no part has been used other than its intended purposes.	Received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2017 as well as January 31st 2018 for the 2017 financial year. Reviewed their audited figures for the 2016 financial year.	Our staff visited the project in April 2017 to assess proper use of the funds and found the project in order and no diversion of funds.
Zoe	Small Enterprise Foundation (SEF) - South Africa G2	P.O. Box 212 Tzaneen 850 South Africa			The Foundation Board has approved \$1,000,000 in PRI funding in 2013 for on-lending capital and operating expenses of the microfinance institution operated by SEF in South Africa.	\$ 196,000	\$ -	\$ 196,000	no	We successfully received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2016 as well as January 31st 2018 for the 2017 financial year. We reviewed their audited figures for the 2017 financial year	Zoe visited in September 2017 to verify project
Brian	Caurie MF Senegal G3	BD MGR Francois Xavier Dione Escale Nord Thies BP: 3023 Senegal			For onlending capital and operating expenses of the microfinance institution operated by Caurie in Senegal.	\$ 200,000	\$ -	\$ 200,000	no	We successfully received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2016 as well as January 31st 2018 for the 2017 financial year. We reviewed their audited figures for the 2017 financial year.	Visited to verify project in September 2017

Expenditure Responsibility Statement
 Statement Required by Reg. 53.4945-5(d)
 Tax Year 2017 January 1st 2017 - December 31st 2017

Regional Director	Grantees Name	Grantee's Address	Dates of Grant in Current Tax Year	Grant / PRI Amount	Grant / PRI Purpose	Carryover from Previous Year	Balance Remaining	Amount Expended by Grantee	Any Diversion by Grantee?	Dates of Report by Grantee	Verification
Claire	Chamroeu - Cambodia G2	# 425, St. 271, Sangkat Toul Tom Pong II Khan Chamkarmon, Phnom Penh, Cambodia			The Foundation Board has approved \$1,312,476 in PRI funding in 2014 for on-lending capital and operating expenses of the microfinance institution operated by Chamroeu in Cambodia.	\$ 340,570	\$ -	\$ 340,570	To the knowledge of The Foundation, and based on direct participation with The Grantee, no part has been used other than its intended purposes.	Received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2017 as well as January 31st 2018 for the 2017 financial year. Reviewed their audited figures for the 2016 financial year.	Our staff visited the project in February 2017 to assess proper use of the funds and found the project in order and no diversion of funds.
JP	Banco de Ahorro y Crédito (ADOPEM) - Dominican Republic G2	Calle Heriberto Pieter No. 12 Ensanche Naco. Santo Domingo Dominican Republic	8/22/2017	\$ 250,000	The Foundation Board has approved \$700,000 in PRI funding in 2014 for on-lending capital and operating expenses of the microfinance institution operated by ADOPEM in the Dominican Republic.	\$ -	\$ 60,479	\$ 189,521	NO	6/30/2018	Quarterly Reports
Brian	Babban Gona - Nigeria G2	Lekki Phase I, Lagos, Nigeria	12/22/2017, 12/26/2017	\$ 500,000	The Foundation Board has approved \$500,000 in PRI funding in 2017 for on-lending capital and operating expenses of the microfinance institution operated by Babban Gona in Nigeria.	\$ -	\$ 300,000	\$ 200,000	no	We successfully received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2016 as well as January 31st 2018 for the 2017 financial year. We reviewed their audited figures for the 2017 financial year.	Zoe visited to verify project in August 2017

Expenditure Responsibility Statement
 Statement Required by Reg. 53.4945-5(d)
 Tax Year 2017 January 1st 2017 - December 31st 2017

Regional Director	Grantees Name	Grantee's Address	Dates of Grant in Current Tax Year	Grant / PRI Amount	Grant / PRI Purpose	Carryover from Previous Year	Balance Remaining	Amount Expended by Grantee	Any Diversion by Grantee?	Dates of Report by Grantee	Verification
Zoe	Rent to Own - Zambia	Rent to Own (Z) Ltd. Lusaka, Zambia +260 978 002 600 info@rtoafrica.com www.rtoafrica.com	6/1/2017	\$ 100,000	The Foundation Board has approved \$250,000 in PRI funding in 2014 for on-lending capital and operating expenses of the microfinance institution operated by Rent to Own in Zambia.	\$ -	\$ -	\$ 100,000	no	We successfully received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2016 as well as January 31st 2018 for the 2017 financial year. We reviewed their audited figures for the 2017 financial year	Zoe visited in Septemeber 2017 to verify project
JP	Banco Do Povo - Brazil G3	Rua Grão Mogol, 650 - Sion Belo Horizonte Minas Gerais Brazil	11/13/2017	\$ 150,000	The Foundation Board has approved \$300,000 in Grant funding in 2016 for on-lending capital and operating expenses of the microfinance institution operated by Banco Do Povo in Brazil.	\$ -	\$ -	\$ 150,000	NO	9/12/2018	Quarterly Reports
Claire	GMPF - Bangladesh	Grameen Bank Bhapan, Mirpur 2, Dhaka 1216, Bangladesh			For onlending capital and operating expenses of the microfinance institution operated by GMPF in Bangladesh.	\$ 18,750	\$ -	\$ 18,750	To the knowledge of The Foundation, and based on direct participation with The Grantee, no part has been used other than its intended purposes.	Received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2017 as well as January 31st 2018 for the 2017 financial year. Reviewed their audited figures for the 2016 financial year.	quarterly reports
Brian	Burkina Faso G2	4 allée du Textile 69120 Vaulx-IN-BOND +33 (0) 4 37 24 76 50	12/20/2017	\$ 100,000	For onlending capital and operating expenses of the microfinance institution operated by EdM in Burkina Faso.	\$ 100,000	\$ 200,000	\$ -	no	We successfully received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2016 as well as January 31st 2018 for the 2017 financial year. We reviewed their audited figures for the 2017 financial year.	Visited to verify project in March 2017 (Zoe)

Expenditure Responsibility Statement
 Statement Required by Reg. 53.4945-5(d)
 Tax Year 2017 January 1st 2017 - December 31st 2017

Regional Director	Grantees Name	Grantee's Address	Dates of Grant in Current Tax Year	Grant / PRI Amount	Grant / PRI Purpose	Carryover from Previous Year	Balance Remaining	Amount Expended by Grantee	Any Diversion by Grantee?	Dates of Report by Grantee	Verification
Brian	Lebanon	Spears, Abdel Kader Street Green Building, 1st Floor PO Box: 11-3483 Beirut- Lebanon	12/1/2017		For onlending capital and operating expenses of the microfinance institution operated by Al Majmoua in Lebanon.						
				\$ 400,000		\$ 100,000	\$ 400,000	\$ 100,000	no	We successfully received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2016 as well as January 31st 2018 for the 2017 financial year. We reviewed their audited figures for the 2017 financial year.	Visited project to verify in November 2017
Zoe	Madagascar G2	BP 182 Ivato Aeroport Antananarivo 105 - MDG	12/13/2017		For onlending capital and operating expenses of the microfinance institution operated by JiroVe in Madagascar.						
				\$ 55,000		\$ 55,000	\$ 55,000	\$ 55,000	no	We successfully received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2016 as well as January 31st 2018 for the 2017 financial year. We reviewed their audited figures for the 2017 financial year	Zoe visited in February 2017 to verify project
JP	Newark	1460 Broadway 14th Floor New York, NY 10036			For on-lending capital and operating expenses of the microfinance institution operated by Grameen America in Newark, NJ.				NO	9/12/2018	Our staff visited Grameen America in June 2018 to assess proper use of the funds and found the project in order and no diversion of funds.
						\$ 180,000	\$ -	\$ 180,000			
JP	Saltlake City	International Rescue Committee 221 400 W, Salt Lake City, UT 84110			For onlending capital and operating expenses of the microfinance institution operated by IRC in Saltlake City.				NO	9/10/2018	Quarterly Reports
						\$ 47,000	\$ -	\$ 47,000			

Expenditure Responsibility Statement
 Statement Required by Reg. 53.4945-5(d)
 Tax Year 2017 January 1st 2017 - December 31st 2017

Regional Director	Grantees Name	Grantee's Address	Dates of Grant in Current Tax Year	Grant / PRI Amount	Grant / PRI Purpose	Carryover from Previous Year	Balance Remaining	Amount Expended by Grantee	Any Diversion by Grantee?	Dates of Report by Grantee	Verification
Claire	SPBD Solomon Islands	Solomon Islands 3rd Floor, BSP Building, Point Cruz PO Box 1247 Honiara, Solomon Islands Tel: (677) 23-447 Zinnur Rahman General Manager	2/23/2017	\$ 171,000	For onlending capital and operating expenses of the microfinance institution operated by BPBD in Solomon Islands.	\$ 11,583	\$ 28,500	\$ 154,083	To the knowledge of The Foundation, and based on direct participation with The Grantee, no part has been used other than its intended purposes.	Received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2017 as well as January 31st 2018 for the 2017 financial year. Reviewed their audited figures for the 2016 financial year.	Our staff visited the project in August 2017 to assess proper use of the funds and found the project in order and no diversion of funds.
Zoe	Tanzania G4	Plot 2329, Block H Mbezi Beach PO Box 105213 Dar es Salaam Tanzania			For onlending capital and operating expenses of the microfinance institution operated by BRAC in Taznania.	\$ 150,000	\$ -	\$ 150,000	no	We successfully received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2016 as well as January 31st 2018 for the 2017 financial year. We reviewed their audited figures for the 2017 financial year	Zoe visited in July 2017 to verify project
Claire	Thailand G2	21/50 Lak Muang Road Muang, Surin - 32000, Thailand			For onlending capital and operating expenses of the microfinance institution operated by SED in Thailand.	\$ 200,000	\$ -	\$ 200,000	To the knowledge of The Foundation, and based on direct participation with The Grantee, no part has been used other than its intended purposes.	Received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2017 as well as January 31st 2018 for the 2017 financial year. Reviewed their audited figures for the 2016 financial year.	Our staff visited the project in February 2017 to assess proper use of the funds and found the project in order and no diversion of funds.

Expenditure Responsibility Statement
 Statement Required by Reg. 53.4945-5(d)
 Tax Year 2017 January 1st 2017 - December 31st 2017

Regional Director	Grantees Name	Grantee's Address	Dates of Grant in Current Tax Year	Grant / PRI Amount	Grant / PRI Purpose	Carryover from Previous Year	Balance Remaining	Amount Expended by Grantee	Any Diversion by Grantee?	Dates of Report by Grantee	Verification
Zoe	Uganda G3	FINCA International 1201 15th Street, NW, 8th Floor Washington, DC 20005 +1 (202) 682-1510			For onlending capital and operating expenses of the microfinance institution operated by Brightlife in Uganda.	\$ 100,000	\$ 100,000	\$ -	no	We successfully received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2016 as well as January 31st 2018 for the 2017 financial year. We reviewed their audited figures for the 2017 financial year	ZS visited in November 2017 to verify project
Claire	Vietnam G2	20 Thuy Khue St, Room 304/305 Hanoi Vietnam			For onlending capital and operating expenses of the microfinance institution operated by TYM in Vietnam.	\$ 347,833	\$ -	\$ 347,833	To the knowledge of The Foundation, and based on direct participation with The Grantee, no part has been used other than its intended purposes.	Received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2017 as well as January 31st 2018 for the 2017 financial year. Reviewed their audited figures for the 2016 financial year.	Our staff visited the project in May 2017 to assess proper use of the funds and found the project in order and no diversion of funds.
Claire	Vietnam G3	Mekong Plus Belgique Avenue des Quatre Bonniers, 6 BE-1348 Ottignies- Louvain-la-Neuve	12/22/2017	\$ 50,000	For onlending capital and operating expenses of the microfinance institution operated by Mekong in Vietnam.	\$ 91,667	\$ 50,000	\$ 91,667	To the knowledge of The Foundation, and based on direct participation with The Grantee, no part has been used other than its intended purposes.	Received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2017 as well as January 31st 2018 for the 2017 financial year. Reviewed their audited figures for the 2016 financial year.	Our staff visited the project in October 2017 to assess proper use of the funds and found the project in order and no diversion of funds.
JP	Alterna Savings - Canada	Alterna Savings (Head Office) 319 McRae Avenue, 1st Floor Ottawa, ON K1Z 0B9	N/A	\$ -	The Foundation Board has approved \$240,000 in Grant funding in 2015 for on-lending capital and operating expenses of the microfinance institution operated by Alterna Savings in Canada.	\$ 40,000	\$ 3,960	\$ 36,040	NO	6/30/2018	Quarterly Reports

Expenditure Responsibility Statement
 Statement Required by Reg. 53.4945-5(d)
 Tax Year 2017 January 1st 2017 - December 31st 2017

Regional Director	Grantees Name	Grantee's Address	Dates of Grant in Current Tax Year	Grant / PRI Amount	Grant / PRI Purpose	Carryover from Previous Year	Balance Remaining	Amount Expended by Grantee	Any Diversion by Grantee?	Dates of Report by Grantee	Verification
JP	Grameen Aval - Colombia G2	Cra. 1ª A Bis B Este No. 76 A 30 Sur, Barrio Santa Librada	N/A	\$ -	The Foundation Board has approved \$700,000 in Grant funding in 2015 for on-lending capital and operating expenses of the microfinance institution operated by Grameen Aval in Colombia.	\$ 100,000	\$ -	\$ 100,000	NO	9/13/2018	Our staff visited the project in July 2018 to assess proper use of the funds and found the project in order and no diversion of funds.
JP	Fonkoze Haiti G5	Fonkoze USA 50 F St. NW Suite 810 Washington DC 20001 Fonkoze Haiti: 119 Avenue Christophe; Port-au-Prince, HAITI	2/2/2017	\$ 200,000	The Foundation Board has approved \$200,000 in Grant funding in 2017 for on-lending capital and operating expenses of the microfinance institution operated by Fonkoze in Haiti.	\$ -	\$ -	\$ 200,000	NO	9/11/2018	Our staff visited the project in August 2018 to assess proper use of the funds and found the project in order and no diversion of funds.
JP	Fonkoze Foundation Haiti G6	Fonkoze USA 50 F St. NW Suite 810 Washington DC 20001 Fonkoze Haiti: 119 Avenue Christophe; Port-au-Prince, HAITI	12/7/2017	\$ 62,000	The Foundation Board has approved \$62,000 in Grant funding in 2017 for on-lending capital and operating expenses of the microfinance institution operated by Fonkoze Foundation in Haiti.	\$ -	\$ -	\$ 62,000	NO	9/11/2018	Our staff visited the project in August 2018 to assess proper use of the funds and found the project in order and no diversion of funds.
Brian	Grounded Holistic Approach to People's Empowerment - Cameroon G2	Rendez-vous junction, Longla Stree, P.O. Boz 680 Bamenda, North West Region Cameroon	11/1/2017	\$ 100,000	For onlending capital and operating expenses of the microfinance institution operated by Ghape in Cameroon.	\$ -	\$ 80,000	\$ 20,000	no	We successfully received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2016 as well as January 31st 2018 for the 2017 financial year. We reviewed their audited figures for the 2017 financial year.	Visited to verify project in June 2017

Expenditure Responsibility Statement
 Statement Required by Reg. 53.4945-5(d)
 Tax Year 2017 January 1st 2017 - December 31st 2017

Regional Director	Grantees Name	Grantee's Address	Dates of Grant in Current Tax Year	Grant / PRI Amount	Grant / PRI Purpose	Carryover from Previous Year	Balance Remaining	Amount Expended by Grantee	Any Diversion by Grantee?	Dates of Report by Grantee	Verification
JP	Fondo Esperanza Chile G2	San Antonio 427 Piso 2 Santiago Chile	12/18/2017	\$ 100,000	The Foundation Board has approved \$62,000 in Grant funding in 2017 for on-lending capital and operating expenses of the microfinance institution operated by Fonkoze Foundation in Haiti.	\$ -	\$ 100,000	\$ -	NO	9/11/2018	Fondo Esperanza opened their Calama branch (WPF funded) in March 2018, so made no disbursements utilizing WPF funds until then.
Brian	Initiative Development Ghana - Ghana G3	P.O.Box GP 19382 Physical: Stephens Close, Dansoman SSNIT Flat Accra, Ghana	5/4/2017	\$ 100,000	The Foundation Board has approved \$300,000 in Grant funding in 2017 for on-lending capital and operating expenses of the microfinance institution operated by ID Ghana in Ghana.	\$ -	\$ -	\$ 100,000	no	We successfully received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2016 as well as January 31st 2018 for the 2017 financial year. We reviewed their audited figures for the 2017 financial year.	Verified program prior to proposal in February 2017
JP	Friendship Bridge Guatemala G2	405 Urban St. Suite 140 Denver CO	1/25/2017, 12/4/2017	\$ 200,000	The Foundation Board has approved \$300,000 in Grant funding in 2017 for on-lending capital and operating expenses of the microfinance institution operated by Friendship Bridge in Guatemala.	\$ -	\$ 24,084	\$ 175,916	NO	9/12/2018	Our staff visited the project in May 2018 to assess proper use of the funds and found the project in order and no diversion of funds.
JP	Grameen America - Harlem	150 W 30th Street 8th floor NY NY 10001	3/6/2017	\$ 100,000	The Foundation Board has approved \$250,000 in Grant funding in 2017 for on-lending capital and operating expenses of the microfinance institution operated by Grameen America in Harlem, New York.	\$ -	\$ -	\$ 100,000	NO	9/12/2018	Our staff visited Grameen America in June 2018 to assess proper use of the funds and found the project in order and no diversion of funds.

Expenditure Responsibility Statement
 Statement Required by Reg. 53.4945-5(d)
 Tax Year 2017 January 1st 2017 - December 31st 2017

Regional Director	Grantees Name	Grantee's Address	Dates of Grant in Current Tax Year	Grant / PRI Amount	Grant / PRI Purpose	Carryover from Previous Year	Balance Remaining	Amount Expended by Grantee	Any Diversion by Grantee?	Dates of Report by Grantee	Verification
Claire	Koperasi Mitra Dhuafa - Indonesia G4	Jl.Raya Lenteng Agung Km.3 No.10 Lenteng Agung Jagakarsa - Jakarta - Indonesia 12610	11/14/2017	\$ 187,188	The Foundation Board has approved \$636,438 in Grant funding in 2017 for on-lending capital and operating expenses of the microfinance institution operated by Komida in Indonesia.	\$ -	\$ 155,990	\$ 31,198	To the knowledge of The Foundation, and based on direct participation with The Grantee, no part has been used other than its intended purposes.	Received project updates on the expenditure of funds on January 31st 2018 for the 2017 financial year. Reviewed their audited figures for the 2016 financial year.	quarterly reports
Brian	Koret Israel Economic Development Funds (KIEDF) - Israel G2	35 Shaul Hamelech Blvd Tel Aviv 61333 Israel	12/21/2017	\$ 150,000	The Foundation Board has approved \$500,000 in Grant funding in 2014 for on-lending capital and operating expenses of the microfinance institution operated by KIEDF in Israel.	\$ -	\$ 150,000	\$ -	no	We successfully received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2016 as well as January 31st 2018 for the 2017 financial year. We reviewed their audited figures for the 2017 financial year.	Visited project to verify in February 2017
JP	Grameen America - Miami	1460 Broadway 14th Floor New York, NY 10036	11/20/2017	\$ 100,000	The Foundation Board has approved \$250,000 in Grant funding in 2017 for on-lending capital and operating expenses of the microfinance institution operated by Grameen America in Miami, Florida.	\$ -	\$ 67,500	\$ 32,500	NO	9/12/2018	Our staff visited Grameen America - Miami in July 2018 to assess proper use of the funds and found the project in order and no diversion of funds.
Brian	ATIL Microfinance - Morocco G3	Appt 1, 1ere Etage, Residence El Hamama, al Baida, #70, Avenue Hassan II Tetouan , Morocco	12/20/2017	\$ 50,000	The Foundation Board has approved \$300,000 in Grant funding in 2017 for on-lending capital and operating expenses of the microfinance institution operated by ATIL in Morocco.	\$ -	\$ 50,000	\$ -	no	We successfully received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2016 as well as January 31st 2018 for the 2017 financial year. We reviewed their audited figures for the 2017 financial year.	Visited prior to disbursement in December 2017

Expenditure Responsibility Statement
 Statement Required by Reg. 53.4945-5(d)
 Tax Year 2017 January 1st 2017 - December 31st 2017

Regional Director	Grantees Name	Grantee's Address	Dates of Grant in Current Tax Year	Grant / PRI Amount	Grant / PRI Purpose	Carryover from Previous Year	Balance Remaining	Amount Expended by Grantee	Any Diversion by Grantee?	Dates of Report by Grantee	Verification
Zoe	Africa Works - Mozambique	Av. da Malhangalene, N° 131 Maputo, Mozambique	8/21/2017	\$ 100,000	The Foundation Board has approved \$300,000 in Grant funding in 2017 for on-lending capital and operating expenses of the microfinance institution operated by Africa Works in Mozambique.	\$ -	\$ -	\$ 100,000	no	Project started in August 2017. We successfully received project updates on the expenditure of funds October 31st, 2016 as well as January 31st 2018 for the 2017 financial year. We reviewed their audited figures for the 2017 financial year	Brian visited in June 2017 prior to proposal to verify program
Claire	BRAC Myanmar Microfinance Company Limited- Myanmar G2	168 Kyun Shwe Myaing Lane 2, Bogyoke Ywa, Thuwunna, Tingangyun Township, Yangon, Myanmar (Burma)	9/15/2017	\$ 300,000	The Foundation Board has approved \$300,000 in Grant funding in 2017 for on-lending capital and operating expenses of the microfinance institution operated by BRAC in Myanmar.	\$ -	\$ 225,000	\$ 75,000	To the knowledge of The Foundation, and based on direct participation with The Grantee, no part has been used other than its intended purposes.	Received project updates on October 31st, 2017 as well as January 31st 2018 for the 2017 financial year. Reviewed their audited figures for the 2016 financial year.	quarterly reports
Claire	Ate Co - Philippines G3	4-247 Antero Miranda Compound, Panapaan IV, Bacoar, Cavite Province Manila, Philippines	6/27/2017	\$ 50,000	The Foundation Board has approved \$150,000 in Grant funding in 2017 for on-lending capital and operating expenses of the microfinance institution operated by Ate Co in Philippines.	\$ -	\$ 25,000	\$ 25,000	To the knowledge of The Foundation, and based on direct participation with The Grantee, no part has been used other than its intended purposes.	Received project updates on the expenditure of funds October 31st, 2017 as well as January 31st 2018 for the 2017 financial year. Reviewed their audited figures for the Entrepreneurs du Monde (program owner) financials for 2016.	quarterly reports
Zoe	Umutanguha Financial Company - Rwanda G3	Nyamirambo, KN 2 Avenue, Building #177 Kigali, Rwanda	12/26/2017	\$ 50,000	The Foundation Board has approved \$300,000 in PRI funding in 2017 for on-lending capital and operating expenses of the microfinance institution operated by Umutanguha in Rwanda.	\$ -	\$ 50,000	\$ -	no	Project started in December 2017. We successfully received project updates on January 31st 2018 for the 2017 financial year. We reviewed their audited figures for the 2017 financial year	Zoe visited in June 2017 prior to proposal to verify program

Expenditure Responsibility Statement
Statement Required by Reg. 53.4945-5(d)
Tax Year 2017 January 1st 2017 - December 31st 2017

Regional Director	Grantees Name	Grantee's Address	Dates of Grant in Current Tax Year	Grant / PRI Amount	Grant / PRI Purpose	Carryover from Previous Year	Balance Remaining	Amount Expended by Grantee	Any Diversion by Grantee?	Dates of Report by Grantee	Verification
Zoe	One Acre Fund Tanzania - Tanzania G5	Box 482, Bungoma, 50200, Kenya/Tyazo Head Office, Nyamasheke District, Rwanda	11/6/2017	\$ 167,117	The Foundation Board has approved \$500,000 in Grant funding in 2017 for on-lending capital and operating expenses of the microfinance institution operated by OAF in Tanzania.	\$ -	\$ 450	\$ 166,667	no	We successfully received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2016 as well as January 31st 2018 for the 2017 financial year. We reviewed their audited figures for the 2017 financial year	Zoe visited in July 2017 to verify project
Brian	Entrepreneurs du Monde - Togo G2	4 allée du Textile-69120 Vaulx-IN-BOND +33 (0) 4 37 24 76 50	10/18/2017	\$ 200,000	The Foundation Board has approved \$600,000 in Grant funding in 2017 for on-lending capital and operating expenses of the microfinance institution operated by EdM in Togo.	\$ -	\$ 200,000	\$ -	no	We successfully received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2016 as well as January 31st 2018 for the 2017 financial year. We reviewed their audited figures for the 2017 financial year.	Visited to verify project in August 2017 (Zoe)
Zoe	Village Enterprise Uganda G4	751 Laurel Street, PMB #222 Physical Address: 1161 Cherry Street, Suite M San Carlos CA 94070	12/26/2017	\$ 50,000	The Foundation Board has approved \$225,000 in Grant funding in 2017 for start up capital grants and operating expenses of the NGO operated by Village Enterprise in Uganda.	\$ -	\$ 50,000	\$ -	no	Project started in December 2017. We successfully received project updates on January 31st 2018 for the 2017 financial year. We reviewed their audited figures for the 2017 financial year	ZS visited in May 2017 to verify project
Claire	TYM FUND - Vietnam G4	20 Thuy Khue St, Room 304/305 Hanoi Vietnam	7/23/2017	\$ 150,000	The Foundation Board has approved \$150,000 in Grant funding in 2017 for on-lending capital and operating expenses of the microfinance institution operated by TYM in Vietnam.	\$ -	\$ 87,500	\$ 62,500	To the knowledge of The Foundation, and based on direct participation with The Grantee, no part has been used other than its intended purposes.	Received project updates on the expenditure of funds October 31st, 2017 as well as January 31st 2018 for the 2017 financial year. Reviewed their audited figures for the 2016 financial year.	quarterly reports

Expenditure Responsibility Statement
 Statement Required by Reg. 53.4945-5(d)
 Tax Year 2017 January 1st 2017 - December 31st 2017

Regional Director	Grantees Name	Grantee's Address	Dates of Grant in Current Tax Year	Grant / PRI Amount	Grant / PRI Purpose	Carryover from Previous Year	Balance Remaining	Amount Expended by Grantee	Any Diversion by Grantee?	Dates of Report by Grantee	Verification
Zoe	Thrive Microfinance - Zimbabwe	97 Willowvale Road Harare, Zimbabwe	10/18/2017	\$ 100,000	The Foundation Board has approved \$300,000 in PRI funding in 2017 for on-lending capital and operating expenses of the microfinance institution operated by Thrive in Zimbabwe.	\$ -	\$ -	\$ 100,000	no	Project started in October 2017. We successfully received project updates on January 31st 2018 for the 2017 financial year. We reviewed their audited figures for the 2017 financial year	Brian visited in February 2017 prior to proposal to verify program
Brian	Bangladesh Rehabilitation Assistance Committee - Sierra Leone - Sierra Leone G2	23 Old Lumley Road, Off Spur Road, Wilberforce Freetown Western Area 232 Sierra Leone	12/22/2017	\$ 250,000	The Foundation Board has approved \$500,000 in Grant funding in 2016 for on-lending capital and operating expenses of the microfinance institution operated by BRAC in Sierra Leone	\$ -	\$ 250,000	\$ -	no	We successfully received project updates on the expenditure of funds April 30th, July 31st, October 31st, 2016 as well as January 31st 2018 for the 2017 financial year. We reviewed their audited figures for the 2017 financial year.	Visited to verify project in December 2017 (Zoe)
				\$ 6,341,079		\$ 4,191,540	\$ 3,461,737	\$ 7,070,882			

**SCHEDULE D
(Form 1041)**

Department of the Treasury
Internal Revenue Service

Capital Gains and Losses

▶ Attach to Form 1041, Form 5227, or Form 990-T.
▶ Use Form 8949 to list your transactions for lines 1b, 2, 3, 8b, 9 and 10.
▶ Go to www.irs.gov/F1041 for instructions and the latest information.

OMB No. 1545-0092

2017

Name of estate or trust

WHOLE PLANET FOUNDATION

Employer identification number

20-2376273

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

Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less

See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part I, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
1a Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b.				
1b Totals for all transactions reported on Form(s) 8949 with Box A checked				
2 Totals for all transactions reported on Form(s) 8949 with Box B checked				
3 Totals for all transactions reported on Form(s) 8949 with Box C checked				
4 Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824				4
5 Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts				5
6 Short-term capital loss carryover. Enter the amount, if any, from line 9 of the 2016 Capital Loss Carryover Worksheet				6 ()
7 Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h). Enter here and on line 17, column (3) on the back ▶				7

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

See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part II, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
8a Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b.				
8b Totals for all transactions reported on Form(s) 8949 with Box D checked				
9 Totals for all transactions reported on Form(s) 8949 with Box E checked				
10 Totals for all transactions reported on Form(s) 8949 with Box F checked				
LONG-TERM CAPITAL GAIN DIVIDENDS				64,047.
11 Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824				11
12 Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts				12
13 Capital gain distributions				13
14 Gain from Form 4797, Part I				14
15 Long-term capital loss carryover. Enter the amount, if any, from line 14 of the 2016 Capital Loss Carryover Worksheet				15 ()
16 Net long-term capital gain or (loss). Combine lines 8a through 15 in column (h). Enter here and on line 18a, column (3) on the back ▶				16 64,047.

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

Schedule D (Form 1041) 2017

Part III Summary of Parts I and II		(1) Beneficiaries' (see instr.)	(2) Estate's or trust's	(3) Total
Caution: Read the instructions before completing this part.				
17	Net short-term gain or (loss).	17		
18	Net long-term gain or (loss):			
a	Total for year	18a		64,047.
b	Unrecaptured section 1250 gain (see line 18 of the wrksh.)	18b		
c	28% rate gain	18c		
19	Total net gain or (loss). Combine lines 17 and 18a. ▶	19		64,047.

Note: If line 19, column (3), is a net gain, enter the gain on Form 1041, line 4 (or Form 990-T, Part I, line 4a). If lines 18a and 19, column (2), are net gains, go to Part V, and **don't** complete Part IV. If line 19, column (3), is a net loss, complete Part IV and the **Capital Loss Carryover Worksheet**, as necessary.

Part IV Capital Loss Limitation		
20	Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line 4c, if a trust), the smaller of:	
a	The loss on line 19, column (3) or b \$3,000	20 ()

Note: If the loss on line 19, column (3), is more than \$3,000, or if Form 1041, page 1, line 22 (or Form 990-T, line 34), is a loss, complete the **Capital Loss Carryover Worksheet** in the instructions to figure your capital loss carryover.

Part V Tax Computation Using Maximum Capital Gains Rates

Form 1041 filers. Complete this part **only** if both lines 18a and 19 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), and Form 1041, line 22, is more than zero.

Caution: Skip this part and complete the **Schedule D Tax Worksheet** in the instructions if:

- Either line 18b, col. (2) or line 18c, col. (2) is more than zero, or
- Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero.

Form 990-T trusts. Complete this part **only** if both lines 18a and 19 are gains, or qualified dividends are included in income in Part I of Form 990-T, and Form 990-T, line 34, is more than zero. Skip this part and complete the **Schedule D Tax Worksheet** in the instructions if either line 18b, col. (2) or line 18c, col. (2) is more than zero.

21	Enter taxable income from Form 1041, line 22 (or Form 990-T, line 34). . .	21		
22	Enter the smaller of line 18a or 19 in column (2) but not less than zero.	22		
23	Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T) . .	23		
24	Add lines 22 and 23	24		
25	If the estate or trust is filing Form 4952, enter the amount from line 4g; otherwise, enter -0- . . . ▶	25		
26	Subtract line 25 from line 24. If zero or less, enter -0-	26		
27	Subtract line 26 from line 21. If zero or less, enter -0-	27		
28	Enter the smaller of the amount on line 21 or \$2,550	28		
29	Enter the smaller of the amount on line 27 or line 28	29		
30	Subtract line 29 from line 28. If zero or less, enter -0-. This amount is taxed at 0% ▶	30		
31	Enter the smaller of line 21 or line 26	31		
32	Subtract line 30 from line 26	32		
33	Enter the smaller of line 21 or \$12,500	33		
34	Add lines 27 and 30	34		
35	Subtract line 34 from line 33. If zero or less, enter -0-	35		
36	Enter the smaller of line 32 or line 35	36		
37	Multiply line 36 by 15% (0.15) ▶	37		
38	Enter the amount from line 31	38		
39	Add lines 30 and 36	39		
40	Subtract line 39 from line 38. If zero or less, enter -0-	40		
41	Multiply line 40 by 20% (0.20) ▶	41		
42	Figure the tax on the amount on line 27. Use the 2017 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)	42		
43	Add lines 37, 41, and 42	43		
44	Figure the tax on the amount on line 21. Use the 2017 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)	44		
45	Tax on all taxable income. Enter the smaller of line 43 or line 44 here and on Form 1041, Schedule G, line 1a (or Form 990-T, line 36) ▶	45		