

EXTENDED TO NOVEMBER 15, 2019

Return of Private Foundation

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

Form 990-PF

Department of the Treasury
Internal Revenue Service

- ▶ Do not enter social security numbers on this form as it may be made public
▶ Go to www.irs.gov/Form990PF for instructions and the latest information

OMB No 1545-0052

2018

Open to Public Inspection

For calendar year 2018 or tax year beginning

, and ending

Name of foundation

A Employer identification number

MICHAEL J. MUNGO FOUNDATION

13-4203429

Number and street (or P.O. box number if mail is not delivered to street address)

Room/suite

441 WESTERN LANE

B Telephone number

808 407-4534

City or town, state or province, country, and ZIP or foreign postal code

IRMO, SC 29063

C If exemption application is pending, check here ☐

G Check all that apply

☐

Initial return

☐

Initial return of a former public charity

☐

Final return

☐

Amended return

☐

Address change

☐

Name change

D 1 Foreign organizations, check here ☐2 Foreign organizations meeting the 85% test, check here and attach computation ☐

H Check type of organization

☒

Section 501(c)(3) exempt private foundation

☐ Section 4947(a)(1) nonexempt charitable trust☐

Other taxable private foundation

E If private foundation status was terminated under section 507(b)(1)(A), check here ☐

I Fair market value of all assets at end of year

J Accounting method.

☒

Cash

☐

Accrual

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

(from Part II, col (c), line 16)

☐ Other (specify)

\$ 32,030,617. (Part I, column (d) must be on cash basis)

Part I Analysis of Revenue and Expenses

(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))

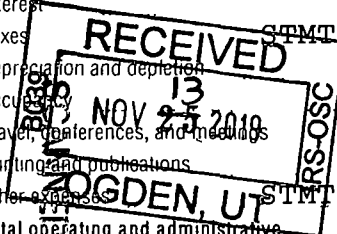
(a) Revenue and expenses per books

(b) Net investment income

(c) Adjusted net income

(d) Disbursements for charitable purposes (cash basis only)

Revenue	1	Contributions, gifts, grants, etc., received	7,574,697.		N/A	
	2	Check ☐ if the foundation is not required to attach Sch. B				
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	539,799.	539,799.		STATEMENT 1
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	1,536,236.			
	b	Gross sales price for all assets on line 6a	8,706,255.			
	7	Capital gain net income (from Part IV, line 2)		1,536,236.		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
Operating and Administrative Expenses	b	Less: Cost of goods sold				
	c	Gross profit or (loss)				
	11	Other income				
	12	Total. Add lines 1 through 11	9,650,732.	2,076,035.		
	13	Compensation of officers, directors, trustees, etc.	39,000.	0.		39,000.
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees				
	b	Accounting fees	STMT 2 10,375.	0.		10,375.
	c	Other professional fees	STMT 3 444.	0.		444.
	17	Interest				
	18	Taxes	STMT 4 2,983.	0.		2,983.
	19	Depreciation and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings	5,499.	0.		5,499.
	22	Printing and publications				
	23	Other expenses	STMT 5 115,168.	113,811.		1,357.
	24	Total operating and administrative expenses. Add lines 13 through 23	173,469.	113,811.		59,658.
	25	Contributions, gifts, grants paid	1,131,376.			1,131,376.
	26	Total expenses and disbursements. Add lines 24 and 25	1,304,845.	113,811.		1,191,034.
	27	Subtract line 26 from line 12	8,345,887.			
	a	Excess of revenue over expenses and disbursements		1,962,224.		
	b	Net investment income (if negative, enter -0-)				
	c	Adjusted net income (if negative, enter -0-)			N/A	



930

4

Part II Balance Sheets Attached schedules and amounts in the description column should be for end of year amounts only

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	178,821.	357,184.	357,184.
	2 Savings and temporary cash investments	1,019,771.	2,176,033.	2,176,033.
	3 Accounts receivable ▶			
	Less allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 7	15,936,783.	20,818,459.	28,038,760.
	c Investments - corporate bonds STMT 8	1,626,735.	1,476,598.	1,458,640.
	11 Investments - land, buildings, and equipment basis ▶			
Less accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other				
14 Land, buildings, and equipment basis ▶				
Less accumulated depreciation ▶				
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	18,762,110.	24,828,274.	32,030,617.	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
23 Total liabilities (add lines 17 through 22)	0.	0.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐			
	and complete lines 24 through 26, and lines 30 and 31			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒			
	and complete lines 27 through 31			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.	
29 Retained earnings, accumulated income, endowment, or other funds	18,762,110.	24,828,274.		
30 Total net assets or fund balances	18,762,110.	24,828,274.		
31 Total liabilities and net assets/fund balances	18,762,110.	24,828,274.		

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	18,762,110.
2 Enter amount from Part I, line 27a	2	8,345,887.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	27,107,997.
5 Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 6	5	2,279,723.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	24,828,274.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse, or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a PUBLICLY TRADED SECURITIES	P		
b PUBLICLY TRADED SECURITIES	P		
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 2,086,391.		2,389,400.	-303,009.
b 6,619,864.		4,780,619.	1,839,245.
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			-303,009.
b			1,839,245.
c			
d			
e			

2 Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	1,536,236.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6). If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	3	N/A

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation doesn't qualify under section 4940(e). Do not complete this part.

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2017	1,192,099.	22,861,699.	.052144
2016	877,704.	17,982,507.	.048809
2015	888,625.	16,862,973.	.052697
2014	947,359.	16,583,527.	.057127
2013	232,306.	11,434,488.	.020316

2 Total of line 1, column (d)	2	.231093
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years	3	.046219
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	27,912,237.
5 Multiply line 4 by line 3	5	1,290,076.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	19,622.
7 Add lines 5 and 6	7	1,309,698.
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions	8	1,191,034.

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

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1		
• Date of ruling or determination letter _____ (attach copy of letter if necessary-see instructions)		
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b		1 39,244.
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations, enter 4% of Part I, line 12, col (b)		
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)		2 0.
3 Add lines 1 and 2		3 39,244.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)		4 0.
5 Tax based on investment income Subtract line 4 from line 3 If zero or less, enter -0-		5 39,244.
6 Credits/Payments		
a 2018 estimated tax payments and 2017 overpayment credited to 2018	6a 17,836.	
b Exempt foreign organizations - tax withheld at source	6b 0.	
c Tax paid with application for extension of time to file (Form 8868)	6c 0.	
d Backup withholding erroneously withheld	6d 0.	
7 Total credits and payments Add lines 6a through 6d	7 17,836.	
8 Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached	8 690.	
9 Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed	9 22,098.	
10 Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	
11 Enter the amount of line 10 to be: Credited to 2019 estimated tax ☐ Refunded ☐	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition. If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ☐ \$ 0. (2) On foundation managers ☐ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered. See instructions ☐ SC		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2018 or the tax year beginning in 2018? See the instructions for Part XIV. If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	X	

N/A

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Part VII-A Statements Regarding Activities (continued)

	Yes	No
11. At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.		X
12. Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions.		X
13. Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address: <u>N/A</u>	X	
14. The books are in care of: <u>BETH DERIDDER</u> Telephone no: <u>803 407-4534</u> Located at: <u>2033 KENNERLY ROAD, IRMO, SC</u> ZIP+4: <u>29063</u>		
15. Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here ☐ and enter the amount of tax-exempt interest received or accrued during the year: <u>15</u> N/A		
16. At any time during calendar year 2018, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country: <u></u>		X

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

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

	Yes	No
1a. During the year, did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No (6) Agree to pay money or property to a government official? (Exception: Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No		
b. If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions. Organizations relying on a current notice regarding disaster assistance, check here. <u>N/A</u>		
c. Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2018? <u></u>		X
2. Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)): a. At the end of tax year 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2018? ☐ Yes ☒ No If "Yes," list the years: <u></u> b. Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) <u>N/A</u> c. If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here: <u></u>		
3a. Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No b. If "Yes," did it have excess business holdings in 2018 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2018.) <u>N/A</u>		
4a. Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? b. Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2018?		X

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

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

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

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

N/A

5b

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

☒

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d)

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

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

6b

X

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?

☐ Yes ☒ No**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 10		39,000.	0.	0.

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

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

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

0

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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services

0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

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

	Amount
1 N/A	
2	
All other program-related investments. See instructions	
3	

Total. Add lines 1 through 3

0.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	27,648,013.
b	Average of monthly cash balances	1b	689,283.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	28,337,296.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	28,337,296.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	425,059.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	27,912,237.
6	Minimum investment return. Enter 5% of line 5	6	1,395,612.

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

1	Minimum investment return from Part X, line 6	1	1,395,612.
2a	Tax on investment income for 2018 from Part VI, line 5	2a	39,244.
b	Income tax for 2018 (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	39,244.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,356,368.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	1,356,368.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	1,356,368.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	1,191,034.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	1,191,034.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,191,034.

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

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2017	(c) 2017	(d) 2018
1 Distributable amount for 2018 from Part XI, line 7				1,356,368.
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only			0.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2018				
a From 2013				
b From 2014				
c From 2015				
d From 2016				
e From 2017	4,244.			
f Total of lines 3a through e	4,244.			
4 Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ 1,191,034.				
a Applied to 2017, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2018 distributable amount				1,191,034.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a).)	4,244.			4,244.
6 Enter the net total of each column as indicated below.				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount - see instructions		0.		
e Undistributed income for 2017. Subtract line 4a from line 2a. Taxable amount - see instr			0.	
f Undistributed income for 2018. Subtract lines 4d and 5 from line 1 This amount must be distributed in 2019				161,090.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2013 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2019 Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9				
a Excess from 2014				
b Excess from 2015				
c Excess from 2016				
d Excess from 2017				
e Excess from 2018				

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
AMERICAN RED CROSS 2751 BULL ST COLUMBIA, SC 29201	NONE	PC	CONTRIBUTION TOWARDS OPERATING COSTS	25,000.
CAROLINA EXCEPTIONAL STUDENT ALLIANCE 6 PENNIGAIL COURT IRMO, SC 29063	NONE	PC	OPERATING COSTS	1,000.
CAROLINA WILDLIFE CARE 5551 BUSCH RIVER RD COLUMBIA, SC 29212	NONE	PC	OPERATING COSTS SUPPORT	1,000.
CENTRAL CAROLINA COMMUNITY FOUNDATION 2711 MIDDLEBURG PLAZA, STE 214 COLUMBIA, SC 29204	NONE	PC	TO RESTORE MICHAEL'S GARDEN HOME	230,000.
COLUMBIA MUSEUM OF ART P.O. BOX 2068 COLUMBIA, SC 29202	NONE	PC	CONTRIBUTION TOWARDS OPERATING EXPENSES	3,500.
Total			SEE CONTINUATION SHEET(S)	1,131,376.
b Approved for future payment				
NONE				
Total				0.

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

(a)
Business
code

(b)
Amount

(C)	Exclusion code
-----	----------------

(d)
Amount

Related or exempt
function income

1 Program service revenue

2 Membership dues and assessments

3 Interest on savings and temporary cash investments

4 Dividends and interest from securities

5 Net rental income or (loss) from real estate

a Debt-financed property

b Not debt-financed property

6 Net rental income or (loss) from personal property

7 Other investment income

8 Gain or (loss) from sales of assets other than inventory

9 Net income or (loss) from special events

10 Gross profit or (loss) from sales of inventory

11 Other revenue:

a

b

C

d

e

12 Subtotal Add columns (b), (d), and (e)

13 Total Add line 12, columns (b), (d), and (e)

(See worksheet in line 13 instructions to verify calculations.)

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

Line No

▼

Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes)

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

1. Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

a Transfers from the reporting foundation to a noncharitable exempt organization of

- (1) Cash
- (2) Other assets

b Other transactions

- (1) Sales of assets to a noncharitable exempt organization
- (2) Purchases of assets from a noncharitable exempt organization
- (3) Rental of facilities, equipment, or other assets
- (4) Reimbursement arrangements
- (5) Loans or loan guarantees
- (6) Performance of services or membership or fundraising solicitation

c. Sharing of facilities, equipment, mailing lists, other assets, or paid employees

d. If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.

	Yes	No
1a(1)		X
1a(2)		X
1b(1)		X
1b(2)		X
1b(3)		X
1b(4)		X
1b(5)		X
1b(6)		X
1c		X

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527?

☐ Yes ☒ No

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

**Sign
Here**

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

Signature of officer or trustee XGuzabtn m. Duridar X 11-12-19
Date

Date _____

of which preparer has any knowledge

CEO AND
SECRETARY/TREAS

Title

May the IRS discuss this return with the preparer shown below? See instr

☒ Yes ☐ No

**Paid
Preparer
Use Only**

Print/Type preparer's name

SHARON C. NORRIS
CPA

Preparer's signature

Preparer's signature	Date 11/
Sharon C. Norris, CPA	
S/LLP	

Date 11/11/19

Check ☐ self-employed

PTIN

P00106174

Firm's name ► WEBSTER ROGERS LLP

Firm's EIN ▶ 57-0776381

Firm's address ► 1320 MAIN ST STE 300
COLUMBIA, SC 29201

Phone no 803-312-0001

Form **990-PF** (2018)

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.
▶ Go to www.irs.gov/Form990 for the latest information

OMB No 1545 0047

2018

Name of the organization

MICHAEL J. MUNGO FOUNDATION

Employer identification number

13-4203429

Organization type (check one)

Filers of

Section

Form 990 or 990-EZ

☐

501(c)() (enter number) organization

☐4947(a)(1) nonexempt charitable trust **not** treated as a private foundation☐

527 political organization

Form 990 PF

☒

501(c)(3) exempt private foundation

☐

4947(a)(1) nonexempt charitable trust treated as a private foundation

☐

501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.**Note:** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.**General Rule**☒

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

Special Rules☐

For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000, or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I (entering "N/A" in column (b) instead of the contributor name and address), II, and III.☐For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. ▶ \$ _____

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

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) (2018)

Name of organization

Employer identification number

MICHAEL J. MUNGO FOUNDATION

13-4203429

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	M. STEWART MUNGO 441 WESTERN LANE IRMO, SC 29063	\$ 3,258,259.	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
2	STEVE W. MUNGO 441 WESTERN LANE IRMO, SC 29063	\$ 4,316,438.	Person ☒ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Name of organization	Employer identification number
MICHAEL J. MUNGO FOUNDATION	13-4203429

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
<u>1</u>	<u>STOCKS CONTRIBUTED (SEE ATTACHED</u> <u>DETAIL)</u>	\$ <u>3,258,259.</u>	
<u>2</u>	<u>STOCKS CONTRIBUTED (SEE ATTACHED</u> <u>DETAIL)</u>	\$ <u>2,316,439.</u>	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	

Name of organization

Employer identification number

MICHAEL J. MUNGO FOUNDATION

13-4203429

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

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
COLUMBIA MUSIC FESTIVAL ASSOCIATION 914 PULASKI ST COLUMBIA, SC 29201	NONE	PC	OPERATING COSTS SUPPORT	1,000.
COMMUNITIES IN SCHOOLS 2712 MIDDLEBURG DR COLUMBIA, SC 29204	NONE	PC	CONTRIBUTION TOWARDS OPERATING COSTS	3,000.
DICKERSON CHILDREN'S FAMILY CENTER 140 GIBSON RD LEXINGTON, SC 29072	NONE	PC	PROVIDE SERVICES TO CHILDREN WHO HAVE BEEN SEXUALLY AND PHYSICALLY ABUSED	5,000.
DISTRICT 5 OF LEX AND RICHLAND COUNTIES P.O. BOX 129 BALLENTINE, SC 29002	NONE	PC	CONTRIBUTION TOWARDS PUBLIC SCHOOL SUPPORT	24,882.
DISTRICT 5 FOUNDATION P.O. BOX 129 BALLENTINE, SC 29002	NONE	PC	CONTRIBUTION TOWARDS PROGRAMMING COSTS IN LEXINGTON/RICHLAND SCHOOL DISTRICT 5	2,000.
EPISCOPAL CHURCH OF THE GOOD SHEPHERD 1512 BLANDING ST COLUMBIA, SC 29201	NONE	PC	ANNUAL DONATION	10,000.
ETV ENDOWMENT 401 E KENNEDY ST., B1 SPARTANBURG, SC 29302	NONE	PC	CONTRIBUTION TOWARDS OPERATING EXPENSES	1,000.
FAMILY SHELTER 2411 TWO KNOTCH ROAD COLUMBIA, SC 29204	NONE	PC	CONTRIBUTIONS FOR OPERATING COSTS	25,000.
HAMMOND SCHOOL 854 GALWAY LANE COLUMBIA, SC 29209	NONE	GOV	DONATION FOR SCHOLARSHIPS FOR LOW-TO-MODERATE-INCOME STUDENTS	50,000.
HARVEST HOPE FOOD BANK 2220 SHOP ROAD COLUMBIA, SC 29201	NONE	PC	SUPPORT FOR OPERATING COSTS	125,500.
Total from continuation sheets				870,876.

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
HOMEWORKS 224 WEEPING CHERRY LANE COLUMBIA, SC 29212	NONE	PC	HOMEOWNERS IN NEED	20,000.
INDIAN WATERS COUNCIL-BOY SCOUTS 715 BETSY DRIVE COLUMBIA, SC 29202	NONE	PC	ORGANIZATIONAL SUPPORT	2,000.
IRMO ARBOR DAY P.O. BOX 5709 W. COLUMBIA, SC 29171	NONE	PC	CONTRIBUTION TOWARDS PURCHASING TREES FOR PUBLIC AREAS IN IRMO	11,820.
JUNIOR ACHIEVEMENT 2711 MIDDLEBURG PLAZA, STE 214 COLUMBIA, SC 29204	NONE	PC	OPERATING COSTS	3,300.
KATRINA'S KIDS 300 HERMAN ST W. COLUMBIA, SC 29169	NONE	PC	FOSTER CARE SUPPORT	1,000.
KEEP THE MIDLANDS BEAUTIFUL 930 RICHLAND STREET COLUMBIA, SC 29201	NONE	PC	CONTRIBUTION TOWARDS OPERATING COSTS	67,995.
LEXINGTON COUNTY SCHOOL DISTRICT TWO 715 9TH ST. COLUMBIA, SC 29169	NONE	GOV	TEACHER OF THE YEAR AWARD	1,000.
LEXINGTON INTERFAITH COMM SERVICES 216 HARMON ST LEXINGTON, SC 29072	NONE	PC	OPERATING FUNDS DONATION	3,600.
MIDLANDS FAMILY PROMISE 2501 HEYWARD ST COLUMBIA, SC 29205	NONE	PC	OPERATING COSTS SUPPORT FOR TRANSITIONA HOUSING FOR THE HOMELESS	5,000.
MIDLANDS HOUSING ALLIANCE 2025 MAIN STREET COLUMBIA, SC 29201	NONE	PC	CONTRIBUTION TOWARDS HOMELESS SERVICES	25,000.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
MUSCULAR DYSTROPHY ASSOCIATION 2700 MIDDLEBURG DR COLUMBIA, SC 29204	NONE	PC	CONTRIBUTION TOWARDS OPERATING COSTS	250.
OLIVER GOSPEL MISSION P.O. BOX 7791 COLUMBIA, SC 29202	NONE	PC	CONTRIBUTION TOWARDS OPERATING COSTS	10,000.
PALMETTO HEALTH CAMP KEMO 1600 MARION STREET COLUMBIA, SC 29201	NONE	PC	SUPPORT TO SEND CHILDREN WITH CANCER TO CAMP	2,000.
PALMETTO PROJECT 4500 FORT JACKSON BLVD COLUMBIA, SC 29209	NONE	PC	CONTRIBUTION FOR CHRISTMAS PRESENTS FOR FAMILIES IN POVERTY	4,800.
PAWMETTO LIFELINE 1275 BOWER PARKWAY COLUMBIA, SC 29212	NONE	PC	CONTRIBUTION FOR OPERATING EXPENSES	2,000.
PROVIDENCE HOME P.O. BOX 3166 COLUMBIA, SC 29230	NONE	PC	CONTRIBUTION TOWARDS OPERATING EXPENSES FOR HOMELESS MEN	10,000.
SAINT MARY'S EPISCOPAL CHURCH 170 ST. ANDREWS ROAD COLUMBIA, SC 29210	NONE	PC	CONTRIBUTION TOWARDS BUILDING FUND FOR CHURCH IN HAITI	7,500.
SC STATE MUSEUM FOUNDATION 301 GERVAIS STRET COLUMBIA, SC 29201	NONE	PC	CONTRIBUTION TOWARDS OPERATING EXPENSES	1,000.
SENIOR RESOURCES 2817 MILLWOOD AVE COLUMBIA, SC 29205	NONE	PC	OPERATING FUNDS FOR MEALS ON WHEELS	1,000.
SHARING GOD'S LOVE P.O. BOX 1021 IRMO, SC 29063	NONE	PC	CONTRIBUTION TOWARDS CRISIS MINISTRY	17,420.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
SISTERCARE P.O. BOX 1029 COLUMBIA, SC 29202	NONE	PC	CONTRIBUTION TOWARDS OPERATING EXPENSES FOR ABUSED AND BATTERED WOMEN AND CHILDREN	5,000.
SOUPER BOWL OF CARING PO BOX 23224 COLUMBIA, SC 29224	NONE	PC	DONATION FOR SPONSOR LUNCHEON	10,000.
THE WOMEN'S SHELTER 3425 MAIN ST. COLUMBIA, SC 29203	NONE	PC	OPERATING COSTS	5,000.
UNITED WAY OF THE MIDLANDS 1800 MAIN STREET COLUMBIA, SC 29201	NONE	PC	CONTRIBUTION TOWARDS OPERATING EXPENSES FOR MEMBER AGENCIES	18,400.
USC EDUCATION FOUNDATION 1600 HAMPTON ST COLUMBIA, SC 29201	NONE	PC	ORGANIZATION SUPPORT	45,000.
WEST COLUMBIA BEAUTIFICATION FOUNDATION PO BOX 4044 WEST COLUMBIA, SC 29171	NONE	PC	SUPPORT FOR PLANTING TREES	1,000.
YMCA OF COLUMBIA 1079 DUTCH FORK RD IRMO, SC 29063	NONE	PC	DONATION FOR BALLENTINE FACILITY	5,000.
AIRPORT HIGH SCHOOL 1315 BOSTON AVE WEST COLUMBIA, SC 29170	NONE	GOV	COMMUNITY BUILDER DONATION	1,000.
AMERICAN LEGION POST 6 1714 LEGION RD CHAPEL HILL, NC 27517	NONE	PC	COMMUNITY BUILDER DONATION	1,000.
BLANKETING FAMILIES 1 MILLHOUSE CIRCLE COLUMBIA, SC 29223	NONE	PC	PROVIDING BLANKETS FOR HOMELESS	1,000.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
BROWNS CHAPEL AME CHURCH 195 BROWNS CHAPEL RD ELLOREE, SC 29047	NONE	PC	COMMUNITY BUILDER DONATION	500.
CAMP TALK PO BOX 2155 WEST COLA, SC 29171	NONE	PC	COMMUNITY BUILDER DONATION	1,000.
COLUMBIA FREE CLINIC 1875 HARADEN ST. COLA, SC 29204	NONE	GOV	OPERATING COSTS	100,000.
COLUMBIA POLICE FOUNDATION 1 JUSTICE SQUARE COLA, SC 29201	NONE	GOV	COMMUNITY BUILDER DONATION	500.
COLUMBIA URBAN LEAGUE 400 BARNWELL ST COLUMBIA, SC 29201	NONE	PC	CHRISTMAS MEALS FOR ELDERLY	5,000.
EDUCATION EQUALS HOPE 102 ACADEMY STREET FORT MILL, SC 29715	NONE	PC	EDUCATION IN HAITI	10,000.
HOMELESS NO MORE 2711 MIDDLEBURG DR COLUMBIA, SC 29204	NONE	PC	COMMUNITY BUILDER DONATION	26,000.
ICRC 5605 BUSH RIVER ROAD COLUMBIA, SC 29212	NONE	PC	ATHLETIC SCHOLARSHIPS FOR THOSE WHO CANNOT PLAY DUE TO COST	10,000.
IRMO ELEMENTARY PTA 7401 GIBBES ST IRMO, SC 29063	NONE	GOV	DONATION	200.
IRMO MIDDLE SCHOOL 6051 WESTCOTT RD COLUMBIA, SC 29212	NONE	GOV	LUNCHESES FOR TEACHERS	1,000.
Total from continuation sheets				

Part XV Supplementary Information**3** Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
JACOBY'S SHIELD PO BOX 5709 W COLA, SC 29171	NONE	PC	DONATION	500.
KOININIA OF COLUMBIA 4427 N MAIN ST COLA, SC 29203	NONE	PC	COMMUNITY BUILDER DONATION	1,000.
LAKE MURRAY PRESBYTERIAN 2721 DUTCH FORK RD CHAPIN, SC 29036	NONE	PC	DONATION FOR PREVENTION OF OPIOD ABUSE	10,000.
LAKE MURRAY-IRMO WOMENS CLUB 1511 LAUREL ST COLUMBIA, SC 29201	NONE	PC	DONATION	250.
LEOS PRIDE FOUNDATION PO BOX 332 BALLENTINE, SC 29002	NONE	PC	COMMUNITY BUILDER DONATION	1,000.
LEUKEMIA AND LYMPHOMA SOCIETY 107 WESTPARK BLVD #150 COLUMBIA, SC 29210	NONE	PC	DONATION	250.
LEXINGTON COUNTY SHERIFF FOUNDATION PO BOX 303 LEXINGTON, SC 29071	NONE	GOV	DONATION	1,000.
LEXINGTON MEDICAL CENTER 2720 SUNSET BOULEVARD W COLA, SC 29169	NONE	PC	CAPITAL CAMPAIGN FOR 3D MAMMOGRAPHY	50,000.
LEXINGTON SCHOOL DISTRICT THREE 715 9TH ST. WEST COLUMBIA, SC 29169	NONE	GOV	SUPPORT TEACHER OF THE YEAR	1,000.
LIVE OAK COUNSELING 600 KING ST COLUMBIA, SC 29205	NONE	PC	DONATION	5,000.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
LOW COUNTRY FOOD BANK 2864 AZALEA DR NORTH CHARLESTON, SC 29405	NONE	PC	FUNDS FOR HURRICANE RELIEF	50,000.
MEDNEED OF SC 121 OAK LN WEST COLUMBIA, SC 29033	NONE	PC	COMMUNITY BUILDER DONATION	1,000.
MENTAL ILLNESS RECOVERY CENTER 3809 ROSEWOOD DR COLUMBIA, SC 29205	NONE	PC	DONATION	1,300.
MISSION LEXINGTON 216 HARMON ST LEXINGTON, SC 29072	NONE	PC	DONATION	26,200.
MUNGO HOMES 441 WESTERN LANE IRMO, SC 29063	NONE	PC	REIMBURSEMENT FOR PURCHASE OF LAP TOP WITH QUICKBOOKS	909.
PALMETTO HEALTH CHILDRENS HOSPITAL 7 RICHLAND MEDICAL PARK DR COLUMBIA, SC 29203	NONE	PC	KEMOPALOOZA	2,000.
RCSD FOUNDATION 5623 TWO NOTCH RD COLUMBIA, SC 29223	NONE	PC	COMMUNITY BUILDER DONATION	500.
RIVERBANKS SOCIETY PO BOX 1060 COLA, SC 29202	NONE	PC	OPERATING COSTS	1,000.
RIVERLAND HILLS BAPTIST CHURCH 201 LAKE MURRAY BLVD IRMO, SC 29063	NONE	PC	COMMUNITY BUILDER FOUNDATION	1,000.
SC TROOPERS ASSOCIATION 4961 BROAD RIVER RD COLUMBIA, SC 29212	NONE	GOV	FUNDS TO HELP FAMILY REPAIR HOME FOR CHILDREN WHOSE MOTHER WAS KILLED IN A DUI	20,000.
Total from continuation sheets				

Part XV Supplementary Information**3** Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
SC FEDERATION FOR THE BLIND 119 S KILBOURNE RD COLUMBIA, SC 29205	NONE	GOV	DONATION	100.
SC FOUNDATION FOR EDUCATION LEADERSHIP 1 FERNANDINA COURT COLUMBIA, SC 29212	NONE	GOV	DONATION	500.
SCOA CARES 166 STONERIDGE DR COLUMBIA, SC 29210	NONE	PC	DONATION	1,000.
ST ANDREWS WOMENS CLUB 1511 LAUREL ST COLUMBIA, SC 29201	NONE	PC	DONATION	1,200.
TOYS FOR TOTS 5405 LEESBURG RD EASTOVER, SC 29045	NONE	PC	COMMUNITY BUILDER DONATION	1,000.
WARRIORS WALK 6439 GARNERS FERRY RD COLUMBIA, SC 29209	NONE	PC	COMMUNITY BUILDER DONATION	1,000.
JDRF WALK 1122 LADY STREET, SUITE 640 COLA, SC 29201	NONE	PC	DONATION	1,500.
Total from continuation sheets				

Michael J. Mungo Foundation
2018 Form 990PF, Schedule B Attachment
Stock Contributions Detail

Steve Mungo

Donor	Date	Security	Quantity	Average High/Low on date of Contribution
Steve Mungo	7/9/2018	Air Lease Crop	500	21,390.00
Steve Mungo	7/9/2018	Apache Corp	750	35,827.50
Steve Mungo	7/9/2018	First Community Corp SC	2500	64,575.00
Steve Mungo	7/9/2018	Trinity Industries Inc	3500	122,990.00
Steve Mungo	7/9/2018	US Bancorp	500	25,490.00
Steve Mungo	12/27/2018	Berkshire Hathaway	500	98,005.00
Steve Mungo	12/27/2018	Caterpillar Inc.	1250	154,762.50
Steve Mungo	12/27/2018	Duke Energy Corporation	870	73,906.50
Steve Mungo	12/27/2018	Johnson & Johnson	3250	407,030.00
Steve Mungo	12/27/2018	Merck & Co. Inc	3000	222,210.00
Steve Mungo	12/27/2018	Motorola Solutions, Inc.	214	23,632.02
Steve Mungo	12/27/2018	Pfizer Inc.	2750	115,665.00
Steve Mungo	12/27/2018	Synovus Financial Corp	12659	392,682.18
Steve Mungo	12/27/2018	Total System Services, Inc.	5523	436,593.15
Steve Mungo	12/27/2018	Trinity Industries Inc	6000	121,680.00
Steve Mungo		Total Contributions		2,316,438.85

Stewart Mungo	7/16/2018	Abbvie Inc.	500	48,020.00
Stewart Mungo	7/16/2018	Apple Inc.	300	57,459.00
Stewart Mungo	7/16/2018	Caterpillar Inc.	125	17,423.75
Stewart Mungo	7/16/2018	Digital Realty Trust Inc.	200	23,088.00
Stewart Mungo	7/16/2018	Fiserv Inc.	300	23,163.00
Stewart Mungo	7/16/2018	Home Depot Inc.	150	29,784.00
Stewart Mungo	7/16/2018	Lam Research Corp.	200	34,368.00
Stewart Mungo	7/16/2018	Visa Inc.	100	13,886.00
Stewart Mungo	7/16/2018	Western Digital Corp	300	23,688.00
Stewart Mungo	12/21/2018	Alphabet Inc. Class A	250	252,357.50
Stewart Mungo	12/21/2018	Amazon.com Inc.	250	355,495.00
Stewart Mungo	12/21/2018	BB&T Corporation	3500	150,482.50
Stewart Mungo	12/21/2018	Caterpillar Inc.	1500	182,475.00
Stewart Mungo	12/21/2018	Cisco Systems, Inc.	5500	234,300.00
Stewart Mungo	12/21/2018	Exelon corporation	4500	208,575.00
Stewart Mungo	12/21/2018	Fiserv Inc.	2700	194,298.75
Stewart Mungo	12/21/2018	General Dynamics Corporation	1000	152,380.00
Stewart Mungo	12/21/2018	Goldman Sachs Group, Inc.	1000	164,525.00
Stewart Mungo	12/21/2018	JP Morgan Chase & Co.	2000	192,115.00
Stewart Mungo	12/21/2018	Lam Research Corp.	1240	160,412.60
Stewart Mungo	12/21/2018	Medtronic Pic	2000	179,550.00
Stewart Mungo	12/21/2018	US Bancorp	3500	158,480.00
Stewart Mungo	12/21/2018	UnitedHealth Group Incorporated	1000	242,475.00
Stewart Mungo	12/21/2018	Walt Disney Company	1500	159,457.50
Stewart Mungo		Total Contributions		3,258,258.60

Combined Total **5,574,697.45**

FORM 990-PF		DIVIDENDS AND INTEREST FROM SECURITIES			STATEMENT	1
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	
MERRILL LYNCH	539,799.	0.	539,799.	539,799.		
TO PART I, LINE 4	539,799.	0.	539,799.	539,799.		

FORM 990-PF		ACCOUNTING FEES			STATEMENT	2
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES		
WEBSTERROGERS LLP	10,375.	0.		10,375.		
TO FORM 990-PF, PG 1, LN 16B	10,375.	0.		10,375.		

FORM 990-PF		OTHER PROFESSIONAL FEES			STATEMENT	3
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES		
BANK FEES	150.	0.		150.		
FRAMING	294.	0.		294.		
TO FORM 990-PF, PG 1, LN 16C	444.	0.		444.		

FORM 990-PF		TAXES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES		
PAYROLL	2,983.	0.		2,983.		
TO FORM 990-PF, PG 1, LN 18	2,983.	0.		2,983.		

FORM 990-PF	OTHER EXPENSES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
CCM INVESTMENT ADVISORS	30,603.	30,603.			0.
INSURANCE OFFICE OF AMERICA	1,357.	0.			1,357.
WIRE FEE	120.	120.			0.
ADVISOR FEES BROKERAGE	83,088.	83,088.			0.
TO FORM 990-PF, PG 1, LN 23	115,168.	113,811.			1,357.

FORM 990-PF	OTHER DECREASES IN NET ASSETS OR FUND BALANCES	STATEMENT	6
DESCRIPTION		AMOUNT	
DIFFERENCE IN FMV AND BOOK BASIS FOR DISPOSED ASSETS		2,279,723.	
TOTAL TO FORM 990-PF, PART III, LINE 5		2,279,723.	

FORM 990-PF	CORPORATE STOCK	STATEMENT	7
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE	
CORPORATE STOCK	20,818,459.	28,038,760.	
TOTAL TO FORM 990-PF, PART II, LINE 10B	20,818,459.	28,038,760.	

FORM 990-PF	CORPORATE BONDS	STATEMENT	8
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE	
CORPORATE BONDS	1,476,598.	1,458,640.	
TOTAL TO FORM 990-PF, PART II, LINE 10C	1,476,598.	1,458,640.	

FORM 990-PF	LIST OF SUBSTANTIAL CONTRIBUTORS PART VII-A, LINE 10	STATEMENT 9
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NAME OF CONTRIBUTOR	ADDRESS
MICHAEL J MUNGO (DECEASED 4/11/2010)	204 ST ANDREWS ROAD COLUMBIA, SC 29210
M. STEWART MUNGO	441 WESTERN LANE IRMO, SC 29063
STEVEN W. MUNGO	441 WESTERN LANE IRMO, SC 29063

FORM 990-PF	PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS	STATEMENT 10
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NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
ROBERT C. CLAWSON 441 WESTERN LANE IRMO, SC 29063	DIRECTOR 0.00	0.	0.	0.
M. STEWART MUNGO 441 WESTERN LANE IRMO, SC 29063	PRESIDENT & DIRECTOR 5.00	0.	0.	0.
STEVEN W. MUNGO 441 WESTERN LANE IRMO, SC 29063	VICE-PRESIDENT & DIRECTOR 0.00	0.	0.	0.
BETH DERIDDER 2033 KENNERLY ROAD IRMO, SC 29063	MANAGER & SEC/TREASURER 25.00	39,000.	0.	0.
MATTHEW MUNGO 441 WESTERN LANE IRMO, SC 29063	DIRECTOR 0.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		39,000.	0.	0.