** PUBLIC DISCLOSURE COPY **

Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

Department of the Treasury Internal Revenue Service

▶ Do not enter social security numbers on this form as it may be made public.

▶ Information about Form 990 and its instructions is at www.irs.gov/form990.

Inspection

OMB No. 1545-0047

| A F | or the | 2016 calendar year, or tax year beginning $$ JUN 1 , 2016 and $$ | ending <u>M</u> | AY 31, 2017 | | | | | | |
|-------------------------|-------------------------------|--|---------------------|----------------------------------|---------------------------------|--|--|--|--|--|
| | heck if oplicable: | C Name of organization | | D Employer identifie | cation number | | | | | |
| | Address | JEWISH FAMILY SERVICE | | | | | | | | |
| L | Name change Initial | Doing business as | 38-0691329 | | | | | | | |
| | _return _Final _return/ | Number and street (or P.0. box if mail is not delivered to street address) 6555 WEST MAPLE ROAD | Room/suite | E Telephone number (248)592-2300 | | | | | | |
| | termin- ated | City or town, state or province, country, and ZIP or foreign postal code | G Gross receipts \$ | 11,232,584. | | | | | | |
| X | Amende return Applica- | WEST BLOOMFIELD, MI 40322 | | H(a) Is this a group re | | | | | | |
| nending | | | | | | | | | | |
| | | SAME AS C ABOVE npt status: | | H(b) Are all subordinates in | | | | | | |
| | | npt status: X 501(c)(3) | or 527 | 1 | list. (see instructions) | | | | | |
| | | organization: X Corporation Trust Association Other | I Vear | H(c) Group exemption 1928 | I State of legal domicile: MI | | | | | |
| | | Summary | L Teat | or formation. 1920 K | 1 State of legal dofficile, 111 | | | | | |
| | 1 B | riefly describe the organization's mission or most significant activities: INSPI | RED B | Y THE WISDOM | 1 AND | | | | | |
| Governance | | VALUES OF JEWISH TRADITION WE STRENGTHEN | | | | | | | | |
| rna | 2 C | Check this box $lacktriangle$ if the organization discontinued its operations or dispose | ed of more | than 25% of its net ass | | | | | | |
| ove | | | | 3 | 37 | | | | | |
| | | lumber of independent voting members of the governing body (Part VI, line 1b) | | | 37 | | | | | |
| Activities & | | otal number of individuals employed in calendar year 2016 (Part V, line 2a) | | | 150 | | | | | |
| iviti | | otal number of volunteers (estimate if necessary) | | | 250 | | | | | |
| Act | | otal unrelated business revenue from Part VIII, column (C), line 12 | | | 0. | | | | | |
| | b N | let unrelated business taxable income from Form 990-T, line 34 | ····· | | 0. | | | | | |
| | • • | Contributions and grants (Part VIII line 1h) | | Prior Year 9,828,882. | Current Year 9,699,382. | | | | | |
| ne | | Contributions and grants (Part VIII, line 1h) | | 1,503,507. | 1,177,042. | | | | | |
| Revenue | | Program service revenue (Part VIII, line 2g) Investment income (Part VIII, column (A), lines 3, 4, and 7d) | | 16,325. | 281,948. | | | | | |
| Re | | Other revenue (Part VIII, column (A), lines 5, 4, 8r, 9c, 10c, and 11e) | | 0. | 57,874. | | | | | |
| | | otal revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12) | | 11,348,714. | 11,216,246. | | | | | |
| | | Grants and similar amounts paid (Part IX, column (A), lines 1-3) | | 2,499,399. | 2,635,589. | | | | | |
| | | denefits paid to or for members (Part IX, column (A), line 4) | | 0. | 0. | | | | | |
| S | | salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10) | | 6,403,695. | 6,479,637. | | | | | |
| Expenses | | Professional fundraising fees (Part IX, column (A), line 11e) | | 0. | 0. | | | | | |
| e | | otal fundraising expenses (Part IX, column (D), line 25) \blacktriangleright 560, 29 | | | | | | | | |
| û | 17 C | Other expenses (Part IX, column (A), lines 11a-11d, 11f-24e) | | 1,943,044. | 1,935,837. | | | | | |
| | 18 T | otal expenses. Add lines 13-17 (must equal Part IX, column (A), line 25) | | 10,846,138. | 11,051,063. | | | | | |
| | | levenue less expenses. Subtract line 18 from line 12 | | 502,576. | 165,183. | | | | | |
| Assets or d Balances | | | Be | ginning of Current Year | End of Year | | | | | |
| sset 3alai | 20 T | otal assets (Part X, line 16) | | 9,754,320. | 10,315,387. | | | | | |
| Net A | | otal liabilities (Part X, line 26) | | 933,877. | 1,016,939. | | | | | |
| | 22 N | let assets or fund balances. Subtract line 21 from line 20 | | 8,820,443. | 9,298,448. | | | | | |
| | | ies of perjury, I declare that I have examined this return, including accompanying schedules | and stateme | ints, and to the hest of my | knowledge and helief it is | | | | | |
| | • | and complete. Declaration of preparer (other than officer) is based on all information of whi | | | knowledge and boller, it is | | | | | |
| | | | p p | | | | | | | |
| Sigr | , | Signature of officer | | Date | | | | | | |
| Here | | JEFF LEV, CFO | | | | | | | | |
| | | Type or print name and title | | | | | | | | |
| | | Print/Type preparer's name Preparer's signature | | Date Check | PTIN | | | | | |
| Paid | | ROY MARINE, CPA TROY MARINE, CPA | <u> 0</u> | 4/10/19 self-employ | | | | | | |
| Prep | | Firm's name BAKER TILLY VIRCHOW KRAUSE, LLP | | Firm's EIN ▶ | 39-0859910 | | | | | |
| Use | Only | Firm's address ≥ 2000 TOWN CENTER STE. 900 | | | 0 000 000 | | | | | |
| | | SOUTHFIELD, MI 48075 | | Phone no. 24 | 8.372.7300 | | | | | |
| May | the IRS | S discuss this return with the preparer shown above? (see instructions) | | | X Yes No | | | | | |

| Part III | Sta | atement o | of Program | n Service | Accomplishments |
|----------|-----|-----------|------------|-----------|-----------------|

| | Check if Schedule O contains a response or note to any line in this Part III |
|-----|---|
| 1 | Briefly describe the organization's mission: INSPIRED BY THE WISDOM AND VALUES OF JEWISH TRADITION, WE STRENGTHEN |
| | LIVES THROUGH COMPASSIONATE SERVICE. |
| | |
| | |
| 2 | Did the organization undertake any significant program services during the year which were not listed on the |
| | prior Form 990 or 990-EZ? |
| | If "Yes," describe these new services on Schedule O. |
| 3 | Did the organization cease conducting, or make significant changes in how it conducts, any program services? Yes X No |
| 4 | If "Yes," describe these changes on Schedule O. Describe the organization's program service accomplishments for each of its three largest program services, as measured by expenses. |
| 4 | Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, the total expenses, and |
| | revenue, if any, for each program service reported. |
| 4a | (Code:) (Expenses \$5,565,145. including grants of \$1,977,309.) (Revenue \$\$ |
| | OLDER ADULT SERVICES - PROVIDE A RANGE OF SUPPORTS AND SERVICES WITH A |
| | FOCUS ON AGING IN PLACE, INCLUDING INFORMATION AND REFERRAL, GERIATRIC |
| | CARE MANAGEMENT, DOOR-THROUGH-DOOR TRANSPORTATION, ACCESS TO HOMECARE |
| | AND KOSHER MEALS-ON-WHEELS SERVICES, BENEFIT ACCESS, AND ASSISTANCE FOR |
| | HOLOCAUST SURVIVORS. SERVICES ARE PROVIDED TO OLDER ADULTS AND PERSONS |
| | WITH DISABILITIES IN THE METROPOLITAN DETROIT AREA. |
| | |
| | |
| | |
| | |
| | |
| 4b | (Code:) (Expenses \$ 1,914,603. including grants of \$ 101,659.) (Revenue \$ 560,248.) |
| | FAMILY LIFE CENTER SERVICES - PROVIDE COUNSELING, FAMILY LIFE EDUCATION, VIOLENCE INTERVENTION, ASSISTANCE IN DIVORCE SITUATIONS, |
| | MENTORING ACTIVITIES AND OUTREACH TO SCHOOLS FOR FAMILIES IN THE |
| | COMMUNITY WHO ARE IN NEED. |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| 4c | (Code:) (Expenses \$2, 433, 861. including grants of \$556, 621.) (Revenue \$\$ |
| 70 | SAFETY NET SERVICES - PROVIDE FAMILY CASE MANAGEMENT SERVICES, CONNECTS |
| | LOW-INCOME UNINSURED MEMBERS OF THE JEWISH COMMUNITY TO NEEDED HEALTH |
| | CARE THROUGH A NETWORK OF INSTITUTIONAL AND INDIVIDUAL VOLUNTEER |
| | PARTNER PROVIDERS; MONITORS COMPLIANCE TO PRESCRIBED TREATMENT |
| | REGIMENS; PROVIDES GUIDANCE AND COORDINATION TO AFFECT IMPROVED HEALTH |
| | OUTCOMES FOR PROGRAM CLIENTS; AND PROVIDES EDUCATIONAL SEMINARS ON |
| | TOPICS OF HEALING AND SPIRITUALITY FOR COMMUNITY MEMBERS AND HEALTH |
| | CARE PROFESSIONALS. PROVIDES FINANCIAL SUPPORT FOR FAMILIES IN THE FORM |
| | OF FOOD, HOUSING, HEALTHCARE, AND TRANSPORTATION. |
| | |
| | |
| 4d | Other program services (Describe in Schedule O.) |
| -ru | (Expenses \$ including grants of \$) (Revenue \$) |
| 4e | Total program service expenses ▶ 9,913,609. |
| | Form 990 (2016) |

Form 990 (2016) JEWISH FAMILY SERVICE Part IV Checklist of Required Schedules

| | | | Yes | No |
|----------|--|------|-----|----------------|
| 1 | Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? | | | |
| | If "Yes," complete Schedule A | 1_ | Х | |
| 2 | Is the organization required to complete Schedule B, Schedule of Contributors? | 2 | Х | |
| 3 | Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for | | | |
| | public office? If "Yes," complete Schedule C, Part I | 3_ | | X |
| 4 | Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect | | | |
| | during the tax year? If "Yes," complete Schedule C, Part II | 4_ | | X |
| 5 | Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or | | | |
| | similar amounts as defined in Revenue Procedure 98-19? If "Yes," complete Schedule C, Part III | 5 | | X |
| 6 | Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to | | | |
| | provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I | 6 | | X |
| 7 | Did the organization receive or hold a conservation easement, including easements to preserve open space, | | | |
| | the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II | 7 | | X |
| 8 | Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete | | | |
| | Schedule D, Part III | 8 | | X |
| 9 | Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for | | | |
| | amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? | | | |
| | If "Yes," complete Schedule D, Part IV | 9 | | X |
| 10 | Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent | | | |
| | endowments, or quasi-endowments? If "Yes," complete Schedule D, Part V | 10 | Х | |
| 11 | If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X | | | |
| | as applicable. | | | |
| а | in rea, complete conceans 2, | | 7.7 | |
| | Part VI | 11a | Х | |
| b | Did the organization report an amount for investments - other securities in Part X, line 12 that is 5% or more of its total | l | 37 | |
| | assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII | 11b | X | |
| С | Did the organization report an amount for investments - program related in Part X, line 13 that is 5% or more of its total | ١ | | , v |
| | assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII | 11c | | X |
| d | Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in | | | |
| | Part X, line 16? If "Yes," complete Schedule D, Part IX | 11d | | X |
| e | in 100, complete conducto 2,1 art x | 11e | | |
| f | Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses | | v | |
| 40- | the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part X | 11f | Х | |
| 12a | Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete | 40- | х | |
| L | Schedule D, Parts XI and XII | 12a | Λ | |
| D | Was the organization included in consolidated, independent audited financial statements for the tax year? | 12b | | x |
| 13 | If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E | 13 | | X |
| 14a | | 14a | | X |
| | Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, | - 14 | | _ - |
| J | investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 | | | |
| | or more? If "Yes," complete Schedule F, Parts I and IV | 14b | | х |
| 15 | Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any | | | |
| | foreign organization? If "Yes," complete Schedule F, Parts II and IV | 15 | | x |
| 16 | Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to | | | |
| - | or for foreign individuals? If "Yes," complete Schedule F, Parts III and IV | 16 | | x |
| 17 | Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, | | | |
| | column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I | 17 | | x |
| 18 | Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines | | | |
| | 1c and 8a? If "Yes," complete Schedule G, Part II | 18 | Х | |
| 19 | Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes." | | | |
| | complete Schedule G. Part III | 19 | | Х |
| | - | | 000 | |

Form 990 (2016) JEWISH FAMILY SERVICE
Part IV Checklist of Required Schedules (continued)

| | | | Yes | No |
|-----|---|----------|-----|------------------|
| 20a | Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H | 20a | | X |
| b | If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return? | 20b | | |
| 21 | Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or | | | |
| | domestic government on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II | 21 | | X |
| 22 | Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on | | | |
| | Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III | 22 | X | |
| 23 | Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current | | | |
| | and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes," complete | | | |
| | Schedule J | 23 | X | |
| 24a | Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the | | | |
| | last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete | | | |
| | Schedule K. If "No", go to line 25a | 24a | | X |
| b | Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? | 24b | | |
| С | Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease | | | |
| | any tax-exempt bonds? | 24c | | |
| | Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? | 24d | | |
| 25a | Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit | | | |
| | transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I | 25a | | X |
| b | Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and | | | |
| | that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete | | | |
| | Schedule L, Part I | 25b | | X |
| 26 | Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or | | | |
| | former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? If "Yes," | | | 3,7 |
| | complete Schedule L, Part II | 26 | | X |
| 27 | Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial | | | |
| | contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member | | | 3,7 |
| | of any of these persons? If "Yes," complete Schedule L, Part III | 27 | | X |
| 28 | Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV | | | |
| | instructions for applicable filing thresholds, conditions, and exceptions): | | | 7 |
| a | A current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV | 28a | | X |
| b | A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV | 28b | | |
| С | An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, | 00- | | X |
| | director, trustee, or direct or indirect owner? If "Yes," complete Schedule L, Part IV | 28c | | X |
| 29 | Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M | 29 | | |
| 30 | Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation | | | x |
| 0.4 | contributions? If "Yes," complete Schedule M | 30 | | |
| 31 | Did the organization liquidate, terminate, or dissolve and cease operations? | 24 | | x |
| 32 | If "Yes," complete Schedule N, Part I Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? f "Yes." complete | 31 | | ^ ` |
| JZ | | 32 | | x |
| 33 | Schedule N, Part II Did the organization own 100% of an entity disregarded as separate from the organization under Regulations | 32 | | |
| 33 | sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I | 33 | | x |
| 34 | Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and | | | |
| 04 | Part V, line 1 | 34 | Х | |
| 35a | Did the organization have a controlled entity within the meaning of section 512(b)(13)? | 35a | | Х |
| | If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity | 000 | | |
| 5 | within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2 | 35b | | |
| 36 | Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? | 100 | | |
| | If "Yes," complete Schedule R, Part V, line 2 | 36 | | x |
| 37 | Did the organization conduct more than 5% of its activities through an entity that is not a related organization | | | <u> </u> |
| ٠. | and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI | 37 | | x |
| 38 | Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? | <u> </u> | | |
| | Note. All Form 990 filers are required to complete Schedule O | 38 | Х | |
| | | _ | | - |

Form 990 (2016) JEWISH FAMILY SERVICE Part V Statements Regarding Other IRS Filings and Tax Compliance

| | Check if Schedule O contains a response or note to any line in this Part V | | | | | <u></u> |
|------------|---|----------|-------|----------|-----|---------|
| | | | • | | Yes | No |
| 1a | Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable | 1a | 34 | _ | | |
| b | Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable | 1b | (| <u> </u> | | |
| С | Did the organization comply with backup withholding rules for reportable payments to vendors and rep | | | | | |
| | (gambling) winnings to prize winners? | | | 1c | X | |
| 2 a | Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, | | | | | |
| | filed for the calendar year ending with or within the year covered by this return | 2a | 150 | <u>)</u> | | |
| b | If at least one is reported on line 2a, did the organization file all required federal employment tax returns | | | 2b | X | |
| | Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e -file (see instructions) | | | | | |
| | | | | 3a | | X |
| | If "Yes," has it filed a Form 990-T for this year? If "No," to line 3b, provide an explanation in Schedule C | | | 3b | | |
| 4a | At any time during the calendar year, did the organization have an interest in, or a signature or other au | | | | | l |
| | financial account in a foreign country (such as a bank account, securities account, or other financial ac- | coun | t)? | 4a | | X |
| b | If "Yes," enter the name of the foreign country: | | | | | |
| | See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Acc | | | | | 7.7 |
| 5a | | | | 5a | | X |
| b | Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transact | | | 5b | | X |
| С | If "Yes," to line 5a or 5b, did the organization file Form 8886-T? | | | 5c | | |
| 6a | Does the organization have annual gross receipts that are normally greater than \$100,000, and did the | | | | | |
| | any contributions that were not tax deductible as charitable contributions? | | | 6a | | X |
| b | If "Yes," did the organization include with every solicitation an express statement that such contributio | | • | | | |
| _ | were not tax deductible? | | | 6b | | |
| 7 | Organizations that may receive deductible contributions under section 170(c). | | | _ | Х | |
| a | Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and serv | | | | X | |
| | If "Yes," did the organization notify the donor of the value of the goods or services provided? Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was | | | 7b | Λ | |
| С | to file Form 8282? | • | illed | 7c | | x |
| ч | If "Yes," indicate the number of Forms 8282 filed during the year | 7d | | 70 | | |
| e | Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit cor | | :? | 7e | | х |
| f | Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract | | | 7f | | Х |
| g | If the organization received a contribution of qualified intellectual property, did the organization file Form | | | 7g | | |
| h | If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organizati | | | 7h | | |
| 8 | Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by | | | | | |
| | sponsoring organization have excess business holdings at any time during the year? | | | 8 | | |
| 9 | Sponsoring organizations maintaining donor advised funds. | | | | | |
| а | Did the sponsoring organization make any taxable distributions under section 4966? | | | 9a | | |
| b | Did the sponsoring organization make a distribution to a donor, donor advisor, or related person? | | | 9b | | |
| 10 | Section 501(c)(7) organizations. Enter: | | 1 | | | |
| | Initiation fees and capital contributions included on Part VIII, line 12 | 10a | | | | |
| b | Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities | 10b | | | | |
| 11 | Section 501(c)(12) organizations. Enter: | | 1 | | | |
| а | Gross income from members or shareholders | 11a | | _ | | |
| b | Gross income from other sources (Do not net amounts due or paid to other sources against | | | | | |
| | , | 11b | | | | |
| | Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1 | | ? | 12a | | |
| | , | 12b | | | | |
| 13 | Section 501(c)(29) qualified nonprofit health insurance issuers. | | | 40- | | |
| а | Is the organization licensed to issue qualified health plans in more than one state? | | | 13a | | |
| L | Note. See the instructions for additional information the organization must report on Schedule O. | | | | | |
| Ŋ | Enter the amount of reserves the organization is required to maintain by the states in which the | 13b | | | | |
| _ | | 13c | | | | |
| | Did the expeniantion vaccine any payments for indeer tenning convices during the tay year? | | | 14a | | Х |
| | If "Yes," has it filed a Form 720 to report these payments? <i>If "No." provide an explanation in Schedule</i> | | | 14b | | |
| ~ | | <u> </u> | | , | 000 | |

Form 990 (2016) JEWISH FAMILY SERVICE 38-0691329 Pag
Part VI Governance, Management, and Disclosure For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.

| | Check if Schedule O contains a response or note to any line in this Part VI | | | X | | | | |
|-----|---|----------|-----|----|--|--|--|--|
| Sec | tion A. Governing Body and Management | | | | | | | |
| | | | Yes | No | | | | |
| 1a | Enter the number of voting members of the governing body at the end of the tax year 3' | 7 | | | | | | |
| | If there are material differences in voting rights among members of the governing body, or if the governing | | | | | | | |
| | body delegated broad authority to an executive committee or similar committee, explain in Schedule O. | | | | | | | |
| b | | | | | | | | |
| 2 | Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other | | | | | | | |
| | officer, director, trustee, or key employee? | 2 | Х | | | | | |
| 3 | Did the organization delegate control over management duties customarily performed by or under the direct supervision | | | | | | | |
| | of officers, directors, or trustees, or key employees to a management company or other person? | 3 | | X | | | | |
| 4 | Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? | 4 | | Х | | | | |
| 5 | Did the organization become aware during the year of a significant diversion of the organization's assets? | 5 | | Х | | | | |
| 6 | Did the organization have members or stockholders? | 6 | | Х | | | | |
| 7a | Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or | | | | | | | |
| | more members of the governing body? | 7a | | X | | | | |
| b | Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or | | | | | | | |
| | persons other than the governing body? | 7b | | X | | | | |
| 8 | Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following: | | | | | | | |
| а | The governing body? | 8a | Х | | | | | |
| b | Each committee with authority to act on behalf of the governing body? | 8b | Х | | | | | |
| 9 | Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the | | | | | | | |
| | organization's mailing address? If "Yes," provide the names and addresses in Schedule O | 9 | | X | | | | |
| Sec | tion B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.) | | | | | | | |
| | | | Yes | No | | | | |
| 10a | Did the organization have local chapters, branches, or affiliates? | 10a | | Х | | | | |
| b | If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, | | | | | | | |
| | and branches to ensure their operations are consistent with the organization's exempt purposes? | 10b | | | | | | |
| 11a | Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? | 11a | X | | | | | |
| b | Describe in Schedule O the process, if any, used by the organization to review this Form 990. | | | | | | | |
| 12a | Did the organization have a written conflict of interest policy? If "No," go to line 13 | 12a | X | | | | | |
| b | Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts? | 12b | X | | | | | |
| С | Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe | | | | | | | |
| | in Schedule O how this was done | 12c | X | | | | | |
| 13 | Did the organization have a written whistleblower policy? | 13 | X | | | | | |
| 14 | Did the organization have a written document retention and destruction policy? | 14 | X | | | | | |
| 15 | Did the process for determining compensation of the following persons include a review and approval by independent | | | | | | | |
| | persons, comparability data, and contemporaneous substantiation of the deliberation and decision? | | | | | | | |
| а | The organization's CEO, Executive Director, or top management official | 15a | X | | | | | |
| b | Other officers or key employees of the organization | 15b | | Х | | | | |
| | If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions). | | | | | | | |
| 16a | Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a | | | | | | | |
| | taxable entity during the year? | 16a | | X | | | | |
| b | If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation | | | | | | | |
| | in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's | | | | | | | |
| | exempt status with respect to such arrangements? | 16b | | | | | | |
| Sec | tion C. Disclosure | | | | | | | |
| 17 | List the states with which a copy of this Form 990 is required to be filed ▶MI | | | | | | | |
| 18 | Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (Section 501(c)(3)s only) | vailabl | е | | | | | |
| | for public inspection. Indicate how you made these available. Check all that apply. | | | | | | | |
| | X Own website Another's website X Upon request Other (explain in Schedule O) | | | | | | | |
| 19 | Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of interest policy, and | d financ | ial | | | | | |
| | statements available to the public during the tax year. | | | | | | | |
| 20 | State the name, address, and telephone number of the person who possesses the organization's books and records: | | | | | | | |
| | CINDY THORNTON - (248)592-2300 | | | | | | | |
| | 6555 WEST MAPLE ROAD, WEST BLOOMFIELD, MI 48322 | | | | | | | |

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

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

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

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

Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee.

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

| (A) | (B) | l | ııııza | | C) | прог | ioati | (D) | (E) | (F) |
|-------------------------------|-------------------|--------------------------------|-----------------------|---------|---------------|---------------------------------|--------|-----------------|-------------------------------|------------------------|
| Name and Title | Average | Pos (do not check | | | itior more | | one | Reportable | Reportable | Estimated |
| | hours per | | | | | is both or/trus | | compensation | compensation | amount of |
| | week (list any | _ | | | | | | from the | from related organizations | other compensation |
| | hours for | Individual trustee or director | | | | pg | | organization | (W-2/1099-MISC) | from the |
| | related | stee o | ustee | | | ensat | | (W-2/1099-MISC) | | organization |
| | organizations | al trus | onal tr | | loyee | comp | | | | and related |
| | below line) | dividu | Institutional trustee | Officer | Key employee | Highest compensated employee | Former | | | organizations |
| (1) DONALD ROCHLEN | 5.00 | 드 | 드 | 5 | 32 | 主旨 | 5 | | | |
| CHAIRPERSON | 3.00 | Х | | Х | | | | 0. | 0. | 0. |
| (2) SUSAN E. CURHAN | 5.00 | 25 | | | | \vdash | | • | • | <u>·</u> |
| VICE CHAIRPERSON | 3100 | x | | х | | | | 0. | 0. | 0. |
| (3) JULIE TEICHER | 5.00 | | | | | | | | | |
| TREASURER | | Х | | х | | | | 0. | 0. | 0. |
| (4) KELLI ANDERSON | 5.00 | | | | | | | | | |
| SECRETARY | | Х | | Х | | | | 0. | 0. | 0. |
| (5) ABBE BINDER SHERBIN | 5.00 | | | | | | | | | |
| DIRECTOR | | Х | | | | | | 0. | 0. | 0. |
| (6) BETH GROSSMAN | 5.00 | | | | | | | | | |
| DIRECTOR | | Х | | | | | | 0. | 0. | 0. |
| (7) BETSY HEUER | 5.00 |] | | | | | | | | |
| DIRECTOR | | Х | | | | | | 0. | 0. | 0. |
| (8) DANIELLE DEPRIEST | 5.00 | 1 | | | | | | | | |
| DIRECTOR | | Х | | | | _ | | 0. | 0. | 0. |
| (9) DAVID JAFFE | 5.00 | ļ | | | | | | | | |
| DIRECTOR | | Х | | | | _ | | 0. | 0. | 0. |
| (10) DOROTHY BARAK | 5.00 | | | | | | | | • | |
| DIRECTOR | F 00 | Х | | | | _ | | 0. | 0. | 0. |
| (11) ELISSA MILLER | 5.00 | ., | | | | | | | 0 | |
| OIRECTOR (12) GAIL DANTO | 5.00 | Х | | | | - | | 0. | 0. | 0. |
| DIRECTOR | 3.00 | х | | | | | | 0. | 0. | 0. |
| (13) GEOFF ORLEY | 5.00 | ^ | | | | | | · · | 0. | . |
| DIRECTOR | 3.00 | Х | | | | | | 0. | 0. | 0. |
| (14) HELEN KATZ | 5.00 | | | | | | | | 0. | <u></u> |
| DIRECTOR | 3.00 | х | | | | | | 0. | 0. | 0. |
| (15) JACK KAUFMAN | 5.00 | | | | | | | • | | |
| DIRECTOR | | х | | | | | | 0. | 0. | 0. |
| (16) JEFF AISEN | 5.00 | 1 | | | | | | | | |
| DIRECTOR | | Х | | | | | | 0. | 0. | 0. |
| (17) JENNIFER LERNER FRIEDMAN | 5.00 | | | | | | | | - | |
| DIRECTOR | | Х | | | | | L | 0. | 0. | 0. |
| 632007 11-11-16 | | | | | | | | | | Form 990 (2016) |

Form **990** (2016)

| 1 2111 222 (2312) | | | | _ | | | | | | | |
|---|--|--------------------------------|---|---------|------------------------------------|--|---------------------------|--|----------------------------------|--|--|
| Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued) | | | | | | | | | | | |
| (A) | (B) | | | (0 | C) | | | (D) | (E) | (F) | |
| Name and title | Average hours per week | box | Position (do not check more than one box, unless person is both an officer and a director/trustee) | | Reportable compensation from | Reportable compensation from related | Estimated amount of other | | | | |
| | (list any hours for related organizations below line) | Individual trustee or director | In stitutio nal tru stee | Officer | Key employee | Highest compensated employee | Former | the organization (W-2/1099-MISC) | organizations (W-2/1099-MISC) | compensation from the organization and related organizations | |
| (18) JUDY ALLEN | 5.00 | | | | | | | | | | |
| DIRECTOR | | Х | | | | | | 0. | 0. | 0. | |
| (19) JULIE ROTHSTEIN DIRECTOR | 5.00 | х | | | | | | 0. | 0. | 0. | |
| (20) LORIE KESSLER | 5.00 | | | | | | | | - | | |
| DIRECTOR | | Х | | | | | | 0. | 0. | 0. | |
| (21) MARA MOSS | 5.00 | | | | | | | | | | |
| DIRECTOR | | Х | | | | | | 0. | 0. | 0. | |
| (22) MARC BAKST DIRECTOR | 5.00 | x | | | | | | 0. | 0. | 0. | |
| (23) MARK PICKLO | 5.00 | | | | | | | | - | | |
| DIRECTOR | | Х | | | | | | 0. | 0. | 0. | |
| (24) MELISSA ORLEY LAX DIRECTOR | 5.00 | x | | | | | | 0. | 0. | 0. | |
| (25) MICHAEL BERKE | 5.00 | | | | | | | | <u> </u> | | |
| DIRECTOR | | Х | | | | | | 0. | 0. | 0. | |
| (26) MICHAEL EIZELMAN | 5.00 | | | | | | | | | | |
| DIRECTOR | | Х | | | | | | 0. | 0. | 0. | |
| 1b Sub-total | | | | | | | | 0. | 0. | 0. | |
| c Total from continuation sheets to Part VI | | | | | | | | 584,729. | | 112,322. | |
| d Total (add lines 1b and 1c) | | | | | | | | 584,729. | 0. | 112,322. | |
| 2 Total number of individuals (including but n | ot limited to th | ose | liste | d ab | ove |) wh | o re | ceived more than \$100. | .000 of reportable | | |

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization. Report compensation for the calendar year ending with or within the organization's tax year.

| (A) Name and business address | (B) Description of services | (C) Compensation |
|---|-----------------------------|---------------------|
| BROOM HILDA'S CLEANING SERVICE 13700 MANHATTAN, OAK PARK, MI 48327 | IN-HOME CLEANING | 293,811. |
| ABA HOME CARE | | |
| PO BOX 721513, BERKLEY, MI 48072 PROFESSIONAL PARENT CARE | IN-HOME CLEANING | 285,722. |
| 18000 W. 9 MILE ROAD, SOUTHFIELD, MI 48075 | IN-HOME ADULT CARE | 170,435. |
| | | |
| | | |

Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization ▶ 3

| | FAMILY SE | ıR۷ | TC | <u>. C.</u> | | | | | 38-069 | 1349 |
|---|---------------------|--------------------------------|-----------------------|----------------|--------------|------------------------------|--------|---------------------|-----------------|---------------|
| Part VII Section A. Officers, Directors | s, Trustees, Key Er | nplo | yee | s, ar | nd H | ighe | est (| Compensated Employe | es (continued) | |
| (A) | (B) | | | (C | | | | (D) | (E) | (F) |
| Name and title | Average | | | | sition | | | Reportable | Reportable | Estimated |
| rame and the | hours | (cl | | allt | | | lv) | compensation | compensation | amount of |
| | per | (0. | | | | - P P | , | from | from related | other |
| | week | | | | | 9.0 | | the | organizations | compensation |
| | (list any | tor | | | | ploy | | organization | (W-2/1099-MISC) | from the |
| | hours for | direc | | | | ed em | | (W-2/1099-MISC) | (** = **) | organization |
| | related | ee or | stee | | | nsate | | | | and related |
| | organizations | Individual trustee or director | Institutional trustee | | yee | Highest compensated employee | | | | organizations |
| | below | idual | ution | la l | Key employee | esto | er | | | |
| | line) | Indiv | Instit | Officer | Key 6 | High | Former | | | |
| (27) MICKI GROSSMAN | 5.00 | | | | | | | | | |
| DIRECTOR | | Х | | | | | | 0. | 0. | 0. |
| (28) NANCY SOLWAY | 5.00 | | | | | | | | | |
| DIRECTOR | | Х | | | | | | 0. | 0. | 0. |
| (29) PATTI PHILLIPS | 5.00 | | | | | | | | | |
| DIRECTOR | | Х | | | | | | 0. | 0. | 0. |
| (30) RABBI AARON STARR | 5.00 | | | | | | | | | |
| DIRECTOR | | Х | | | | | | 0. | 0. | 0. |
| (31) RABBI YISRAEL PINSON | 5.00 | | | | | | | | | |
| DIRECTOR | | Х | | | | | | 0. | 0. | 0 . |
| (32) RANDY ORLEY | 5.00 | | | | | | | | | |
| DIRECTOR | | Х | | | | | | 0. | 0. | 0. |
| (33) SARAH VOIGHT | 5.00 | | | | | | | | | |
| DIRECTOR | | Х | | | | | | 0. | 0. | 0. |
| (34) SHARYN J. GALLATIN | 5.00 | | | | | | | | | _ |
| DIRECTOR | | Х | | | | | | 0. | 0. | 0. |
| (35) SHELLY RUBENFIRE | 5.00 | | | | | | | | | |
| DIRECTOR | <u> </u> | Х | | | | | | 0. | 0. | 0. |
| (36) STEVE SPECTOR | 5.00 | 37 | | | | | | | 0 | _ |
| DIRECTOR (37) TODD SCHAFER | 5.00 | Х | | | | | | 0. | 0. | 0. |
| DIRECTOR | 3.00 | Х | | | | | | 0. | 0. | 0. |
| (38) SHELDON STONE | 5.00 | Λ | | | | | | 0. | 0. | J |
| IMMEDIATE PAST CHAIRPERSON | 3.00 | | | x | | | | 0. | 0. | 0. |
| (39) PERRY OHREN | 65.00 | | | Λ | | | | 0. | 0. | 0 . |
| CHIEF EXECUTIVE OFFICER | 03.00 | | | $ \mathbf{x} $ | | | | 187,029. | 0. | 38,379 |
| (40) SHAINDLE BRAUNSTEIN | 50.00 | | | 25 | | | | 107,025. | • | 30,373 |
| CHIEF ADMINISTRATIVE OFFICER | 33733 | - | | $ \mathbf{x} $ | | | | 108,926. | 0. | 22,989 |
| (41) SHARI BETH GOLDMAN | 50.00 | | | | | | | | • | |
| CHIEF PROGRAM OFFICER | | | | x | | | | 98,085. | 0. | 15,061 |
| (42) DEBRA MARCUS | 50.00 | | | | | | | , | - | . , |
| CHIEF DEVELOPMENT OFFICER | | 1 | | x | | | | 95,435. | 0. | 27,783 |
| (43) BRETT NICHOLSON | 50.00 | | | | | | | | | |
| CHIEF TALENT OFFICER | | L | | Х | | | | 95,254. | 0. | 8,110. |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| Tabalda Badawii Qaali A. ii . d | | | | | | | | 594 720 | | 112 222 |
| Total to Part VII, Section A, line 1c | | | | | | | | 584,729. | | 112,322 |

38-0691329

Form 990 (2016) JEWISH FAMILY SERVICE
Part VIII Statement of Revenue

| | | Check if Schedule O conta | ains a response | or note to any line | e in this Part VIII | | | |
|--|------|--|------------------|-------------------------|---------------------|-------------------------|---------------------|---------------------------------|
| | | Official in Confidence of Confed | ano a response | or riote to driy iii to | (A) | (B) | (C) | (D) |
| | | | | | Total revenue | Related or | Unrelated | Revenuè excluded from tax under |
| | | | | | | exempt function revenue | business revenue | sections 512 - 514 |
| SS | 1 a | Federated campaigns | 1a | | | | | 312 314 |
| ant | | Membership dues | | | | | | |
| 20 5 | | Fundraising events | | 153,347. | | | | |
| Fts, | | | | 3,080,754. | | | | |
| ia ia | | Related organizations | | 1,884,587. | | | | |
| Sir. | | Government grants (contributions gifts grant | | 1,001,507. | | | | |
| atio | T | All other contributions, gifts, grant | | 4,580,694. | | | | |
| ^듩 | | similar amounts not included abov | | | | | | |
| Contributions, Gifts, Grants and Other Similar Amounts | _ | Noncash contributions included in lines | | 14,364. | 0 600 202 | | | |
| O g | n | Total. Add lines 1a-1f | | | 9,699,382. | | | |
| | | COLINGED THE GERLIAGES | | Business Code | E01 060 | E01 960 | | |
| ice | 2 a | | | 624100 | 501,869. | 501,869. | | |
| er v | b | | | 624100 | 380,499. | 380,499. | | |
| n S | С | | is | 624100 | 218,815. | 218,815. | | |
| ra Sev | d | | | 624100 | 64,033. | 64,033. | | |
| Program Service Revenue | е | HOMECARE SERVICES | | 624100 | 11,826. | 11,826. | | |
| Δ. | | All other program service reve | | | | | | |
| | g | Total. Add lines 2a-2f | | | 1,177,042. | | | |
| | 3 | Investment income (including | | | | | | |
| | | other similar amounts) | | | 208. | | | 208. |
| | 4 | Income from investment of tax | c-exempt bond p | oroceeds | | | | |
| | 5 | Royalties | | <u> </u> | | | | |
| | | | (i) Real | (ii) Personal | | | | |
| | 6 a | Gross rents | | | | | | |
| | b | Less: rental expenses | | | | | | |
| | С | Rental income or (loss) | | | | | | |
| | d | Net rental income or (loss) | | > | | | | |
| | 7 a | Gross amount from sales of | (i) Securities | (ii) Other | | | | |
| | | assets other than inventory | 258,990. | 22,750. | | | | |
| | b | Less: cost or other basis | | | | | | |
| | | and sales expenses | 0. | | | | | |
| | С | Gain or (loss) | 258,990. | 22,750. | | | | |
| | d | Net gain or (loss) | | . <u></u> | 281,740. | | | 281,740. |
| ø | 8 a | Gross income from fundraising | g events (not | | | | | |
| ğ | | including \$153 | ,347. of | | | | | |
| eve | | contributions reported on line | 1c). See | | | | | |
| Other Revenu | | Part IV, line 18 | a | 6,950. | | | | |
| 돭 | b | Less: direct expenses | t | 16,338. | | | | |
| 0 | С | Net income or (loss) from fund | raising events | > | -9,388. | | | -9,388. |
| | 9 a | Gross income from gaming ac | | | | | | |
| | | Part IV, line 19 | a | | | | | |
| | b | Less: direct expenses | | | | | | |
| | С | Net income or (loss) from gam | ing activities . | | | | | |
| | 10 a | Gross sales of inventory, less i | returns | | | | | |
| | | and allowances | a | ı | | | | |
| | b | Less: cost of goods sold | | | | | | |
| | | Net income or (loss) from sales | | | | | | |
| | | Miscellaneous Revenue | | Business Code | | | | |
| | 11 a | OTHER REVENUE | | 624100 | 67,262. | | | 67,262. |
| | b | | | | | | | |
| | С | | | | | | | |
| | d | All other revenue | | | | | | |
| | | Total. Add lines 11a-11d | | | 67,262. | | | |
| | 10 | Total revenue See instructions | | | 11 216 246. | 1 177 042. | 0. | 339 822. |

Form 990 (2016) JEWISH FAMILY SERVICE Part IX Statement of Functional Expenses

| <u>Secti</u> | on 501(c)(3) and 501(c)(4) organizations must comp | | | nplete column (A). | | | |
|-----------------|--|----------------------|--------------------------|---------------------------------|-----------------------|--|--|
| Do : | Check if Schedule O contains a response or note to any line in this Part IX Do not include amounts reported on lines 6b, Total expenses Check if Schedule O contains a response or note to any line in this Part IX (B) (C) (D) Fundraising | | | | | | |
| | 8b, 9b, and 10b of Part VIII. | Total expenses | Program service expenses | Management and general expenses | Fundraising expenses | | |
| 1 | Grants and other assistance to domestic organizations | | | | | | |
| | and domestic governments. See Part IV, line 21 | | | | | | |
| 2 | Grants and other assistance to domestic | | | | | | |
| | individuals. See Part IV, line 22 | 2,635,589. | 2,635,589. | | | | |
| 3 | Grants and other assistance to foreign | | | | | | |
| | organizations, foreign governments, and foreign | | | | | | |
| | individuals. See Part IV, lines 15 and 16 | | | | | | |
| 4 | Benefits paid to or for members | | | | | | |
| 5 | Compensation of current officers, directors, | | | | | | |
| | trustees, and key employees | 697,050. | 405,077. | 187,238. | 104,735. | | |
| 6 | Compensation not included above, to disqualified | | | | | | |
| | persons (as defined under section 4958(f)(1)) and | | | | | | |
| | persons described in section 4958(c)(3)(B) | | | | | | |
| 7 | Other salaries and wages | 4,374,856. | 3,995,139. | 191,935. | 187,782. | | |
| 8 | Pension plan accruals and contributions (include | | | | | | |
| | section 401(k) and 403(b) employer contributions) | | | | | | |
| 9 | Other employee benefits | 1,003,279. | 906,581. | 67,391. | 29,307. 11,815. | | |
| 10 | Payroll taxes | 404,452. | 365,470. | 27,167. | 11,815. | | |
| 11 | Fees for services (non-employees): | | | | | | |
| а | Management | | | | | | |
| b | Legal | | | | | | |
| С | Accounting | | | | | | |
| d | Lobbying | | | | | | |
| е | Professional fundraising services. See Part IV, line 17 | | | | | | |
| f | Investment management fees | | | | | | |
| g | Other. (If line 11g amount exceeds 10% of line 25, | | | | | | |
| | column (A) amount, list line 11g expenses on Sch 0.) | 554,264. | 486,554. | 21,974. | 45,736. 109,273. | | |
| 12 | Advertising and promotion | 153,366. | 43,545. | 548. | 109,273. | | |
| 13 | Office expenses | 149,531. | 93,088. | 25,907. | 30,536. | | |
| 14 | Information technology | | | | | | |
| 15 | Royalties | 11.5 | | | | | |
| 16 | Occupancy | 416,220. | 369,536. | 32,609. | 14,075. | | |
| 17 | Travel | 157,281. | 156,140. | 327. | 814. | | |
| 18 | Payments of travel or entertainment expenses | | | | | | |
| | for any federal, state, or local public officials | 64 505 | 44 400 | 4 540 | | | |
| 19 | Conferences, conventions, and meetings | 64,707. | 41,420. | 1,713. | 21,574. | | |
| 20 | Interest | | | | | | |
| 21 | Payments to affiliates | 166 066 | 150 055 | 10 556 | 1 422 | | |
| 22 | Depreciation, depletion, and amortization | 166,266. | 152,057. | 12,776. | 1,433. | | |
| 23 | Insurance | | | | | | |
| 24 | Other expenses. Itemize expenses not covered above. (List miscellaneous expenses in line 24e. If line | | | | | | |
| | 24e amount exceeds 10% of line 25, column (A) | | | | | | |
| | amount, list line 24e expenses on Schedule 0.) | 120 061 | 128,712. | 2,249. | | | |
| a | BAD DEBTS | 130,961. 101,245. | | 3,670. | 2,493. | | |
| b | TELEPHONE SUBSCRIPTIONS | 24,328. | 95,082. 23,214. | 709. | <u>2,493.</u> 405. | | |
| C | MEMBERSHIP DUES | 17,668. | 16,405. | 942. | 321. | | |
| d | | 17,000. | 10,403. | 744. | J41• | | |
| | All other expenses Add lines 1 through 24e | 11,051,063. | 9,913,609. | 577,155. | 560,299. | | |
| <u>25</u> 26 | Joint costs. Complete this line only if the organization | ±±,00±,000• | J, J±J, 00J• | 311,1330 | 300,233• | | |
| 20 | reported in column (B) joint costs from a combined | | | | | | |
| | educational campaign and fundraising solicitation. | | | | | | |
| | Check here if following SOP 98-2 (ASC 958-720) | | | | | | |
| | P [] II TOHOWING SOF 30-2 (MSC 300-720) | | | | 5 000 (2212) | | |

Form 990 (2016)
Part X | Balance Sheet

| Pai | art X Balance Sheet | | | | | | |
|-----------------------------|---------------------|--|---------|-----------------------|---|------------|---------------------------|
| | | Check if Schedule O contains a response or note | e to an | y line in this Part X | | | |
| | | | | | (A) Beginning of year | | (B) End of year |
| | 1 | Cash - non-interest-bearing | | | 1,094,318. | 1 | 1,370,259. |
| | 2 | Savings and temporary cash investments | | 1,934,770. | 2 | 2,424,865. | |
| | 3 | Pledges and grants receivable, net | | | | 3 | |
| | 4 | Accounts receivable, net | | | 2,834,652. | 4 | 2,894,323. |
| | 5 | Loans and other receivables from current and fo | | | | | |
| | - | trustees, key employees, and highest compensa | | · · · | | | |
| | | Part II of Schedule L | | | | 5 | |
| | 6 | Loans and other receivables from other disqualif | | | | | |
| | | section 4958(f)(1)), persons described in section | - | · | | | |
| | | employers and sponsoring organizations of secti | | | | | |
| S | | employees' beneficiary organizations (see instr). | | | | 6 | |
| Assets | 7 | Notes and loans receivable, net | | | | 7 | |
| As | 8 | Inventories for sale or use | | | | 8 | |
| | 9 | | | | 245,934. | 9 | 180,739. |
| | 10a | Land, buildings, and equipment: cost or other | | | | | |
| | | basis. Complete Part VI of Schedule D | 10a | 1,985,981. | | | |
| | b | basis. Complete Part VI of Schedule D Less: accumulated depreciation | 10b | 1,477,078. | 655,368. | 10c | 508,903. |
| | 11 | Investments - publicly traded securities | | | | 11 | |
| | 12 | Investments - other securities. See Part IV, line 1 | | | 2,989,278. | 12 | 2,806,418. |
| | 13 | Investments - program-related. See Part IV, line 1 | l1 | | | 13 | |
| | 14 | Intangible assets | | | | 14 | |
| | 15 | Other assets. See Part IV, line 11 | | | 0. | 15 | 129,880. |
| | 16 | Total assets. Add lines 1 through 15 (must equa | | | 9,754,320. | 16 | 10,315,387. |
| | 17 | Accounts payable and accrued expenses | | | 933,877. | 17 | 1,016,939. |
| | 18 | Grants payable | | | | 18 | |
| | 19 | Deferred revenue | | | | 19 | |
| | 20 | Tax-exempt bond liabilities | | | | 20 | |
| | 21 | Escrow or custodial account liability. Complete F | | | | 21 | |
| es | 22 | Loans and other payables to current and former | | | | | |
| Ė | | key employees, highest compensated employee | | | | | |
| Liabilities | | | | ····· | | 22 | |
| _ | 23 | Secured mortgages and notes payable to unrela | | | | 23 | |
| | 24 | Unsecured notes and loans payable to unrelated | | | | 24 | |
| | 25 | Other liabilities (including federal income tax, pages and the company of the com | | 1 | | | |
| | | parties, and other liabilities not included on lines | , | · | | | |
| | 06 | Schedule D | | | 933,877. | 25 | 1,016,939. |
| | 26 | Total liabilities. Add lines 17 through 25 Organizations that follow SFAS 117 (ASC 958) | | | 933,077• | 26 | 1,010,939. |
| | | complete lines 27 through 29, and lines 33 and | | K fiere 21 and | | | |
| ces | 27 | | | | 2,462,956. | 27 | 2,508,621. |
| <u>a</u> | 28 | _ | | | 4,534,094. | 28 | 4,954,934. |
| Ва | 29 | | | | 1,823,393. | 29 | 1,834,893. |
| 멑 | | Organizations that do not follow SFAS 117 (AS | | | | | |
| Ę | | and complete lines 30 through 34. | 30 330 | n, check here | | | |
| o S | 30 | Capital stock or trust principal, or current funds | | | | 30 | |
| sset | 31 | Paid-in or capital surplus, or land, building, or eq | | | | 31 | |
| Net Assets or Fund Balances | 32 | Retained earnings, endowment, accumulated inc | | | | 32 | |
| Š | 33 | | | Si curior rarias | 8,820,443. | 33 | 9,298,448. |
| | 34 | | | | 9,754,320. | 34 | 10,315,387. |
| | | | | | , | | Form 990 (2016) |

| Pai | TAI Reconciliation of Net Assets | | | | |
|-----|--|---------|-------|-----|------------|
| | Check if Schedule O contains a response or note to any line in this Part XI | | | | X |
| | | | | | |
| 1 | Total revenue (must equal Part VIII, column (A), line 12) | | 11,21 | | |
| 2 | Total expenses (must equal Part IX, column (A), line 25) | 2 | 11,05 | | |
| 3 | Revenue less expenses. Subtract line 2 from line 1 | 3 | | | 83. |
| 4 | Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A)) | 4 | 8,82 | 0,4 | <u>43.</u> |
| 5 | Net unrealized gains (losses) on investments | 5 | | | |
| 6 | Donated services and use of facilities | 6 | | | |
| 7 | Investment expenses | 7 | | | |
| 8 | Prior period adjustments | 8 | | | |
| 9 | Other changes in net assets or fund balances (explain in Schedule O) | 9 | 31 | 2,8 | 22. |
| 10 | Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, | | | | |
| | column (B)) | 10 | 9,29 | 8,4 | 48. |
| Pa | t XII Financial Statements and Reporting | | | | |
| | Check if Schedule O contains a response or note to any line in this Part XII | | | | X |
| | | | | Yes | No |
| 1 | Accounting method used to prepare the Form 990: Cash X Accrual Other | | | | |
| | If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule C |). | | | |
| 2a | Were the organization's financial statements compiled or reviewed by an independent accountant? | | 2a | | _ X_ |
| | If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed | on a | | | |
| | separate basis, consolidated basis, or both: | | | | |
| | Separate basis Consolidated basis Both consolidated and separate basis | | | | |
| b | Were the organization's financial statements audited by an independent accountant? | | 2b | X | |
| | If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate | basis, | | | |
| | consolidated basis, or both: | | | | |
| | X Separate basis Consolidated basis Both consolidated and separate basis | | | | |
| С | If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the | audit, | | | |
| | review, or compilation of its financial statements and selection of an independent accountant? | | 2c | X | |
| | If the organization changed either its oversight process or selection process during the tax year, explain in Sched | dule O. | | | |
| За | As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Sing | | | | |
| | Act and OMB Circular A-133? | | 3a | | Х |
| b | If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the require | | | | |
| | or audits, explain why in Schedule O and describe any steps taken to undergo such audits | <u></u> | 3b | | |
| | | _ | Form | 990 | (2016) |

SCHEDULE A

Department of the Treasury Internal Revenue Service

(Form 990 or 990-EZ)

Public Charity Status and Public Support

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

► Attach to Form 990 or Form 990-EZ.

▶ Information about Schedule A (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990.

OMB No. 1545-0047

Employer identification number

Open to Public Inspection

Name of the organization

| | | | SH FAMILY S | | | | | 3 | 8-0691329 |
|------|-------|--|-------------------------|--|--------------------|-----------------|------------------|--------------|----------------------------|
| Pa | rt I | Reason for Public (| Charity Status 🖟 | All organizations must co | omplete th | is part.) Se | ee instructions | | |
| The | organ | ization is not a private found | ation because it is: (F | For lines 1 through 12, c | heck only | one box.) | | | |
| 1 | | A church, convention of ch | urches, or associatio | n of churches described | l in sectio | n 170(b)(1 | I)(A)(i). | | |
| 2 | | A school described in secti | ion 170(b)(1)(A)(ii). (| Attach Schedule E (Forn | n 990 or 99 | 90-EZ).) | | | |
| 3 | | A hospital or a cooperative | hospital service orga | anization described in se | ection 170 | (b)(1)(A)(ii | ii). | | |
| 4 | | A medical research organiza | | | | | | (iii). Enter | the hospital's name, |
| | | city, and state: | | | | | | | |
| 5 | | An organization operated for | or the benefit of a col | lege or university owned | d or operat | ed by a go | vernmental ur | nit describe | ed in |
| | | section 170(b)(1)(A)(iv). (C | Complete Part II.) | | | | | | |
| 6 | | A federal, state, or local gov | vernment or governm | nental unit described in | section 17 | 70(b)(1)(A) | (v). | | |
| 7 | X | An organization that norma | lly receives a substar | ntial part of its support fi | rom a gove | ernmental | unit or from th | e general į | oublic described in |
| | | section 170(b)(1)(A)(vi). (C | omplete Part II.) | | | | | | |
| 8 | | A community trust describe | ed in section 170(b)(| 1)(A)(vi). (Complete Par | t II.) | | | | |
| 9 | | An agricultural research org | ganization described | in section 170(b)(1)(A)(| ix) operate | ed in conju | ınction with a | land-grant | college |
| | | or university or a non-land-g | grant college of agricu | ulture (see instructions). | Enter the | name, city | , and state of | the college | or |
| | | university: | | | | | | | |
| 10 | | An organization that norma | Illy receives: (1) more | than 33 1/3% of its sup | port from o | ontributio | ns, membersh | nip fees, an | d gross receipts from |
| | | activities related to its exem | npt functions - subjec | ct to certain exceptions, | and (2) no | more than | n 33 1/3% of it | s support 1 | from gross investment |
| | | income and unrelated busin | ness taxable income | (less section 511 tax) fro | m busines | ses acqui | red by the org | anization a | after June 30, 1975. |
| | | See section 509(a)(2). (Cor | mplete Part III.) | | | | | | |
| 11 | Ш | An organization organized a | and operated exclusi | vely to test for public sa | fety.See | section 50 | 09(a)(4). | | |
| 12 | | An organization organized a | and operated exclusi | vely for the benefit of, to | perform t | he functio | ns of, or to car | rry out the | purposes of one or |
| | | more publicly supported or | ganizations describe | d in section 509(a)(1) d | r section : | 509(a)(2). | See section 5 | 509(a)(3). (| Check the box in |
| | _ | lines 12a through 12d that | describes the type of | f supporting organization | n and com | plete lines | 12e, 12f, and | 12g. | |
| а | | | anization operated, su | upervised, or controlled | by its supp | oorted org | anization(s), ty | pically by | giving |
| | | the supported organization | on(s) the power to rec | gularly appoint or elect a | majority o | of the direc | tors or trustee | es of the su | upporting |
| | | organization. You must o | | | | | | | |
| b | | | anization supervised | or controlled in connect | tion with its | s supporte | ed organization | n(s), by hav | ving |
| | | control or management o | | | ame perso | ns that co | ntrol or manaç | ge the supp | ported |
| | _ | organization(s). You mus | | | | | | | |
| С | | | - | | | | | ly integrate | ed with, |
| | _ | its supported organization | | · | | | | | |
| d | | | | | | | | - | |
| | | that is not functionally int | - | | • | | - | an attentiv | /eness |
| | | requirement (see instructi | • | • | • | | | | |
| е | | ☐ Check this box if the orga | | | | | Type I, Type I | I, Type III | |
| | | functionally integrated, or | | nally integrated supporti | ng organiz | ation. | | | |
| | | er the number of supported o | • | -l | | | | | |
| g | | vide the following information i) Name of supported | (ii) EIN | d organization(s). (iii) Type of organization | (iv) Is the orga | nization listed | (v) Amount of | monetary | (vi) Amount of other |
| | , | organization | (, | (described on lines 1-10 | in your governi | ng document? No | support (see in | • | support (see instructions) |
| | | - | | above (see instructions)) | 163 | 140 | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| Tota | | | | | | | | | |

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

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

| Sec | ction A. Public Support | | | | | | |
|------|--|---------------|-----------------|-----------------|---------------------------------------|-----------------|-----------|
| Cale | ndar year (or fiscal year beginning in) | (a) 2012 | (b) 2013 | (c) 2014 | (d) 2015 | (e) 2016 | (f) Total |
| 1 | Gifts, grants, contributions, and | | | | | | |
| | membership fees received. (Do not | | | | | | |
| | include any "unusual grants.") | 8375903. | 9473953. | 9288500. | 9828882. | 9699382. | 46666620. |
| 2 | Tax revenues levied for the organ- | | | | | | |
| | ization's benefit and either paid to | | | | | | |
| | or expended on its behalf | | | | | | |
| 3 | The value of services or facilities | | | | | | |
| | furnished by a governmental unit to | | | | | | |
| | the organization without charge | | | | | | |
| 4 | Total. Add lines 1 through 3 | 8375903. | 9473953. | 9288500. | 9828882. | 9699382. | 46666620. |
| 5 | The portion of total contributions | | | | | | |
| | by each person (other than a | | | | | | |
| | governmental unit or publicly | | | | | | |
| | supported organization) included | | | | | | |
| | on line 1 that exceeds 2% of the | | | | | | |
| | amount shown on line 11, | | | | | | |
| | column (f) | | | | | | |
| | Public support. Subtract line 5 from line 4. | | | | | | 46666620. |
| Sec | ction B. Total Support | | | | · | | |
| | ndar year (or fiscal year beginning in) | (a) 2012 | (b) 2013 | (c) 2014 | (d) 2015 | (e) 2016 | (f) Total |
| 7 | Amounts from line 4 | 8375903. | 9473953. | 9288500. | 9828882. | 9699382. | 46666620. |
| 8 | Gross income from interest, | | | | | | |
| | dividends, payments received on | | | | | | |
| | securities loans, rents, royalties | 0 0 0 1 1 | 4 4 7 4 | 2.4.2 | 22- | | |
| | and income from similar sources | 2,871. | 1,471. | 240. | 325. | 208. | 5,115. |
| 9 | Net income from unrelated business | | | | | | |
| | activities, whether or not the | | | | | | |
| | business is regularly carried on | | | | | | |
| 10 | Other income. Do not include gain | | | | | | |
| | or loss from the sale of capital | | | | | 67 262 | 67 262 |
| | assets (Explain in Part VI.) | | | | | 67,262. | |
| 11 | | | | | | | 46738997. |
| 12 | Gross receipts from related activities, | • | , | | | | ,107,499. |
| 13 | First five years. If the Form 990 is for | - | | | - | | . □ |
| Sec | organization, check this box and stop ction C. Computation of Publi | c Support Per | centage | | | | P |
| 14 | | | | olumn (f)) | | 14 | 99.85 % |
| 15 | Public support percentage for 2015 | | | | | 15 | 99.98 % |
| | 33 1/3% support test - 2016. If the c | | | | | | |
| 102 | stop here. The organization qualifies | | | | | | |
| h | 33 1/3% support test - 2015. If the c | | | | | | |
| _ | and stop here. The organization qual | | | | | | . \Box |
| 17a | 10% -facts-and-circumstances test | | | | | | |
| | and if the organization meets the "fac | ū | | | | | * |
| | meets the "facts-and-circumstances" | | | - | · · · · · · · · · · · · · · · · · · · | _ | |
| h | 10% -facts-and-circumstances test | | | | | | |
| ~ | more, and if the organization meets th | - | | | | | |
| | organization meets the "facts-and-circ | | • | | • • | | . |
| _18 | Private foundation. If the organization | | | • | , | | <u> </u> |

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

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

| Se | ction A. Public Support | now, please comp | Diete Part II.) | | | | |
|---------|--|--------------------|-----------------------|------------------------|---------------------|----------------------|-------------|
| | ndar year (or fiscal year beginning in) | (a) 2012 | (b) 2013 | (c) 2014 | (d) 2015 | (e) 2016 | (f) Total |
| | Gifts, grants, contributions, and | | | | | | ,, |
| | membership fees received. (Do not include any "unusual grants.") | | | | | | |
| 2 | Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose | | | | | | |
| 3 | Gross receipts from activities that are not an unrelated trade or business under section 513 | | | | | | |
| 4 | Tax revenues levied for the organ- ization's benefit and either paid to or expended on its behalf | | | | | | |
| 5 | The value of services or facilities furnished by a governmental unit to the organization without charge | | | | | | |
| | Total. Add lines 1 through 5 | | | | | | |
| 78 | Amounts included on lines 1, 2, and 3 received from disqualified persons | | | | | | |
| k | Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year | | | | | | |
| ď | Add lines 7a and 7b | | | | | | |
| 8 Se | Public support. (Subtract line 7c from line 6.) | | | | | | |
| Cale | ndar year (or fiscal year beginning in) 🕨 | (a) 2012 | (b) 2013 | (c) 2014 | (d) 2015 | (e) 2016 | (f) Total |
| | Amounts from line 6 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources | | | | | | |
| k | Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975 | | | | | | |
| | Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on | | | | | | |
| 12 | Other income. Do not include gain or loss from the sale of capital assets (Explain in Part VI.) | | | | | | |
| 13 | Total support. (Add lines 9, 10c, 11, and 12.) | | | | | | |
| 14 | First five years. If the Form 990 is for | the organization's | s first, second, thir | d, fourth, or fifth ta | ax year as a sectio | n 501(c)(3) organiza | ation, |
| _ | check this box and stop here | | | | | | > |
| | ction C. Computation of Publi | | | | | T 1 | |
| | Public support percentage for 2016 (li | | | | | 15 | <u>%</u> |
| | Public support percentage from 2015 ction D. Computation of Inves | | | | | 16 | % |
| | • | | | 10 1 (0) | | 147 | |
| | Investment income percentage for 20 | | | | | 17 | <u>%</u> |
| | Investment income percentage from 2 | | | | | 18 | 7 is not |
| 198 | 33 1/3% support tests - 2016. If the | | | | | | / IS HOL |
| k | more than 33 1/3%, check this box ar 33 1/3% support tests - 2015. If the | organization did r | not check a box or | line 14 or line 19a | a, and line 16 is m | ore than 33 1/3%, a | |
| | line 18 is not more than 33 1/3%, che | ck this box and s | top here. The org | anization qualifies | as a publicly supp | orted organization | ▶∐ |
| 20 | Private foundation. If the organizatio | n did not check a | box on line 14, 19 | a, or 19b, check th | nis box and see in: | structions | ▶∐_ |

Part IV | Supporting Organizations

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

Section A. All Supporting Organizations

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

| | Yes | No |
|------------|-----|----|
| | | |
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| 3a | | |
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| 40 | | |
| 10a | | |
| 10h | | |
| 10b | | |

| Par | t IV Supporting Organizations _(continued) | | |
|----------|---|--------|---------|
| | <u> </u> | Yes | s No |
| 11 | Has the organization accepted a gift or contribution from any of the following persons? | | |
| а | A person who directly or indirectly controls, either alone or together with persons described in (b) and (c) | | |
| | below, the governing body of a supported organization? | | |
| b | A family member of a person described in (a) above? | | |
| | A 35% controlled entity of a person described in (a) or (b) above? If "Yes" to a, b, or c, provide detail in Part VI. | | \bot |
| Sect | tion B. Type I Supporting Organizations | | |
| | | Yes | s No |
| 1 | Did the directors, trustees, or membership of one or more supported organizations have the power to | | |
| | regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the | | |
| | tax year? If "No," describe in Part VI how the supported organization(s) effectively operated, supervised, or | | |
| | controlled the organization's activities. If the organization had more than one supported organization, | | |
| | describe how the powers to appoint and/or remove directors or trustees were allocated among the supported | | |
| | organizations and what conditions or restrictions, if any, applied to such powers during the tax year. | | + |
| | Did the organization operate for the benefit of any supported organization other than the supported | | |
| | organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in | | |
| | Part VI how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised or controlled the supporting organization 2 | | |
| | supervised, or controlled the supporting organization. 2 tion C. Type II Supporting Organizations | | |
| 000 | non of Type in oupporting organizations | Yes | s No |
| 1 | Were a majority of the organization's directors or trustees during the tax year also a majority of the directors | 16 | 3 140 |
| | or trustees of each of the organization's supported organization(s)? If "No," describe in Part VI how control | | |
| | or management of the supporting organization was vested in the same persons that controlled or managed | | |
| | the supported organization(s). | | |
| Sect | tion D. All Type III Supporting Organizations | | |
| | | Yes | s No |
| 1 | Did the organization provide to each of its supported organizations, by the last day of the fifth month of the | | |
| | organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax | | |
| | year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the | | |
| | organization's governing documents in effect on the date of notification, to the extent not previously provided? | | \bot |
| 2 | Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported | | |
| | organization(s) or (ii) serving on the governing body of a supported organization? If "No," explain in Part VI how | | |
| | the organization maintained a close and continuous working relationship with the supported organization(s). | | |
| | By reason of the relationship described in (2), did the organization's supported organizations have a | | |
| | significant voice in the organization's investment policies and in directing the use of the organization's | | |
| | income or assets at all times during the tax year? If "Yes," describe in Part VI the role the organization's | | |
| <u> </u> | supported organizations played in this regard. ition E. Type III Functionally Integrated Supporting Organizations | | |
| | | | |
| 1 a | Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions). The organization satisfied the Activities Test. Complete line 2 below. | | |
| b | The organization is the parent of each of its supported organizations. Complete line 3 below. | | |
| c | The organization supported a governmental entity. Describe in Part VI how you supported a government entity (see instruction | c) | |
| | Activities Test. Answer (a) and (b) below. | Yes | s No |
| | Did substantially all of the organization's activities during the tax year directly further the exempt purposes of | | |
| | the supported organization(s) to which the organization was responsive? If "Yes," then in Part VI identify | | |
| | those supported organizations and explain how these activities directly furthered their exempt purposes, | | |
| | how the organization was responsive to those supported organizations, and how the organization determined | | |
| | that these activities constituted substantially all of its activities. | | |
| b | Did the activities described in (a) constitute activities that, but for the organization's involvement, one or more | | |
| | of the organization's supported organization(s) would have been engaged in? If "Yes," explain in Part VI the | | |
| | reasons for the organization's position that its supported organization(s) would have engaged in these | | |
| | activities but for the organization's involvement. | \bot | \perp |
| 3 | Parent of Supported Organizations. Answer (a) and (b) below. | | |
| | Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or | | |
| | trustees of each of the supported organizations? Provide details in Part VI. | | _ |
| b | Did the organization exercise a substantial degree of direction over the policies, programs, and activities of each | | |
| | of its supported organizations? If "Yes," describe in Part VI the role played by the organization in this regard. | | |

| Pai | Type III Non-Functionally Integrated 509(a)(3) Supporting | <u>g Organ</u> | izations | | |
|---|--|----------------|-----------------------------|--------------------------------|--|
| 1 Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov. 20, 1970 (explain in Part VI.) See instruct | | | | | |
| | other Type III non-functionally integrated supporting organizations must co | mplete Se | ctions A through E. | | |
| Sect | ion A - Adjusted Net Income | | (A) Prior Year | (B) Current Year (optional) | |
| 1 | Net short-term capital gain | 1 | | | |
| 2 | Recoveries of prior-year distributions | 2 | | | |
| 3 | Other gross income (see instructions) | 3 | | | |
| 4 | Add lines 1 through 3 | 4 | | | |
| 5 | Depreciation and depletion | 5 | | | |
| 6 | Portion of operating expenses paid or incurred for production or | | | | |
| | collection of gross income or for management, conservation, or | | | | |
| | maintenance of property held for production of income (see instructions) | 6 | | | |
| 7 | Other expenses (see instructions) | 7 | | | |
| 8_ | Adjusted Net Income (subtract lines 5, 6, and 7 from line 4) | 8 | | | |
| Sect | ion B - Minimum Asset Amount | | (A) Prior Year | (B) Current Year (optional) | |
| 1 | Aggregate fair market value of all non-exempt-use assets (see | | | | |
| | instructions for short tax year or assets held for part of year): | | | | |
| a | Average monthly value of securities | 1a | | | |
| b | Average monthly cash balances | 1b | | | |
| с | Fair market value of other non-exempt-use assets | 1c | | | |
| d | Total (add lines 1a, 1b, and 1c) | 1d | | | |
| е | Discount claimed for blockage or other | | | | |
| | factors (explain in detail in Part VI): | | | | |
| 2 | Acquisition indebtedness applicable to non-exempt-use assets | 2 | | | |
| _3_ | Subtract line 2 from line 1d | 3 | | | |
| 4 | Cash deemed held for exempt use. Enter 1-1/2% of line 3 (for greater amount, | | | | |
| | see instructions) | 4 | | | |
| 5 | Net value of non-exempt-use assets (subtract line 4 from line 3) | 5 | | | |
| 6 | Multiply line 5 by .035 | 6 | | | |
| _7_ | Recoveries of prior-year distributions | 7 | | | |
| 8 | Minimum Asset Amount (add line 7 to line 6) | 8 | | | |
| Sect | ion C - Distributable Amount | | | Current Year | |
| _1_ | Adjusted net income for prior year (from Section A, line 8, Column A) | 1 | | | |
| 2 | Enter 85% of line 1 | 2 | | | |
| 3 | Minimum asset amount for prior year (from Section B, line 8, Column A) | 3 | | | |
| 4 | Enter greater of line 2 or line 3 | 4 | | | |
| 5 | Income tax imposed in prior year | 5 | | | |
| 6 | Distributable Amount. Subtract line 5 from line 4, unless subject to | | | | |
| | emergency temporary reduction (see instructions) | 6 | | | |
| 7 | Check here if the current year is the organization's first as a non-functional | ly integrate | ed Type III supporting orga | anization (see | |
| | instructions). | | | | |

Schedule A (Form 990 or 990-EZ) 2016

| Sche Pa i | dule A (Form 990 or 990-EZ) 2016 JEWISH FAMILY Type III Non-Functionally Integrated 509(| | | 8-0691329 Page 7 |
|---------------------|---|---------------------------------------|--|---|
| Secti | on D - Distributions | , , , , , , , , , , , , , , , , , , , | (continued) | Current Year |
| 1 | Amounts paid to supported organizations to accomplish exer | mpt purposes | | |
| 2 | Amounts paid to perform activity that directly furthers exemp | t purposes of supported | | |
| | organizations, in excess of income from activity | | | |
| 3 | Administrative expenses paid to accomplish exempt purpose | s of supported organizations | } | |
| 4 | Amounts paid to acquire exempt-use assets | | | |
| _5 | Qualified set-aside amounts (prior IRS approval required) | | | |
| _6_ | Other distributions (describe in Part VI). See instructions | | | |
| _7_ | Total annual distributions. Add lines 1 through 6 | | | |
| 8 | Distributions to attentive supported organizations to which the | ne organization is responsive | | |
| | (provide details in Part VI). See instructions | | | |
| 9 | Distributable amount for 2016 from Section C, line 6 | | | |
| 10 | Line 8 amount divided by Line 9 amount | | | |
| Secti | on E - Distribution Allocations (see instructions) | (i) Excess Distributions | (ii) Underdistributions Pre-2016 | (iii) Distributable Amount for 2016 |
| 1 | Distributable amount for 2016 from Section C, line 6 | | | |
| 2 | Underdistributions, if any, for years prior to 2016 (reason- | | | |
| | able cause required- explain in Part VI). See instructions | | | |
| _3_ | Excess distributions carryover, if any, to 2016: | | | |
| a | | | | |
| b | | | | |
| c | From 2013 | | | |
| d | From 2014 | | | |
| e | From 2015 | | | |
| f | Total of lines 3a through e | | | |
| g | Applied to underdistributions of prior years | | | |
| <u>h</u> | Applied to 2016 distributable amount | | | |
| <u>i</u> _ | Carryover from 2011 not applied (see instructions) | | | |
| j_ | Remainder. Subtract lines 3g, 3h, and 3i from 3f. | | | |
| 4 | Distributions for 2016 from Section D, | | | |
| | line 7: \$ | | | |
| <u>a</u> | Applied to underdistributions of prior years | | | |
| <u>b</u> | Applied to 2016 distributable amount | | | |
| <u>c</u> | Remainder. Subtract lines 4a and 4b from 4 | | | |
| 5 | Remaining underdistributions for years prior to 2016, if | | | |
| | any. Subtract lines 3g and 4a from line 2. For result greater | | | |
| | than zero, explain in Part VI. See instructions | | | |
| 6 | Remaining underdistributions for 2016. Subtract lines 3h | | | |
| | and 4b from line 1. For result greater than zero, explain in | | | |
| | Part VI. See instructions | | | |
| 7 | Excess distributions carryover to 2017. Add lines 3j and 4c | | | |
| 8 | Breakdown of line 7: | | | |
| a | DICANDOWITO IIIIC 1. | | | |
| | Excess from 2013 | | | |
| | Excess from 2014 | | | |
| | Excess from 2015 | | | |
| | Excess from 2016 | | | |

Schedule A (Form 990 or 990-EZ) 2016

| Part VI Supplemental Information. Provide the explanations required by Part II, line 10: Part II, line 17a or 17b: Part III, line 12: | |
|---|--|
| Part VI Supplemental Information. Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a, and 3b; Part V, line 1; Part V, Section B, line 1e; Part V, Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. | |
| (See instructions.) | |
| SCHEDULE A, PART II, LINE 10, EXPLANATION FOR OTHER INCOME: | |
| OTHER | |
| 2016 AMOUNT: \$ 67,262. | |
| 2010 IMOON1. | |
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Schedule B (Form 990, 990-EZ, or 990-PF)

Department of the Treasury Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.
 ▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990 .

OMB No. 1545-0047 **2016**

Name of the organization

Employer identification number

JEWISH FAMILY SERVICE 38-0691329

Organization type (check one):

| • | •• , | |
|-----------------------|---|--|
| Filers of | : | Section: |
| Form 990 | 0 or 990-EZ | \overline{X} 501(c)($\overline{3}$) (enter number) organization |
| | | 4947(a)(1) nonexempt charitable trust not treated as a private foundation |
| | | 527 political organization |
| Form 990 | 0-PF | 501(c)(3) exempt private foundation |
| | | 4947(a)(1) nonexempt charitable trust treated as a private foundation |
| | | 501(c)(3) taxable private foundation |
| | | s covered by the General Rule or a Special Rule . 7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions. |
| General | Rule | |
| | - | i filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions. |
| Special | Rules | |
| X | sections 509(a)(1) a any one contributor | described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under 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 r, 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, line 1. Complete Parts I and II. |
| | year, total contribut | described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the tions of more than \$1,000 exclusively for religious, charitable, scientific, literary, or educational purposes, or for ruelty to children or animals. Complete Parts I, II, and III. |
| | year, contributions is checked, enter he purpose. Don't com | described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the exclusively for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box ere the total contributions that were received during the year for an exclusively religious, charitable, etc., nplete any of the parts unless the General Rule applies to this organization because it received nonexclusively e, etc., contributions totaling \$5,000 or more during the year \bigsim \$\frac{1}{2} \] |
| Caution: but it mu | : An organization tha | at isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), 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 ne filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF). |

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2016)

JEWISH FAMILY SERVICE

38-0691329

| Part I | Contributors (See instructions). Use duplicate copies of Part I if additional | al space is needed. | |
|------------|---|----------------------------|--|
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution |
| 1 | | \$ 748,987. | Person X Payroll Noncash (Complete Part II for noncash contributions.) |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution |
| 2 | | \$ 2,146,841. | Person X Payroll Noncash (Complete Part II for noncash contributions.) |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution |
| 3 | | \$617,669. | Person X Payroll |
| (a) | (b) | (c) | (d) |
| No. 4 | Name, address, and ZIP + 4 | * 3,080,754. | Person X Payroll |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution |
| | | \$ | Person Payroll Noncash (Complete Part II for noncash contributions.) |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution |
| | | \$ | Person Payroll Noncash (Complete Part II for noncash contributions.) |

JEWISH FAMILY SERVICE

38-0691329

| 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 | | |
| | | \$ | | | |

| JEWISH Part III | FAMILY SERVICE | | 38-0691329 |
|---------------------------|---|--|---|
| Part III | the year from any one contributor. Complet | e columns (a) through (e) and the follow | n section 501(c)(7), (8), or (10) that total more than \$1,000 for ving line entry. For organizations |
| | completing Part III, enter the total of exclusively religion. Use duplicate copies of Part III if addition | us, charitable, etc., contributions of \$1,000 or le | ess for the year. (Enter this info. once.) |
| (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 |
| | | | |
| | | | <u> </u> |
| Γ | | (e) Transfer of gift | |
| | Transferee's name, address, | and ZIP + 4 | Relationship of transferor to transferee |
| | | | |
| | | | |

SCHEDULE D (Form 990)

Department of the Treasury Internal Revenue Service

Supplemental Financial Statements

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

► Attach to Form 990.

► Information about Schedule D (Form 990) and its instructions is at www.irs.gov/form990.

Open to Public Inspection

OMB No. 1545-0047

Name of the organization

JEWISH FAMILY SERVICE

Employer identification number 38-0691329

| Part | t I Organizations Maintainin | g Donor Advised | Funds or Other Similar Fund | s or Accounts. Complete if the |
|------|---|----------------------------|--|---|
| | organization answered "Yes" on F | Form 990, Part IV, line 6 | | T |
| | | _ | (a) Donor advised funds | (b) Funds and other accounts |
| | Total number at end of year | | | |
| | Aggregate value of contributions to (during | | | |
| | Aggregate value of grants from (during ye | | | |
| | Aggregate value at end of year | | | |
| | Did the organization inform all donors an | | _ | |
| | are the organization's property, subject t | | | |
| | Did the organization inform all grantees, | | | |
| | for charitable purposes and not for the b | | | |
| Part | impermissible private benefit? | | nization answered "Yes" on Form 990 | |
| | | | | J, Part IV, line 7. |
| 1 | Purpose(s) of conservation easements he | , , | ` | intorically important land area |
| | Preservation of land for public use Protection of natural habitat | (e.g., recreation or edu | · — | istorically important land area ertified historic structure |
| | Preservation of open space | | Freservation of a C | ertified historic structure |
| 2 | Complete lines 2a through 2d if the orga | nization hold a qualified | d consequation contribution in the for | m of a conservation easement on the last |
| | day of the tax year. | riization neid a quaiillet | d conservation contribution in the fon | Held at the End of the Tax Yea |
| | Total number of conservation easements | | | |
| | Total acreage restricted by conservation | | | ا م |
| | Number of conservation easements on a | | ture included in (a) | |
| | Number of conservation easements inclu | | | |
| | listed in the National Register | ` ' ' | • | |
| | Number of conservation easements mod | | | |
| | year > | imoa, transionoa, roica | soa, oxungaishoa, or torrimated by t | The organization daring the tax |
| | Number of states where property subject | t to conservation easer | nent is located | |
| | Does the organization have a written poli | | · · · · · · · · · · · · · · · · · · · | vf |
| | violations, and enforcement of the conse | , , , , , , | | |
| | Staff and volunteer hours devoted to mo | | | |
| | > | 0, 1 0, | , | ζ , |
| 7 | Amount of expenses incurred in monitori | ing, inspecting, handlin | g of violations, and enforcing conser | vation easements during the year |
| | ▶ \$ | | | , |
| 8 | Does each conservation easement repor | ted on line 2(d) above s | satisfy the requirements of section 17 | O(h)(4)(B)(i) |
| | and section 170(h)(4)(B)(ii)? | | | Yes No |
| 9 | In Part XIII, describe how the organizatio | | | |
| | include, if applicable, the text of the foot | note to the organization | n's financial statements that describe | s the organization's accounting for |
| | conservation easements. | | | |
| Part | t III Organizations Maintainin | g Collections of A | rt, Historical Treasures, or C | Other Similar Assets. |
| | Complete if the organization answ | vered "Yes" on Form 99 | 90, Part IV, line 8. | |
| 1a | If the organization elected, as permitted | under SFAS 116 (ASC | 958), not to report in its revenue state | ement and balance sheet works of art, |
| | historical treasures, or other similar asset | ts held for public exhib | ition, education, or research in furthe | rance of public service, provide, in Part XIII, |
| | the text of the footnote to its financial sta | atements that describe | s these items. | |
| b | If the organization elected, as permitted | under SFAS 116 (ASC | 958), to report in its revenue stateme | nt and balance sheet works of art, historical |
| | treasures, or other similar assets held for | public exhibition, educ | cation, or research in furtherance of p | public service, provide the following amounts |
| | relating to these items: | | | |
| (| (i) Revenue included on Form 990, Part | t VIII, line 1 | | |
| | (ii) Assets included in Form 990, Part ${\sf X}$ | | | · |
| 2 | If the organization received or held works | s of art, historical treas | ures, or other similar assets for financ | cial gain, provide |
| | the following amounts required to be rep | | | |
| а | Revenue included on Form 990, Part VIII | , line 1 | | |
| b. | Assets included in Form 990, Part X | | | \$ |

| Cobo | dula D./Farm 000) 2016 .TFWTCH 1 | FAMILY SERV | TCF | | | | 38-06 | 91320 |) _D , | 2 |
|-------|--|------------------------|------------------------|-----------------|------------|-----------|-------------|----------------|------------------|--|
| | dule D (Form 990) 2016 JEWISH B Till Organizations Maintaining Co | | | asures, or (| Other S | | | | | age 🗲 |
| 3 | Using the organization's acquisition, accession | | | | | | | , , , | | |
| | (check all that apply): | , | • | · · | · · | | | | | |
| а | Public exhibition | d | Loan or excl | hange program | s | | | | | |
| b | Scholarly research | e | | | | | | | | |
| c | Preservation for future generations | · · | | | | | | | | |
| 4 | Provide a description of the organization's co | allections and explain | how they further th | e organization' | s evemnt | t nurna | sa in Part | XIII | | |
| 5 | During the year, did the organization solicit or | | • | • | • | | oc iiii ait | XIII. | | |
| 3 | to be sold to raise funds rather than to be ma | | • | • | | | | Yes | | No |
| Par | t IV Escrow and Custodial Arrang | | | | | | | | | |
| | reported an amount on Form 990, Par | | to ii the organization | Tanoworda T | 55 01110 | JIIII 00C | ,, , a,, ,, | | | |
| 1a | Is the organization an agent, trustee, custodia | an or other intermedia | ary for contributions | or other asset | s not inc | luded | | | | |
| | on Form 990, Part X? | | | | | | | Yes | | No |
| b | If "Yes," explain the arrangement in Part XIII a | | | | | | | _ | | _ |
| | , , | • | · · | | | | | Amoun | t | |
| С | Beginning balance | | | | | 1c | | | | |
| | Additions during the year | | | | | 1d | | | | |
| | Distributions during the year | | | | | 1e | | | | |
| f | Ending balance | | | | | 1f | | | | |
| | Did the organization include an amount on Fo | | | | | | | Yes | | No |
| | If "Yes," explain the arrangement in Part XIII. | | * | | • | | | 00 | | ֧֝֞֞֝֞֝֞֜֝֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֓֡֓֓֓֓֓֓֓֡֓֓֓֡֓֞֝֡֓֡֓֞֝֓֡֓֡֓֡֞֜ |
| | t V Endowment Funds. Complete if | | | | | | | | | |
| | Somplete II | (a) Current year | (b) Prior year | (c) Two years I | | Three v | ears back | (e) Four | vears | hack |
| 1a | Beginning of year balance | 7,092,494. | 7,491,801. | 6,680, | | | 44,775. | | 175, | |
| | Contributions | 11,500. | 500,000. | 1,046, | | | | | | 123. |
| | Net investment earnings, gains, and losses | 312,822. | -256,039. | 171, | | - 5 | 64,369. | | | 345. |
| | | 011,011. | 188,884. | 192, | | | 86,328. | | | 600. |
| d | Grants or scholarships | | 100,001. | 152, | - | | ,320. | | | |
| е | Other expenditures for facilities | 476,651. | 608,931. | 214, | 114 | | 94,133. | | 67 | 410. |
| | and programs | 19,031. | 000,551. | 214, | 114. | | 47,948. | | | 214. |
| | Administrative expenses | 6,921,134. | 7,092,494. | 7,491, | 0.01 | | 80,735. | | 444, | |
| g | End of year balance | | | | 001. | 0,0 | 00,733. | 0 | , 444, | 173. |
| 2 | Provide the estimated percentage of the curre | ent year end balance | (line 1g, column (a) |) held as: | | | | | | |
| a | Board designated or quasi-endowment | | _% | | | | | | | |
| b | Permanent endowment ► 60.00 | % | | | | | | | | |
| С | | 0.00 % | | | | | | | | |
| | The percentages on lines 2a, 2b, and 2c shou | • | | | | | | | | |
| 3a | Are there endowment funds not in the posses | ssion of the organizat | tion that are held an | id administered | for the c | organiza | ation | ſ | 1 | |
| | by: | | | | | | | | Yes | No |
| | (i) unrelated organizations | | | | | | | 3a(i) | X | |
| | (ii) related organizations | | | | | | | 3a(ii) | X | |
| b | If "Yes" on line 3a(ii), are the related organizate | | | | | | | 3b | Х | |
| 4 | Describe in Part XIII the intended uses of the | | vment funds. | | | | | | | |
| Par | t VI Land, Buildings, and Equipme | | | | | | | | | |
| | Complete if the organization answered | d "Yes" on Form 990, | Part IV, line 11a. S | ee Form 990, F | art X, lin | e 10. | | | | |
| | Description of property | (a) Cost or ot | ` ' | | (c) Acci | | | (d) Boo | k value | е |
| | | basis (investm | ent) basis | (other) | depre | eciation | | | | |
| 1a | Land | | | | | | | | | |
| b | Buildings | | | | | | | | | |
| | Leasehold improvements | | | 6,784. | 2 | 25,0 | 68. | | 1,7 | |
| d | Equipment | | | 2,218. | | 5,3 | | 17 | 5,88 | 82. |
| | Other | | 91 | 6,979. | 60 | 6,6 | 74. | | 3,30 | |
| Total | . Add lines 1a through 1e. (Column (d) must ed | gual Form 990. Part > | (. column (B), line 10 | Oc.) | | | • | 508 | 3,90 | 03. |

Schedule D (Form 990) 2016

| Schedule D (Form 990) 2016 JEWISH FAMI Part VII Investments - Other Securities. | LI SEKVICE | | -0691329 _{Page} |
|--|----------------------------|---------------------------------------|--------------------------|
| | on Form 000 Port IV line 1 | 1h Soo Form 000 Port V line 12 | |
| Complete if the organization answered "Yes" (a) Description of security or category (including name of security) | (b) Book value | (c) Method of valuation: Cost or en | d-of-vear market value |
| , , , , , , , , , , , , , , , , , , , | (b) Book value | (c) methed of valuation. Cook of on | a or your market value |
| (O) Ole a shall sh | | | |
| (3) Other | | | |
| (A) BENEFICIAL INTEREST IN | | | |
| (B) ENDOWMENT FUNDS | 2,806,418. | END-OF-YEAR MARKET | VALUE |
| (C) | | | |
| (D) | | | |
| (E) | | | |
| (F) | | | |
| (G) | | | |
| (H) | | | |
| Total. (Col. (b) must equal Form 990, Part X, col. (B) line 12.) | 2,806,418. | | |
| Part VIII Investments - Program Related. | | | |
| Complete if the organization answered "Yes" | 1 | | |
| (a) Description of investment | (b) Book value | (c) Method of valuation: Cost or en | d-of-year market value |
| (1) | | | |
| (2) | | | |
| (3) | | | |
| (4) | | | |
| (5) | | | |
| (6) | | | |
| (7) | | | |
| (8) | | | |
| (9) | | | |
| Total. (Col. (b) must equal Form 990, Part X, col. (B) line 13.) Part IX Other Assets. | | | |
| Complete if the organization answered "Yes" | on Form 000 Dort IV line 1 | 1d Coo Form 000 Port V line 15 | |
| | Description | Td. See Form 990, Part X, line 15. | (b) Book value |
| (1) | Description | | (b) Book value |
| (2) | | | |
| (3) | | | |
| (4) | | | |
| (5) | | | |
| (6) | | | |
| (7) | | | |
| (8) | | | |
| (9) | | | |
| Total. (Column (b) must equal Form 990. Part X. col. (B) line | e 15.) | > | |
| Part X Other Liabilities. | / | • | • |
| Complete if the organization answered "Ves" | on Form 990 Part IV line 1 | 10 or 11f Soc Form 000 Port V line 25 | : |

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

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

| Schedule D (Form 990) 2016 JEWISH FAMILY SERVICE | | | | 0691329 Page |
|---|---------------------|----------------------|-------------|-----------------------|
| Part XI Reconciliation of Revenue per Audited Financial State | ements With | Revenue per Re | eturn. | |
| Complete if the organization answered "Yes" on Form 990, Part IV, line | e 12a. | | | |
| 1 Total revenue, gains, and other support per audited financial statements | | | 1 | 11,689,689 |
| 2 Amounts included on line 1 but not on Form 990, Part VIII, line 12: | | | | |
| a Net unrealized gains (losses) on investments | 2a | | | |
| b Donated services and use of facilities | 2b | 144,283. | | |
| c Recoveries of prior year grants | | | | |
| d Other (Describe in Part XIII.) | | 312,822. | | |
| e Add lines 2a through 2d | | | 2e | 457,105 11,232,584 |
| 3 Subtract line 2e from line 1 | | | 3 | 11,232,584 |
| 4 Amounts included on Form 990, Part VIII, line 12, but not on line 1: | | | | |
| a Investment expenses not included on Form 990, Part VIII, line 7b | 4a | | | |
| b Other (Describe in Part XIII.) | 4b | -16,338. | | |
| c Add lines 4a and 4b | | | 4c | -16,338 11,216,246 |
| 5 Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line 12.) | | | 5 | |
| Part XII Reconciliation of Expenses per Audited Financial State | tements With | Expenses per l | Retur | n. |
| Complete if the organization answered "Yes" on Form 990, Part IV, line | e 12a. | | | |
| 1 Total expenses and losses per audited financial statements | | | 1 | 11,211,684 |
| 2 Amounts included on line 1 but not on Form 990, Part IX, line 25: | | | | |
| a Donated services and use of facilities | 2a | 144,283. | | |
| b Prior year adjustments | | | | |
| c Other losses | | | | |
| d Other (Describe in Part XIII.) | | 16,338. | | |
| e Add lines 2a through 2d | | | 2e | 160,621 |
| 3 Subtract line 2e from line 1 | | | 3 | 11,051,063 |
| 4 Amounts included on Form 990, Part IX, line 25, but not on line 1: | | | | |
| a Investment expenses not included on Form 990, Part VIII, line 7b | 4a | | | |
| b Other (Describe in Part XIII.) | 4b | | | |
| c Add lines 4a and 4b | | | 4c | 0 |
| 5 Total expenses. Add lines 3 and 4c. (This must equal Form 990, Part I, line 18. |) | | 5 | 11,051,063 |
| Part XIII Supplemental Information. | , | | | |
| Provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; | Part IV, lines 1b | and 2b; Part V, line | 1; Part | X, line 2; Part XI, |
| lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part to provide any | / additional inform | nation. | | |
| | | | | |
| | | | | |
| PART V, LINE 4: | | | | |
| | | | | |
| THE ENDOWMENT FUNDS ARE HELD AND INVESTED | BY THE U | NITED JEWIS | H F | OUNDATION |
| | | | | |
| FOR JEWISH FAMILY SERVICE. THE EARNINGS FR | OM THE E | NDOWMENT FU | <u>INDS</u> | ARE |
| | | | | |
| INTENDED TO HELP THE VARIOUS PROGRAMS ADMI | NISTERED | BY JEWISH | FAM | ILY |
| | | | | |
| SERVICE. ADDITIONALLY, THE COMMUNITY FOUN | DATION O | F SOUTHEAST | ' MI | CHIGAN |
| | | | | |
| HOLDS A SUBSTANTIAL PORTION OF THE ENDOWME | NTS AND | PROVIDES AN | IAN | NUAL |
| | | | | |
| DISBURSMENT TO THE JEWISH FAMILY SERVICE. | | | | |
| | | | | |
| | | | | |
| | | | | |
| PART X, LINE 2: | | | | |
| | | | | |
| JEWISH FAMILY SERVICE HAS RECEIVED NOTIFIC | ATION TH | AT IT QUALI | FIE | S AS A |
| | - > . (-) | | | |
| TAY-EXEMPT ORGANIZATION LINDER SECTION 501/ | C1/3/ OF | क्रमा व्यक्त | ישידות: | DNTAT. |

REVENUE CODE AND CORRESPONDING PROVISIONS OF STATE LAW AND, ACCORDINGLY IS

| Part XIII Supplemental Information (continued) |
|---|
| NOT SUBJECT TO FEDERAL OR STATE INCOME TAXES. HOWEVER, ANY UNRELATED |
| BUSINESS INCOME MAY BE SUBJECT TO TAXATION. ACCOUNTING PRINCIPLES |
| GENERALLY ACCEPTED IN THE UNITED STATES OF AMERICA REQUIRE MANAGEMENT TO |
| EVALUATE TAX POSITIONS TAKEN BY THE ORGANIZATION AND RECOGNIZE A TAX |
| LIABILITY IF THE ORGANIZATION HAS TAKEN AN UNCERTAIN POSITION THAT MORE |
| LIKELY THAN NOT WOULD NOT BE SUBSTANTIATED UPON EXAMINATION BY THE IRS OR |
| OTHER APPLICABLE TAXING AUTHORITIES. |
| |
| PART XI, LINE 2D - OTHER ADJUSTMENTS: |
| INCREASE IN BENEFICIAL INTEREST IN ENDOWMENT 312,822. |
| |
| PART XI, LINE 4B - OTHER ADJUSTMENTS: |
| DIRECT FUNDRAISING EXPENSES -16,338. |
| |
| PART XII, LINE 2D - OTHER ADJUSTMENTS: |
| DIRECT FUNDRAISING EXPENSES 16,338. |
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SCHEDULE G

Department of the Treasury Internal Revenue Service

(Form 990 or 990-EZ)

Supplemental Information Regarding Fundraising or Gaming Activities

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

► Attach to Form 990 or Form 990-EZ.

Information about Schedule G (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990.

OMB No. 1545-0047

Open to Public Inspection

Name of the organization

| | | | Employer identification number |
|--------|--------|---------|--------------------------------|
| TEWISH | FAMILY | SERVICE | 38-0691329 |
| | | | |

| Part I Fundraising Activities. required to complete this part | Complete if the organization answett. | red "Y | 'es" or | n Form 990, Part IV, I | ine 17. Form 990-EZ | filers are not |
|---|--|---|---|--|--|---|
| 1 Indicate whether the organization rais a Mail solicitations b Internet and email solicitations c Phone solicitations d In-person solicitations 2 a Did the organization have a written of key employees listed in Form 990, P b If "Yes," list the 10 highest paid individual compensated at least \$5,000 by the | e Solicitat f Solicitat g Special or oral agreement with any individual art VII) or entity in connection with providuals or entities (fundraisers) pursua | tion of tion of fundra (includ | non-g gover aising ding of onal fo | overnment grants nment grants events fficers, directors, trus undraising services? | Yes | |
| (i) Name and address of individual or entity (fundraiser) | (ii) Activity | have c | Did raiser sustody ntrol of utions? | (iv) Gross receipts from activity | (v) Amount paid to (or retained by) fundraiser listed in col. (i) | (vi) Amount paid to (or retained by) organization |
| | | Yes | No | | | |
| | | | | | | |
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| | | | > | | | |
| 3 List all states in which the organization or licensing. | on is registered or licensed to solicit o | ontrib | utions | or has been notified | it is exempt from re | gistration |
| | | | | | | |
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| 1 6 | art I | Fundraising Events. Complete if the of fundraising event contributions and gr | he organization answered | | | |
|----------------------------|---------------------------------|--|--|-----------------------------------|------------------------|--|
| | | or randraioning event contributions and gr | (a) Event #1 ANNUAL EVENT | (b) Event #2 | (c) Other events NONE | (d) Total events (add col. (a) through |
| | | | (event type) | (event type) | (total number) | col. (c)) |
| Revenue | 1 | Gross receipts | 160,297. | | | 160,297. |
| | 2 | Less: Contributions | 153,347. | | | 153,347. |
| | 3 | Gross income (line 1 minus line 2) | 6,950. | | | 6,950. |
| | | | | | | |
| | 4 | Cash prizes | | | | |
| S | 5 | Noncash prizes | | | | |
| Direct Expenses | 6 | Rent/facility costs | | | | |
| rect E | 7 | Food and beverages | 847. | | | 847. |
| □ | 8 | Entertainment | 3,000. | | | 3,000. |
| | 9 | Other direct expenses | 12,491. | | | 12,491. |
| | 10 | Direct expense summary. Add lines 4 throug | h 9 in column (d) | | > | 16,338. |
| _ | 11 | Net income summary. Subtract line 10 from | line 3, column (d) | | > | -9,388. |
| Pa | art I | | answered "Yes" on Form | 990, Part IV, line 19, or r | eported more than | |
| | Г | \$15,000 on Form 990-EZ, line 6a. | | (b) Pull tabs/instant | | (N Tabal manais a facility |
| e | | | | | | i (d) Total daming lagg |
| | | | (a) Bingo | bingo/progressive bingo | (c) Other gaming | (d) Total gaming (add col. (a) through col. (c) |
| even | | | (a) Bingo | | (c) Other gaming | |
| Revenue | 1 | Gross revenue | (a) Bingo | | (c) Other gaming | |
| Reven | 1 | | (a) Bingo | | (c) Other gaming | |
| | 2 | Gross revenue | (a) Bingo | | (c) Other gaming | |
| | 2 | | (a) Bingo | | (c) Other gaming | (d) Total gaming (add col. (a) through col. (c)) |
| rect Expenses | 2 | Cash prizes | (a) Bingo | | (c) Other gaming | |
| | 2 | Cash prizes Noncash prizes Rent/facility costs | (a) Bingo | | (c) Other gaming | |
| rect Expenses | 2 3 4 | Cash prizes Noncash prizes Rent/facility costs Other direct expenses | (a) Bingo | | (c) Other gaming | col. (a) through col. (c) |
| rect Expenses | 2 3 4 | Cash prizes Noncash prizes Rent/facility costs | | bingo/progressive bingo | | col. (a) through col. (c) |
| rect Expenses | 3 4 5 | Cash prizes Noncash prizes Rent/facility costs Other direct expenses | | bingo/progressive bingo | | col. (a) through col. (c)) |
| rect Expenses | 2 3 4 5 | Cash prizes Noncash prizes Rent/facility costs Other direct expenses Volunteer labor | Yes % No h 5 in column (d) | bingo/progressive bingo Yes% No | Yes%No | col. (a) through col. (c)) |
| Direct Expenses | 2 3 4 5 6 7 8 | Cash prizes Noncash prizes Rent/facility costs Other direct expenses Volunteer labor Direct expense summary. Add lines 2 throug Net gaming income summary. Subtract line 7 | Yes% No h 5 in column (d) from line 1, column (d) | bingo/progressive bingo Yes% No | Yes%No | col. (a) through col. (c)) |
| 6 Direct Expenses | 2 3 4 5 6 7 8 | Cash prizes Noncash prizes Rent/facility costs Other direct expenses Volunteer labor Direct expense summary. Add lines 2 throug Net gaming income summary. Subtract line 7 ter the state(s) in which the organization conditions. | Yes% No h 5 in column (d) from line 1, column (d) ucts gaming activities: | bingo/progressive bingo Yes% No | Yes%No | col. (a) through col. (c) |
| b G Direct Expenses | 2 3 4 5 6 7 8 | Cash prizes Noncash prizes Rent/facility costs Other direct expenses Volunteer labor Direct expense summary. Add lines 2 throug Net gaming income summary. Subtract line 7 ter the state(s) in which the organization conducted the organization licensed to conduct gaming a | Yes% No h 5 in column (d) from line 1, column (d) ucts gaming activities: | bingo/progressive bingo Yes% No | Yes%No | col. (a) through col. (c)) |
| b G Direct Expenses | 2 3 4 5 6 7 8 | Cash prizes Noncash prizes Rent/facility costs Other direct expenses Volunteer labor Direct expense summary. Add lines 2 throug Net gaming income summary. Subtract line 7 ter the state(s) in which the organization conditions. | Yes% No h 5 in column (d) from line 1, column (d) ucts gaming activities: | bingo/progressive bingo Yes% No | Yes%No | col. (a) through col. (c) |
| Direct Expenses | 2 3 4 5 6 7 8 En Isit Isit | Cash prizes Noncash prizes Rent/facility costs Other direct expenses Volunteer labor Direct expense summary. Add lines 2 throug Net gaming income summary. Subtract line 7 ter the state(s) in which the organization conducted the organization licensed to conduct gaming a | Yes% No h 5 in column (d) 7 from line 1, column (d) ucts gaming activities: ctivities in each of these s | yes% No | ☐ Yes % ☐ No ▶ | col. (a) through col. (c)) |

| Sch | nedule G (Form 990 or 990-EZ) 2016 JEWISH FAMILY SERVICE 3 | 8-0691 | 329 | Page 3 |
|----------|--|-------------------|---------|----------|
| | Does the organization conduct gaming activities with nonmembers? | | Yes | No |
| | Is the organization a grantor, beneficiary or trustee of a trust, or a member of a partnership or other entity formed | | | |
| | to administer charitable gaming? | | Yes | ☐ No |
| 13 | Indicate the percentage of gaming activity conducted in: | 1 | | |
| | a The organization's facility | | | <u>%</u> |
| | o An outside facility | 13b | | <u>%</u> |
| 14 | Enter the name and address of the person who prepares the organization's gaming/special events books and records: | | | |
| | Name | | | |
| | Address | | | |
| 15a | a Does the organization have a contract with a third party from whom the organization receives gaming revenue? | | Yes | ☐ No |
| b | o If "Yes," enter the amount of gaming revenue received by the organization 🕨 \$ and the amoun | t | | |
| | of gaming revenue retained by the third party > \$ | | | |
| c | If "Yes," enter name and address of the third party: | | | |
| | Name | | | |
| | Address | | | |
| 16 | Gaming manager information: | | | |
| | Name | | | |
| | | | | |
| | Gaming manager compensation \$ | | | |
| | Description of services provided | | | |
| | | | | |
| | | | | |
| | Director/officer Employee Independent contractor | | | |
| 17 | Mandatory distributions: | | | |
| | a Is the organization required under state law to make charitable distributions from the gaming proceeds to | | | |
| | retain the state gaming license? | | Yes | ☐ No |
| b | Enter the amount of distributions required under state law to be distributed to other exempt organizations or spent in the | пе | | |
| <u> </u> | organization's own exempt activities during the tax year > \$ | | | |
| Pa | Supplemental Information. Provide the explanations required by Part I, line 2b, columns (iii) and (v); and Part | : III, lines 9, 9 | 9b, 10k | o, 15b, |
| _ | 15c, 16, and 17b, as applicable. Also provide any additional information. See instructions | | | |
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| Schedule G | (Form 990 or 990-EZ) | JEWISH FAMILY | SERVICE | 38-0691329 | Page 4 |
|------------|--|--------------------|---------|------------|--------|
| Part IV | (Form 990 or 990-EZ) Supplemental Infor | mation (continued) | | | |
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SCHEDULE I (Form 990)

Department of the Treasury Internal Revenue Service

Name of the organization

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

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

➤ Attach to Form 990.

▶ Information about Schedule I (Form 990) and its instructions is at www.irs.gov/form990.

OMB No. 1545-0047

Open to Public Inspection

Employer identification number

| JEWISH F | AMILY SERV | /ICE | | | | | 38-069132 | J |
|--|-----------------------|------------------------------------|--------------------------|-----------------------------------|--|---------------------------------------|------------------------------------|-------|
| Part I General Information on Grants | and Assistance | | | | | - | | |
| 1 Does the organization maintain records | s to substantiate th | e amount of the grants | or assistance, the | grantees' eligibility | for the grants or assi | stance, and the selection | | |
| criteria used to award the grants or ass | sistance? | | | | | | X Yes | No |
| 2 Describe in Part IV the organization's p | rocedures for mon | itoring the use of grant | funds in the United | d States. | | | | |
| Part II Grants and Other Assistance to | Domestic Organ | izations and Domesti | C Governments. (| Complete if the org | anization answered "\ | Yes" on Form 990, Part I\ | /, line 21, for any | |
| recipient that received more than | | be duplicated if addit | ional space is need | led. | (A) Mathadal at | T T | | |
| Name and address of organization or government | (b) EIN | (c) IRC section (if applicable) | (d) Amount of cash grant | (e) Amount of non-cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of noncash assistance | (h) Purpose of grant or assistance | |
| | | | | | | | | |
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| | | | | | | | | |
| | | | | | | | | |
| 2 Enter total number of section 501(c)(3) 3 Enter total number of other organization | ns listed in the line | 1 table | e line 1 table | | | | • | |
| LHA For Paperwork Reduction Act Notice | e, see me mstruci | 110115 101 F01111 990. | | | | | Schedule I (Form 990) (20 | / 10) |

Part III Grants and Other Assistance to Domestic Individuals. Complete if the organization answered "Yes" on Form 990, Part IV, line 22. Part III can be duplicated if additional space is needed.

| (a) Type of grant or assistance | (b) Number of recipients | (c) Amount of cash grant | (d) Amount of non- cash assistance | (e) Method of valuation (book, FMV, appraisal, other) | (f) Description of noncash assistance |
|---------------------------------|--------------------------|--------------------------|---------------------------------------|---|---------------------------------------|
| | | | | | |
| PRESCRIPTIONS | 23 | 1,609. | 0. | | |
| | | | | | |
| HELTER | 167 | 162,940. | 0. | | |
| | | | | | |
| OMECARE - IN-HOME CLEANING | 431 | 1,115,273. | 0. | | |
| | | | | | |
| RANSPORTATION | 196 | 57,643. | 0. | | |
| | | | | | |
| OOD & CLOTHING | 513 | 397,066. | 0. | | |

Part IV | Supplemental Information. Provide the information required in Part I, line 2; Part III, column (b); and any other additional information.

PART I, LINE 2:

ASSISTANCE IS PROVIDED TO JEWISH FAMILY SERVICE CLIENTS. CLIENTS MUST MEET

VARIOUS REQUIREMENTS FOR ASSISTANCE. THE REQUIREMENTS FOR ASSISTANCE ARE

BASED UPON THE TYPE OF ASSISTANCE AND MAY BE BASED UPON THE REQUIREMENTS

REQUIRED BY THE FUNDING SOURCE, REQUIREMENTS ARE GENERALLY BASED ON CLIENT

INCOME AND OR AGE OF THE RECIPIENT. DOCUMENTATION OF INCOME AND AGE ARE

OBTAINED FROM THE CLIENT AND MAINTANED IN THE CLIENTS FILE. JEWISH FAMILY

SERVICE DOES NOT GIVE CASH TO CLIENTS BUT RATHER PAYS INVOICES DIRECTLY TO

THE VENDOR. TYPICAL PAYMENTS ARE TO HELP CLIENTS REMAIN IN THEIR HOMES, OR

| Schedule I (Form 990) JEWISH FAMI | | | | | 38-0691329 Page |
|---|---------------------------------|--------------------------|---------------------------------------|---|--|
| Part III Continuation of Grants and Other Assistance to | Individuals in the Unite | d States (Schedul | e I (Form 990), Part III | .) | |
| (a) Type of grant or assistance | (b) Number of recipients | (c) Amount of cash grant | (d) Amount of non- cash assistance | (e) Method of valuation (book, FMV, appraisal, other) | (f) Description of non-cash assistance |
| | | | | | |
| MEDICAL | 68. | 149,881. | 0. | | |
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SCHEDULE J (Form 990)

Department of the Treasury

Internal Revenue Service

Compensation Information

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

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

➤ Attach to Form 990.

► Information about Schedule J (Form 990) and its instructions is at www.irs.gov/form990.

OMB No. 1545-0047

Open to Public Inspection

Name of the organization

Part I Questions Regarding Compensation

JEWISH FAMILY SERVICE

Employer identification number 38-0691329

| | Questions negariting compensation | | Yes | No |
|------------|---|-----|-----|----------|
| 1 a | Check the appropriate box(es) if the organization provided any of the following to or for a person listed on Form 990, | | | |
| | Part VII, Section A, line 1a. Complete Part III to provide any relevant information regarding these items. | | | |
| | First-class or charter travel Housing allowance or residence for personal use | | | |
| | Travel for companions Payments for business use of personal residence | | | |
| | Tax indemnification and gross-up payments Health or social club dues or initiation fees | | | |
| | Discretionary spending account Personal services (such as, maid, chauffeur, chef) | | | |
| | Discretionary Speciality account i discretional services (such as, maid, original) | | | |
| b | If any of the boxes on line 1a are checked, did the organization follow a written policy regarding payment or | | | |
| _ | reimbursement or provision of all of the expenses described above? If "No," complete Part III to explain | 1b | | |
| 2 | Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, | 1.0 | | |
| _ | trustees, and officers, including the CEO/Executive Director, regarding the items checked on line 1a? | 2 | | |
| | trustees, and officers, including the OLO/Exceditive birector, regarding the terms effected of fine far. | | | |
| 3 | Indicate which, if any, of the following the filing organization used to establish the compensation of the organization's | | | |
| Ŭ | CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to | | | |
| | establish compensation of the CEO/Executive Director, but explain in Part III. | | | |
| | | | | |
| | | | | |
| | | | | |
| | Form 990 of other organizations X Approval by the board or compensation committee | | | |
| 4 | During the year did any namen listed on Form 000 Part VIII Costian A line to with respect to the filing | | | |
| 4 | During the year, did any person listed on Form 990, Part VII, Section A, line 1a, with respect to the filing | | | |
| | organization or a related organization: | 4- | | v |
| a | Receive a severance payment or change-of-control payment? | 4a | | X |
| b | Participate in, or receive payment from, a supplemental nonqualified retirement plan? | 4b | | X |
| С | Participate in, or receive payment from, an equity-based compensation arrangement? | 4c | | |
| | If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III. | | | |
| | Only continue 504(a)(0) 504(a)(4) and 504(a)(00) arraying times are related in a 5-0 | | | |
| _ | Only section 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9. | | | |
| 5 | For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation | | | |
| | contingent on the revenues of: | | Х | |
| а | The organization? | 5a | Λ | Х |
| b | Any related organization? | 5b | | |
| | If "Yes" on line 5a or 5b, describe in Part III. | | | |
| 6 | For persons listed on Form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation | | | |
| | contingent on the net earnings of: | | | 77 |
| а | The organization? | 6a | | X |
| b | Any related organization? | 6b | | Х |
| | If "Yes" on line 6a or 6b, describe in Part III. | | | |
| 7 | For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments | | | |
| | not described on lines 5 and 6? If "Yes," describe in Part III | 7 | Х | |
| 8 | Were any amounts reported on Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the | | | |
| | initial contract exception described in Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III | 8 | | X |
| 9 | If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in | | | |
| | Regulations section 53.4958-6(c)? | 9 | | <u> </u> |

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

Schedule J (Form 990) 2016

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

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

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

| | (B) Breakdown of | W-2 and/or 1099-MI | SC compensation | (C) Retirement and other deferred | (D) Nontaxable benefits | (E) Total of columns (B)(i)-(D) | (F) Compensation in column (B) | |
|-------------------------|------------------|--------------------------|-------------------------------------|---|-------------------------|------------------------------------|--------------------------------|---|
| (A) Name and Title | | (i) Base compensation | (ii) Bonus & incentive compensation | (iii) Other reportable compensation | compensation | Derients | (6)(1)-(D) | reported as deferred on prior Form 990 |
| (1) PERRY OHREN | (i) | 167,727. | 6,784. | 12,518. | 7,935. | 30,444. | 225,408. | 0. |
| CHIEF EXECUTIVE OFFICER | (ii) | 0. | 0. | 0. | 0. | 0. | 0. | 0. |
| | (i) | | | | | | | |
| | (ii) | | | | | | | |
| | (i) | | | | | | | |
| | (ii) | | | | | | | |
| | (i) | | | | | | | |
| | (ii) | | | | | | | |
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| | (ii) | | | | | | | |
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| | (ii) | | | | | | | |
| | (i) | | | | | | | |
| | (ii) | | | | | | | |

| Part III Supplemental Information |
|--|
| Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II. Also complete this part for any additional information. |
| PART I, LINE 5: |
| THE CHIEF EXECUTIVE OFFICER, PER HIS EMPLOYMENT AGREEMENT, IS ELIGIBLE TO |
| RECEIVE A BONUS OF UP TO 10% OF HIS BASE SALARY BASED ON EXPLICITLY |
| ARTICULATED GOALS. THESE GOALS RELATE TO FUNDRAISING, PROGRAM FEES, |
| PROFESSIONAL DEVELOPMENT AND STRATEGIC PLANNING. |
| |
| PART I, LINE 7: |
| THE CHIEF EXECUTIVE OFFICER, PER HIS EMPLOYMENT AGREEMENT, IS ELIGIBLE TO |
| RECEIVE A BONUS OF UP TO 10% OF HIS BASE SALARY BASED ON EXPLICITLY |
| ARTICULATED GOALS. THESE GOALS RELATE TO FUNDRAISING, PROGRAM FEES, |
| PROFESSIONAL DEVELOPMENT AND STRATEGIC PLANNING. |
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SCHEDULE 0

Internal Revenue Service

(Form 990 or 990-EZ) Department of the Treasury

Supplemental Information to Form 990 or 990-EZ Complete to provide information for responses to specific questions on

Form 990 or 990-EZ or to provide any additional information.

► Attach to Form 990 or 990-EZ. Information about Schedule O (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990. **Open to Public**

OMB No. 1545-0047

Inspection

Name of the organization

JEWISH FAMILY SERVICE

Employer identification number 38-0691329

ORGANIZATION'S PROCESS FOR COMPENSATION ANALYSIS.

Name of the organization **Employer identification number** 38-0691329 JEWISH FAMILY SERVICE REFLECT THE INDIVIDUALS WHO SERVED DURING THE TAX YEAR. 9. PART VIII: ADJUSTED LINES 1A TO 1H TO REFLECT THE CORRECT CLASSIFICATION, IN PART TO ACHIEVE CONSISTENCY WITH FIGURES SHOWN IN SCHEDULE R, PART V FOR RELATED ORGANIZATION, AND TO REMOVE AMOUNTS CONTRIBUTED FOR DONATED SERVICES ORIGINALLY INCLUDED ON PART VIII. ADDED A CORRESPONDING RECONCILING ITEM ON SCHEDULE D, PART XI, LINE 2B. 10. PART VIII, LINES 8A, 8B AND 8C: REPORTED AMOUNTS TO PROPERLY CLASSIFY THE FUNDRAISING EVENT GROSS REVENUE, CONTRIBUTIONS AND DIRECT EXPENSES ON LINES 8A TO 8C. 11. PART VIII, LINE 11 AND PART XI, LINE 9: CHANGED THE PRESENTATION OF THE INCREASE IN BENEFICIAL INTEREST IN ENDOWMENT FUND AS A RECONCILING ITEM AS OPPOSED TO A CURRENT REVENUE ITEM. 12. PART IX, LINE 5: ADDED THE TOTAL COMPENSATION OF OFFICERS OF THE ORGANIZATION LISTED ON PART VII AND SPLIT OUT OF THE AMOUNTS REPORTED ON PART IX, LINE 7. 13. PART IX, LINE 16 OCCUPANCY: ADJUSTED THE AMOUNT RELATED TO DONATED SERVICES FROM THE FUNCTIONAL EXPENSE SCHEDULE AND ADDED A CORRESPONDING RECONCILING ITEM ON SCHEDULE D, PART XII, LINE 2A. 14. PART X, LINE 10A AND LINE 15: MOVED AMOUNTS FOR COLLECTIONS FROM LINE 10A TO OTHER ASSETS. 15. SCHEDULE A, PART II, LINE 1: ADJUSTED THE AMOUNT OF CONTRIBUTIONS RECEIVED FOR FY2017 TO EXCLUDE DONATED SERVICES. 16. SCHEDULE A, PART II: ADJUSTED THE AMOUNT REPORTABLE ON LINE 12 FOR GROSS RECEIPTS FROM RELATED ACTIVITIES TO PROPERLY REFLECT THE PROGRAM REVENUE OF THE ORGANIZATION FOR THE 5-YEAR PRECEDING PERIOD. 17. SCHEDULE A, PART VI: INCLUDED EXPLANATION FOR OTHER REVENUE FEATURED ON SCHEDULE A, PART II

18. SCHEDULE B: THE ORGANIZATION RE-EVALUATED THE THRESHOLD TO REPORT

Name of the organization **Employer identification number** 38-0691329 JEWISH FAMILY SERVICE CERTAIN CONTRIBUTORS ON THE SCHEDULE B AS AN ORGANIZATION EXEMPT UNDER IRC SECTION 170(B)(1)(A)(VI), AND IS PROVIDING THE NAME, ADDRESS, TYPE AND AMOUNT OF DONATION GIVEN TO THE ORGANIZATION DURING THE TAX YEAR FOR THOSE INDIVIDUALS OR ENTITIES WHO MET THE THRESHOLD. 19. SCHEDULE D, PART VI: MOVED THE AMOUNTS IN LINES 1C AND 1D TO COLUMN (B) "COSTS OR OTHER BASIS (OTHER)" AND UPDATED THE CLASSIFICATION OF CERTAIN ASSETS. 20. SCHEDULE D, PARTS XI AND XII: ADDED THE APPROPRIATE RECONCILING ITEMS TO REFLECT THE CHANGES IN PRESENTATION ON THE FORM 990 FOR THE AMENDED CHANGES INCORPORATED DESCRIBED HERE. 21. SCHEDULE G, PART II: ADDED TO REPORT THE DIRECT REVENUE, CONTRIBUTIONS AND EXPENSES OF THE FUNDRAISING EVENT WHICH REPORTED OVER \$15,000 OF RECEIPTS DURING THE TAX YEAR. 22. SCHEDULE J, PART II: THE AMOUNTS FOR TAXABLE COMPENSATION AND NON-TAXABLE BENEFITS FOR OFFICERS ARE BROKEN OUT TO REFLECT THE CORRECT CLASSIFICATION OF COMPENSATION AND HARMONIZE THE REPORTING WITH PART VII. 23. SCHEDULE J, PART I, LINES 5A AND 7 AND PART III: CHECKED "YES" TO BOTH LINES AND PROVIDED THE SUPPLEMENTAL INFORMATION ACCORDINGLY. 24. SCHEDULE R, PART V, LINE 2: ADJUSTED THE AMOUNTS REPORTABLE AS A CONTRIBUTION FROM RELATED ORGANIZATIONS TO ALIGN WITH THE AMOUNTS ON PART VIII AND SCHEDULE B. FORM 990, PART VI, SECTION A, LINE 2: GEOFFREY ORLEY, RANDALL ORLEY AND MELISSA ORLEY LAX HAVE FAMILY RELATIONSHIPS.

Name of the organization

JEWISH FAMILY SERVICE

Employer identification number
38-0691329

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

AFTER COMPLETION OF THE FORM 990 ALL MEMBERS OF THE BOARD ARE SENT A COPY

OF THE FORM 990 TO REVIEW. BOARD MEMBERS ARE GIVEN TIME TO REVIEW THE 990,

ASK QUESTIONS, AND MAKE RECOMMENDATIONS FOR CHANGE TO THE 990 BEFORE IT IS

FINALIZED AND SUBMITTED TO THE INTERNAL REVENUE SERVICE.

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

ENFORCEMENT OF CONFLICTS POLICY - A LETTER IS SENT OUT ANNUALLY TO MEMBERS OF THE GOVERNING BODY DESCRIBING WHAT A "CONFLICT OF INTEREST" IS. A NEW CONFLICT OF INTEREST DISCLOSURE STATEMENT IS ENCLOSED AND REQUESTS EACH MEMBER TO SIGN AND RETURN THE FORM. THE CONFLICT OF INTEREST POLICY STATES THAT KEY INDIVIDUALS, MEMBERS OF THE GOVERNING BODY, MAY NOT UNDULY INFLUENCE OR SHOW FAVORTISM IN THEIR DECISION-MAKING PROCESS, AND THAT BECAUSE OF VARIED INTEREST AND INVOLVEMENT, THEIR SERVICE MAY AT CERTAIN TIMES RESULT IN SITUATIONS INVOLVING REAL OR APPARENT CONFLICTS OF INTEREST. THE POLICY FURTHER STATES THAT A POTENTIAL CONFLICT OF INTEREST SITUATION MAY ARISE WHERE KEY INDIVIDUALS, MEMBERS OF THE GOVERNING BODY, HAVE A DIRECT OR INDIRECT FINANCIAL INTEREST, OR APPEAR TO HAVE A FINANCIAL INTEREST IN A TRANSACTION. THIS INCLUDES BUT IS NOT LIMITED TO, PROVIDING PROFESSIONAL OR OTHER SERVICES OR PRODUCTS IN THE NORMAL COURSE OF BUSINESS TO JEWISH FAMILY SERVICE. KEY INDIVIDUALS, MEMBERS OF THE GOVERNING BODY, SHALL DISCLOSE, IN WRITING, OF ANY CONFLICT OF INTEREST. THIS KEY INDIVIDUAL, MEMBER OF THE GOVERNING BODY, SHALL NOT PARTICIPATE IN ANY STAGE OF DISCUSSIONS, DELIBERATIONS, OR OTHER DECISIONS REGARDING THE MATTER. THE MINUTES OF THE MEETING SHALL REFLECT THE DISCLOSURE WAS MADE, THE VOTE TAKEN AND, WHERE APPLICATION, THE ABSTENTION FROM VOTING AND PARTICIPATION OF THE KEY INDIVIDUAL, MEMBER OF THE GOVERNING BODY.

Name of the organization **Employer identification number** 38-0691329 JEWISH FAMILY SERVICE FORM 990, PART VI, SECTION B, LINE 15A: THE COMPENSATION PROCESS FOR DETERMINING THE TOP OFFICIAL, CHIEF EXECTUIVE OFFICER'S COMPENSATION INVOLVES UTILIZING DATA OF COMPARABLE COMPENSATION FOR SIMILARLY QUALIFIED PERSONS OF LOCAL AND NATIONAL ORGANIZATIONS AND POSITIONS. THE CHIEF EXECUTIVE OFFICER'S COMPENSATION IS FURTHER NEGOTIATED WITH MEMBERS OF THE GOVERNING BODY. CONTEMPORANEOUS DOCUMENTATION AND RECORD KEEPING WITH RESPECT TO DELIBERATIONS AND DECISIONS REGARDING THE COMPENSATION ARRANGEMENT OCCURS. THERE IS A WRITTEN EMPLOYMENT CONTRACT. THE WRITTEN EMPLOYMENT AGREEMENT GOVERNING THE MAJORITY OF THE FISCAL YEAR ENDED MAY 31, 2017 WAS EFFECTIVE AS OF SEPTEMBER 1, 2016 AND HAD A TERM FROM SEPTEMBER 1, 2016 THROUGH AUGUST 31, 2018. THE WRITTEN EMPLOYMENT CONTRACT STIPULATED A SALARY REVIEW ON OR BEFORE SEPTEMBER 1, 2017. FORM 990, PART VI, SECTION C, LINE 19: THE GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICY, AND FINANCIAL STATEMENTS ARE AVAILABLE TO THE PUBLIC UPON REQUEST. FORM 990, PART XI, LINE 9, CHANGES IN NET ASSETS: INCREASE IN BENEFICIAL INTEREST IN ENDOWMENT 312,822. FORM 990, PART XII, LINE 2C: JEWISH FAMILY SERVICE HAS AN AUDIT COMMITTEE THAT ASSUMES RESPONSIBILITY FOR OVERSIGHT OF THE AUDIT AND SELECTION OF AN INDEPENDENT ACCOUNTING FIRM. THERE HAS BEEN NO CHANGE TO THE PROCEDURES FOLLOWED IN PAST YEARS.

SCHEDULE R (Form 990)

Related Organizations and Unrelated Partnerships

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

Attach to Form 990.

Department of the Treasury Internal Revenue Service Name of the organization

▶ Information about Schedule R (Form 990) and its instructions is at www.irs.gov/form990.

OMB No. 1545-0047

Open to Public Inspection

Employer identification number

| JEWISH FAMILY | SERVICE | | | | 38-0691329 |
|---|-------------------------------------|---|-----------------------|---------------------------|-------------------------------|
| Part I Identification of Disregarded Entities. Complete | e if the organization answered "Yes | on Form 990, Part IV, line 33. | | | |
| (a) Name, address, and EIN (if applicable) of disregarded entity | (b) Primary activity | (c) Legal domicile (state or foreign country) | (d) Total income | (e) End-of-year assets | (f) Direct controlling entity |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| Part II Identification of Related Tax-Exempt Organizations during the tax year. | ions. Complete if the organization | answered "Yes" on Form 990, Pa | rt IV, line 34 becaus | se it had one or more | related tax-exempt |

(a) (b) (c) (e) (g) Section 512(b)(13) Name, address, and EIN Legal domicile (state or **Exempt Code** Public charity Direct controlling Primary activity controlled of related organization section status (if section entity entity? foreign country) 501(c)(3)) Yes No JEWISH FEDERATION OF METROPOLITAN DETROIT -CENTRAL COMMUNAL 38-1359214, 6735 TELEGRAPH ROAD, BLOOMFIELD ORGANIZATION FOR THE HILLS, MI 48304 JEWISH COMMUNITY MICHIGAN 501(C)(3) LINE 7 Х UNITED JEWISH FOUNDATION - 38-1360585 6735 TELEGRAPH ROAD HOLDS PROPERTY AND BLOOMFIELD HILLS, MI 48304 INVESTMENTS MICHIGAN 501(C)(3) LINE 7 Х

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

Page 2

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

| (a) | (b) | (c) | (d) | (e) | (f) | (g) | (h) | | (i) | (| j) | (k) |
|--|------------------|---|---------------------------|--|-----------------------|-----------------------------------|-----|---|-----------------|--------------------------|----|-------------------------|
| Name, address, and EIN of related organization | Primary activity | Legal domicile (state or foreign | Direct controlling entity | Predominant income (related, unrelated, excluded from tax under sections 512-514) | Share of total income | Share of end-of-year assets | I | Disproportionate allocations? Code amount 20 of So | | in box managing partner? | | Percentage ownership |
| | | country) | | sections 512-514) | | | Yes | No | K-1 (Form 1065) | Yes No | | |
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Identification of Related Organizations Taxable as a Corporation or Trust. Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related organizations treated as a corporation or trust during the tax year.

| (a) Name, address, and EIN of related organization | (b) Primary activity | (c) Legal domicile (state or foreign country) | (d) Direct controlling entity | (e) Type of entity (C corp, S corp, or trust) | (f) Share of total income | (g) Share of end-of-year assets | (h) Percentage ownership | | tion b)(13) rolled tity? |
|--|--------------------------------|---|-------------------------------|---|--|--|--------------------------------|-----|-----------------------------------|
| | | country | | | | | | Yes | No |
| | | | | | | | | | |
| | | | | | | | | | |
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| | | | | | | | | | |

Page 3

X

Yes No

Note: Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.

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

1 During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?

| a Receipt of (i) interest, (ii) annuities, (iii) royalties, or (iv) rent from a controlled entity | y | | | | 1a | | X |
|---|---------------------|------------------------------|------------------------------|----------------------|------------|--------|----------|
| b Gift, grant, or capital contribution to related organization(s) | | | | | 1b | | X |
| c Gift, grant, or capital contribution from related organization(s) | | | | | 1c | Х | |
| d Loans or loan guarantees to or for related organization(s) | | | | | 1d | | X |
| e Loans or loan guarantees by related organization(s) | | | | | 1e | | X |
| | | | | | | | |
| f Dividends from related organization(s) | | | | | 1f | | X |
| g Sale of assets to related organization(s) | | | | | 1g | | <u>X</u> |
| h Purchase of assets from related organization(s) | | | | | 1h | | <u>X</u> |
| i Exchange of assets with related organization(s) | | | | | 1i | | X |
| j Lease of facilities, equipment, or other assets to related organization(s) | | | | | 1j | | <u>X</u> |
| | | | | | | | |
| k Lease of facilities, equipment, or other assets from related organization(s) | | | | | 1k | Х | |
| I Performance of services or membership or fundraising solicitations for related organ | nization(s) | | | | 11 | | _X_ |
| m Performance of services or membership or fundraising solicitations by related organ | nization(s) | | | | 1m | | _X_ |
| n Sharing of facilities, equipment, mailing lists, or other assets with related organization | on(s) | | | | 1n | | <u>X</u> |
| Sharing of paid employees with related organization(s) | | | | | 10 | | <u>X</u> |
| | | | | | | | |
| p Reimbursement paid to related organization(s) for expenses | | | | | 1 p | | X |
| q Reimbursement paid by related organization(s) for expenses | | | | | 1q | | X |
| | | | | | | | |
| r Other transfer of cash or property to related organization(s) | | | | | 1r | | _X_ |
| s Other transfer of cash or property from related organization(s) | | | | | 1s | | X |
| 2 If the answer to any of the above is "Yes," see the instructions for information on w | ho must complete th | is line, including covered r | elationships and transaction | n thresholds. | | | |
| (a) | (b) | (c) | | (d) | | | |
| (a) Name of related organization | Transaction | Amount involved | Method of de | termining amount inv | olved | | |
| | type (a-s) | | | | | | |
| | | | | | | | |
| (1) JEWISH FEDERATION OF METROPOLITAN DETROIT | С | 3,080,754. | CASH | | | | |
| | | | | | | | |
| (2) UNITED JEWISH FOUNDATION | K | 144,283. | FMV | | | | |
| | | | | | | | |
| (3) | | | | | | | |
| | | | | | | | |
| (4) | | | | | | | |
| | | | | | | | |
| (5) | | | | | | | |
| | | | | | | | |
| (6) | | | | | | | |
| 332163 09-06-16 | | | | Schedule | R (Forn | n 990) | 2016 |

Page 4

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

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

| (a) Name, address, and EIN of entity | (b) Primary activity | (c) Legal domicile (state or foreign country) | (d) Predominant income (related, unrelated, excluded from tax under sections 512-514) | Are all partners sec 501(c)(3) orgs.? | (g) Share of end-of-year assets | Dispretion allocat | opor- late tions? | | General manage partner | (k) Percentage ownership |
|--|-------------------------|---|---|---------------------------------------|--|--------------------|-------------------------|----------|------------------------|--------------------------|
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Form **8868**

(Rev. January 2017)

Department of the Treasury Internal Revenue Service

Application for Automatic Extension of Time To File an Exempt Organization Return

File a separate application for each return.

▶ Information about Form 8868 and its instructions is at www.irs.gov/form8868 .

OMB No. 1545-1709

Electronic filing (e-file). You can electronically file Form 8868 to request a 6-month automatic extension of time to file any of the forms listed below with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, for which an extension request must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www irs gov/efile, click on Charities & Non-Profits, and click on e-file for Charities and Non-Profits

Contracts, for which an extension request must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/efile, click on Charities & Non-Profits, and click on e-file for Charities and Non-Profits. Automatic 6-Month Extension of Time. Only submit original (no copies needed). All corporations required to file an income tax return other than Form 990-T (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns. Enter filer's identifying number Name of exempt organization or other filer, see instructions. Employer identification number (EIN) or Type or print 38-0691329 JEWISH FAMILY SERVICE File by the Number, street, and room or suite no. If a P.O. box, see instructions. Social security number (SSN) due date for filina vour 6555 WEST MAPLE ROAD return. See instructions City, town or post office, state, and ZIP code. For a foreign address, see instructions. 48322 WEST BLOOMFIELD, MI Enter the Return Code for the return that this application is for (file a separate application for each return) **Application** Return **Application** Return Code Is For Code Is For Form 990-T (corporation) Form 990 or Form 990-EZ 01 07 Form 990-BL 02 Form 1041-A 08 Form 4720 (individual) 03 Form 4720 (other than individual) 09 Form 5227 10 Form 990-PF Ω4 Form 990-T (sec. 401(a) or 408(a) trust) 05 Form 6069 11 Form 990-T (trust other than above) 06 Form 8870 12 CINDY THORNTON The books are in the care of ► 6555 WEST MAPLE ROAD - WEST BLOOMFIELD, MI 48322 Telephone No. \triangleright (248)592-2300Fax No. If the organization does not have an office or place of business in the United States, check this box If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) . If this is for the whole group, check this box 🕨 🔲 . If it is for part of the group, check this box 🕨 🦳 and attach a list with the names and EINs of all members the extension is for. I request an automatic 6-month extension of time until APRIL 15, 2018, to file the exempt organization return for the organization named above. The extension is for the organization's return for: ___ calendar year ightharpoonup |X| tax year beginning JUN 1, 2016 , and ending MAY 31, 2017 If the tax year entered in line 1 is for less than 12 months, check reason: Initial return

Caution: If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

LHA For Privacy Act and Paperwork Reduction Act Notice, see instructions.

by using EFTPS (Electronic Federal Tax Payment System). See instructions.

If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any

If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.

Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required,

Change in accounting period

nonrefundable credits. See instructions.

Form 8868 (Rev. 1-2017)

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