ويتم			EXTE	NDED TO NOVE	MBE	R 15, 2019	Datum	ı	OMB No 1545-0687
⊸ Form	990-T	· E		nization Bus			ax neturn	F	ONE NO 1343-0007
		Eor col	endar year 2018 or other tax ye	• =	51 360	, and ending		·	2018
		rur ca	•	v.irs.gov/Form990T for in:	struction		tion.	- L	
Depart Interna	ment of the Treasury Il Revenue Service	<b>•</b>		rs on this form as it may			tion is a 501(c)(3).	50	pen to Public Inspection for 01(c)(3) Organizations Only
ΑC	Check box if address changed		Name of organization (	Check box if name cl	hanged a	and see instructions.)			ver identification number yees' trust, see tions )
B Ex	rempt under section	Print	BERGES FAMI	LY FOUNDATIO	NC				7-1426743
	] 501( )( <b>70</b> )	10 20VT	Number, street, and roor 21 MARKER W	n or suite no. If a P.O. box	, see ins	tructions.		E Unrelate (See ins	ed business activity code structions)
	408(e) 220(e)	Туре							
F	408A530(a)		City or town, state or pro VERO BEACH,	vince, country, and ZIP oi	r foreign	postal code		9000	100
C Boo	529(a) ok velue of all assets		F Group exemption num		<b>•</b>			2000	
ate	and of year	13.	G Check organization typ			X 501(c) trust	401(a)	trust	Other trust
H En			tion's unrelated trades or		1	Describe t	he only (or first) un	related	
	de or business here 🕨						complete Parts I-V.		
				us sentence, complete Pa	rts I and	II, complete a Schedule	M for each additiona	al trade d	ır
	siness, then complete			-#1-4-4		bank controlled every 2		Yes	X No
	-		oration a subsidiary in an hifying number of the pare	affiliated group or a paren	it-subsid	iary controlled group?			<b>A</b> 140
			JAMES BERGES			Telepho	ne number 🕨 3	14-4	06-1995
Pa			de or Business Inc			(A) Income	(B) Expenses		(C) Net
1 a	Gross receipts or sale	S							
b	Less returns and allow	vances		c Balance	10	<u></u>			
	Cost of goods sold (S		•		2				!
3	Gross profit. Subtract Capital gain net incon				3 4a	1,049.		<del></del>	1,049.
		•	art II, line 17) (attach Fori	n 4797)	4b	1,0151			
	Capital loss deduction			,	4c	- 101-0-			
5	•		ship or an S corporation (a	ittach statement)	5	279,780.	STMT 1	.1	279,780.
6	Rent income (Schedu	le C)			6				
7	Unrelated debt-finance		, ,		7				
<b>23</b>			nd rents from a controlled on 501(c)(7), (9), or (17) (		9				
22	Exploited exempt acti			nganization (Schedule d)	10		· · · · · · · · · · · · · · · · · · ·		· · · · · · · · · · · · · · · · · · ·
65 11.	Advertising income (S	-			11		DECEL	VEF	
#Ntc (#562929	Other income (See in:	struction	ns; attach schedule)		12		RECE	VL.	<u></u>
	Total. Combine lines	3 throu	gh 12		13	280,829		2010	<b>280,829.</b>
Pa	rt II Deductio	ns No	ot Taken Elsewhe	re (See instructions for the directly connected	r limitat i with th	tions on deductions	NOV 15	2019	8
<u></u>			rectors, and trustees (Sch			ie unrelated basiness		143	<del>-</del> -
C. SANNED	Salaries and wages	iceis, ui	rectors, and trustees (Sch	edule K)			OGDEN	145 <b>U</b>	<del>   </del>
<b>₹</b> 16	Repairs and mainter	ance						16	
<i>U</i> 17	Bad debts							17	
18	Interest (attach sche	dule) (s	ee instructions)					18	
19	Taxes and licenses	(0-		rules) STATEME	י יייזאי	13 SEE STAT	<b>พระม</b> ท 12	19 20	388.
20 21	Depreciation (attach	•	e instructions for limitation	Trules) SIAIEME	2141 .	21	emeni 12	20	
22			n Schedule A and elsewhe	re on return		22a	<del></del>	22b	
23	Depletion					\ <u></u>		23	
24	Contributions to def	erred co	mpensation plans					24	
25	Employee benefit pro	-						25	
26	Excess exempt expe	•	•					26	
27 28	Other deductions (at							27	
28 29	Other deductions (at Total deductions. A							29	388.
30				g loss deduction. Subtrac	t line 29	from line 13		30	280,441.
31				eginning on or after Janua				31	
32			ncome. Subtract line 31 fr			<del></del>		32	280,441.
82370	1 01-09-19 LHA F	r Papei	work Reduction Act Notic	e, see instructions.					Form <b>990-T</b> (2018)

Form 990-	221020 1111111 100111111111111111111111		4/-144	20/43	Fage Z
Part I	II Total Unrelated Business Taxable Income				
33	Total of unrelated business taxable income computed from all unrelated trades or businesses (see	e instructions)		33	280,441.
34	Amounts paid for disallowed fringes			34	
35	Deduction for net operating loss arising in tax years beginning before January 1, 2018 (see instru	ictions)		35	
36	Total of unrelated business taxable income before specific deduction. Subtract line 35 from the su	•			··
30		JIII 01		36	280,441.
	lines 33 and 34			<del> </del>	1,000.
37	Specific deduction (Generally \$1,000, but see line 37 instructions for exceptions)	37	1,000.		
38	Unrelated business taxable income. Subtract line 37 from line 36. If line 37 is greater than line	36,		1	000 444
	enter the smaller of zero or line 36			38	279,441.
Part I	V Tax Computation			, , .	
39	Organizations Taxable as Corporations. Multiply line 38 by 21% (0.21)		<b>&gt;</b>	39	
40	Trusts Taxable at Trust Rates. See instructions for tax computation. Income tax on the amount of	on line 38 from;			
	Tax rate schedule or X Schedule D (Form 1041)		•	40	101,742.
41	Proxy tax. See instructions		•	41	
42	Alternative minimum tax (trusts only)		•	42	
43	Tax on Noncompliant Facility Income. See instructions			43	
44	Total. Add lines 41, 42, and 43 to line 39 or 40, whichever applies			44	101,742.
Part V				44	101,142.
		45.	<del>-</del>		
45 a	Foreign tax credit (corporations attach Form 1118; trusts attach Form 1116)	45a	125	4	
b	Other credits (see instructions) SEE STATEMENT 14	45b	135.	늬	
C	General business credit. Attach Form 3800	45c		<b>⊣</b>	
đ	Credit for prior year minimum tax (attach Form 8801 or 8827)	45d	<del>_</del>	J	
е	Total credits. Add lines 45a through 45d			45e	135.
46	Subtract line 45e from line 44			46_	101,607.
47	Other taxes. Check if from: Form 4255 Form 8611 Form 8697 Form 88	66 Other	(attach schedule)	47	
48	Total tax. Add lines 46 and 47 (see instructions)			48	101,607.
49	2018 net 965 tax liability paid from Form 965-A or Form 965-B, Part II, column (k), line 2			49	0.
	Payments: A 2017 overpayment credited to 2018	50a			
	2018 estimated tax payments	50b		1	
	• •	<del></del>	22,000.	<b>⊣</b>	
	Tax deposited with Form 8868	50c	22,000.	4 1	
	Foreign organizations: Tax paid or withheld at source (see instructions)	50d		-	
	Backup withholding (see instructions)	50e	<del></del>	-	
	Credit for small employer health insurance premiums (attach Form 8941)	50f		4	
g	Other credits, adjustments, and payments: Form 2439				
	Form 4136 Other Total ▶	50g			
51	Total payments. Add lines 50a through 50g			51	22,000.
52	Estimated tax penalty (see instructions). Check if Form 2220 is attached 🕨 🗓			52	4,176.
53	Tax due. If line 51 is less than the total of lines 48, 49, and 52, enter amount owed STAT	rement 1	L5 ▶	53_	<u>83,783.</u>
54	Overpayment. If line 51 is larger than the total of lines 48, 49, and 52, enter amount overpaid		<b>&gt;</b>	54	
55	Enter the amount of line 54 you want: Credited to 2019 estimated tax	Re	funded <b>&gt;</b>	55	
Part \	I Statements Regarding Certain Activities and Other Informatio			·	
56	At any time during the 2018 calendar year, did the organization have an interest in or a signature				Yes No
30	over a financial account (bank, securities, or other) in a foreign country? If "Yes," the organization		-		1,55
	FinCEN Form 114, Report of Foreign Bank and Financial Accounts. If "Yes," enter the name of the	•	•		
	here	ioroign oddiniy			X
					$-\frac{x}{x}$
57	During the tax year, did the organization receive a distribution from, or was it the grantor of, or tra	ansieror to, a ioi	reign trust?		<del> -^-</del> ,
	If "Yes," see instructions for other forms the organization may have to file.				
58	Enter the amount of tax-exempt interest received or accrued during the tax year >\$				<u> </u>
Sian	Under penalties of perjury declare that I have examined this return, including accompanying schedules and sta correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer			eage and belie	er, it is true.
Sign			N	Asy the IRS di	scuss this return with
Here		& TRUS	TEE t	he preparer si	nown below (see
	Signature of officer Date Title		п	nstructions)?	X Yes No
	Print/Type preparer's name Preparer's signature Da	te	Check	if PTIN	<del></del>
Paid			self- employed		
-	MARY KAY KREITLER Mar Kay Kreith	11/13/2019			1311501
Prepa	- DDTGEWAMEDWOUGHGGODDA IID	k	Firm's EIN		-4008324
Use (					
	800 MARKET ST SUITE 1900		1		
	800 MARKET ST, SUITE 1900 Firm's address ► ST. LOUIS, MO 63101		Phone no.	(314)	206-8500

Page 3

Schedule A - Cost of Goods	Sold. Enter	method of inven	tory valuation N/A				<del></del>	
1 Inventory at beginning of year	1	<del></del> .	6 Inventory at end of year			6		
2 Purchases	2		7 Cost of goods sold. S	ubtract I	ine 6			_
3 Cost of labor	3		from line 5. Enter here	and in F	Part I,			
4a Additional section 263A costs		•	line 2		L	7		
(attach schedule)	4a		8 Do the rules of section	1 263A (1	with respect to		Yes	No
b Other costs (attach schedule)	4b		property produced or a	acquired	for resale) apply to			
5 Total. Add lines 1 through 4b	5		the organization?					
Schedule C - Rent Income (	From Real I	Property and	Personal Property L	_ease	d With Real Prope	erty)		
(see instructions)								
1. Description of property								
(1)								
_(2)								
(3)								
		<del> </del>						—
<del></del>		ed or accrued			3(a) Deductions directly of	connected with the ii	ncome in	
(a) From personal property (if the perconent for personal property is more 10% but not more than 50%)	and personal property (if the percenta personal property exceeds 50% or if at is based on profit or income)		columns 2(a) end	d 2(b) (attach schedu	ile) 			
_(1)						. <u></u>		
(2)								
(3)								
(4)			<del> </del>					
Total	0.	Total	<del></del>	0.	0.7.4.1.4.4			
(c) Total income. Add totals of columns there and on page 1, Part I, line 6, column	(A)	<b>&gt;</b>		0.	(b) Total deductions. Enter here and on page 1, Part I, line 6, column (B)	<b>&gt;</b>	. —	0.
Schedule E - Unrelated Deb	t-Financed	Income (see	instructions)					
			2. Gross income from		<ol><li>Deductions directly conn to debt-finance</li></ol>		ole	
1. Description of debt-fin	anced property		or allocable to debt- financed property	(a)	Straight line depreciation (attach schedule)	(b) Other deductions (attach schedule)		
				+				
(2)					<del></del>	+		
(3)	<del>-</del>	<del>-</del>		<del>                                     </del>	<del></del>	<del> </del>		
(4)			_	<b>—</b> —	· <u></u>			
4. Amount of average acquisition debt on or allocable to debt-financed property (attach schedule)	of or a debt-fina	adjusted basis llocable to nced property a schedule)	6. Column 4 divided by column 5		7. Gross income reportable (column 2 x column 6)	8. Allocable (column 6 x to 3(a) as		
(1)			%					_
(2)			%					
(3)			%					
			%					
					nter here and on page 1, Part I, line 7, column (A)	Enter here and Part I, line 7,		
Totals			•		0.			0.
Total dividends-received deductions in	cluded in column	8	<u> </u>					0.
						Form	990-T (2	018)

	İ	Exemp			ntrolled Organizations					
1. Name of controlled organizat	Identi	nployer fication mber		related income a instructions)		al of specified nents made	includ	t of column 4 t ed in the contr ation's gross i	olling	6. Deductions directly connected with income in column 5
(1)										
(2)										
(3)										
(4)										
Nonexempt Controlled Organi	izations									
7. Taxable Income	8. Net unrelated inco (see instruction		9. Total	of specified payr made	nents	10. Part of colu in the controll gros		ızatıon's		ductions directly connecte income in column 10
(1)	-									
(2)				_	_					
(3)										
(4)						-				
3.						Add colur Enter here and line 8,		1, Part I,	Enter h	d columns 6 and 11 ere and on page 1, Part I, line 8, column (B)
lotals .					▶			0.		0
Schedule G - Investme	ent Income of a	Section	501(c)(7	7), (9), or (	17) Ora	anization				
	ructions)	•	1-71-	,, t ,, =- t	, 3					
1. Desc	cription of income			2. Amount of	income	3. Deduction directly connected (attach scheduler)	ected	4. Set-		5. Total deductions and set-asides (col. 3 plus col. 4)
(1)				_			_			
(2)						- <del></del>				
(3)	<del></del>									-
(4)										
(4)	,- <u>-</u> ,			Enter here and o		-				Enter here and on page Part I, line 9, column (E
					lumn (A)	-				Part I, line 9, column (E
Totals	Exempt Activity	/ Incom	► e, Other	Part I, line 9, co	0 •	g Income				Enter here and on page Part I, line 9, column (E
Totals		/ Incom	► e, Other	Part I, line 9, co	0 •	g Income				Part I, line 9, column (E
rotals Schedule I - Exploited		3. Extending the directly with proof of ur	e, Other  xpenses connected roduction related ss income	Part I, line 9, co	o.  rertisin  ne (loss) trade or slumn 2 n 3) If a e cols 5	5. Gross income 5. Gross income activity is not unrelabusiness income.	that ted	6. Exp attribut colur	able to	Part I, line 9, column (E
Schedule I - Exploited (see instruction of exploited activity	2. Gross urrelated business income from	3. Extending the directly with proof of ur	xpenses connected roduction related	Than Adv  4. Net incomfrom urrelated business (cominus colum gain, compute	o.  rertisin  ne (loss) trade or slumn 2 n 3) If a e cols 5	5. Gross income from activity is not unrelated	that ted	attribut	able to	7. Excess exempt expenses (column 6 minus column 5, but not more than
Schedule I - Exploited (see instruction of exploited activity  (1)	2. Gross urrelated business income from	3. Extending the directly with proof of ur	xpenses connected roduction related	Than Adv  4. Net incomfrom urrelated business (cominus colum gain, compute	o.  rertisin  ne (loss) trade or slumn 2 n 3) If a e cols 5	5. Gross income from activity is not unrelated	that ted	attribut	able to	7. Excess exempt expenses (column 6 minus column 5, but not more than
Schedule I - Exploited (see instruction of exploited activity  (1) (2)	2. Gross urrelated business income from	3. Extending the directly with proof of ur	xpenses connected roduction related	Than Adv  4. Net incomfrom urrelated business (cominus colum gain, compute	o.  rertisin  ne (loss) trade or slumn 2 n 3) If a e cols 5	5. Gross income from activity is not unrelated	that ted	attribut	able to	7. Excess exempt expenses (column 6 minus column 5, but not more than
Schedule I - Exploited (see Instru  1. Description of exploited activity  (1) (2) (3)	2. Gross urrelated business income from	3. Extending the directly with proof of ur	xpenses connected roduction related	Than Adv  4. Net incomfrom urrelated business (cominus colum gain, compute	o.  rertisin  ne (loss) trade or slumn 2 n 3) If a e cols 5	5. Gross income from activity is not unrelated	that ted	attribut	able to	7. Excess exempt expenses (column 6 minus column 5, but not more than
Schedule I - Exploited (see instruction of exploited activity  (1) (2)	2. Gross urrelated business income from trade or business  Enter here and on page 1, Part 1, line 10, col (A)	3. Enter h	xpenses connected roduction related ss income  are and on 1, Part 1, 0, col (B)	Than Adv  4. Net incomfrom urrelated business (cominus colum gain, compute	o.  rertisin  ne (loss) trade or slumn 2 n 3) If a e cols 5	5. Gross income from activity is not unrelated	that ted	attribut	able to	7. Excess exempt expenses (column 6 minus column 5, but not more than column 4)  Enter here and on page 1, Part II, line 26
Schedule I - Exploited (see Instruction of exploited activity)  (1) (2) (3) (4)	2. Gross unrelated business income from trade or business  Enter here and on page 1, Part 1, line 10, col (A)	3. Enter h	xpenses connected roduction related ss income  are and on 1, Part I, 0, col (B)	Than Adv  4. Net incomfrom urrelated business (cominus colum gain, compute	o.  rertisin  ne (loss) trade or slumn 2 n 3) If a e cols 5	5. Gross income from activity is not unrelated	that ted	attribut	able to	7. Excess exempt expenses (column 6 minus column 5, but not more than column 4)  Enter here and on page 1,
Totals  Schedule I - Exploited (see Instruction of exploited activity)  (1) (2) (3) (4)  Totals  Schedule J - Advertising	2. Gross urrelated business income from trade or business Enter here and on page 1, Part I, line 10, col (A)  0.  ng Income (see	3. Enter he page line 10	xpenses connected roduction related ss income  ore and on 1, Part I, 1, col (B)	Than Adv  4. Net incomproduce business (cominus colum gain, compute through	lumn (A)  0 .  Vertisin  Ite (loss) Itrade or Itumn 2  n 3) If a e cols 5  7	5. Gross income from activity is not unrelated	that ted	attribut	able to	7. Excess exempt expenses (column 6 minus column 5, but not more than column 4)  Enter here and on page 1, Part II, line 26
1. Description of exploited activity  (1) (2) (3) (4)  Fotals  Schedule J - Advertisii	2. Gross unrelated business income from trade or business  Enter here and on page 1, Part 1, line 10, col (A)	3. Enter he page line 10	xpenses connected roduction related ss income  ore and on 1, Part I, 1, col (B)	Than Adv  4. Net incomproduce business (cominus colum gain, compute through	lumn (A)  0 .  Vertisin  Ite (loss) Itrade or Itumn 2  n 3) If a e cols 5  7	5. Gross income from activity is not unrelated	that ted	attribut	able to	7. Excess exempt expenses (column 6 minus column 5, but not more than column 4)  Enter here and on page 1, Part II, line 26
Totals  Schedule I - Exploited (see Instruction of exploited activity)  (1) (2) (3) (4)  Totals  Schedule J - Advertising	2. Gross urrelated business income from trade or business Enter here and on page 1, Part I, line 10, col (A)  0.  ng Income (see	3. Ender the page line 10 ported o	ere end on 1, Part I, 1, col (B)	4. Net incomfrom urrelated business (cominus colum gain, comput through	lumn (A)  0.  /ertisin  ne (loss) I trade or Jumn 2 n 3) If a socis 5 7  Basis  using gain all and company and all and company and all	5. Gross incommendations of the second secon	tion that	attribut	able to	7. Excess exempt expenses (column 6 minus column 5, but not more than column 4)  Enter here and on page 1, Part II, line 26
Schedule I - Exploited (see Instruction of exploited activity)  (1) (2) (3) (4)  Fotals  Schedule J - Advertisin  Part I Income From  1. Name of periodical (1)	Enter here and on page 1, Part I, line 10, col (A)  Periodicals Rep  2. Gross advertising advertising advertising	3. Ender the page line 10 ported o	ore and on 1, Part I, 1, col (B)  O .  O .  O .  O .  Direct	4. Net incomfrom unveilated business (cominus colum gain, compute through	lumn (A)  0.  /ertisin  ne (loss) I trade or Jumn 2 n 3) If a socis 5 7  Basis  using gain all and company and all and company and all	5. Gross incommendations of the second secon	tion that	attribut colur	able to	7. Excess exempt expenses (column 6 minus column 5, but not more than column 4)  Enter here and on page 1, Part II, line 26  7. Excess readership costs (column 6 minus column 7 minus
Schedule I - Exploited (see Instruction of exploited activity)  (1) (2) (3) (4)  Fotals Schedule J - Advertisin Part I Income From  1. Name of periodical (1) (2)	Enter here and on page 1, Part I, line 10, col (A)  Periodicals Rep  2. Gross advertising advertising advertising	3. Ender the page line 10 ported o	ore and on 1, Part I, 1, col (B)  O .  O .  O .  O .  Direct	4. Net incomfrom unveilated business (cominus colum gain, compute through	lumn (A)  0.  /ertisin  ne (loss) I trade or Jumn 2 n 3) If a socis 5 7  Basis  using gain all and company and all and company and all	5. Gross incommendations of the second secon	tion that	attribut colur	able to	7. Excess exempt expenses (column 6 minus column 5, but not more than column 4)  Enter here and on page 1, Part II, line 26  7. Excess readership costs (column 6 minus column 7 minus
Totals Schedule I - Exploited (see Instruction of exploited activity)  (1) (2) (3) (4)  Totals Schedule J - Advertisin Part I Income From  1. Name of periodical (1) (2) (3)	Enter here and on page 1, Part I, line 10, col (A)  Periodicals Rep  2. Gross advertising advertising advertising	3. Ender the page line 10 ported o	ore and on 1, Part I, 1, col (B)  O .  O .  O .  O .  Direct	4. Net incomfrom unveilated business (cominus colum gain, compute through	lumn (A)  0.  /ertisin  ne (loss) I trade or Jumn 2 n 3) If a socis 5 7  Basis  using gain all and company and all and company and all	5. Gross incommendations of the second secon	tion that	attribut colur	able to	7. Excess exempt expenses (column 6 minus column 5, but not more than column 4)  Enter here and on page 1, Part II, line 26  7. Excess readership costs (column 6 minus column 7 minus
Schedule I - Exploited (see Instruction of exploited activity)  (1) (2) (3) (4)  Fotals Schedule J - Advertisin Part I Income From  1. Name of periodical (1) (2)	Enter here and on page 1, Part I, line 10, col (A)  Periodicals Rep  2. Gross advertising advertising advertising	3. Ender the page line 10 ported o	ore and on 1, Part I, 1, col (B)  O .  O .  O .  O .  Direct	4. Net incomfrom unveilated business (cominus colum gain, compute through	lumn (A)  0.  /ertisin  ne (loss) I trade or Jumn 2 n 3) If a socis 5 7  Basis  using gain all and company and all and company and all	5. Gross incommendations of the second secon	tion that	attribut colur	able to	7. Excess exempt expenses (column 6 minus column 5, but not more than column 4)  Enter here and on page 1, Part II, line 26  7. Excess readership costs (column 6 minus column 7 minus
Totals Schedule I - Exploited (see Instruction of exploited activity)  (1) (2) (3) (4)  Totals Schedule J - Advertisin Part I Income From  1. Name of periodical (1) (2) (3)	Enter here and on page 1, Part I, line 10, col (A)  Periodicals Rep  2. Gross advertising advertising advertising	3. Ender the page line 10 ported o	ore and on 1, Part I, 1, col (B)  O .  O .  O .  O .  Direct	Than Adv  4. Net incomfrom urrelated business (cominus colum gain, compute through  5 olidated  4. Advertor (loss) (col. 3) If a gircols 5 th	lumn (A)  0.  /ertisin  ne (loss) I trade or Jumn 2 n 3) If a socis 5 7  Basis  using gain all and company and all and company and all	5. Gross incommendations of the second secon	tion that	attribut colur	able to	7. Excess exempt expenses (column 6 minus column 5, but not more than column 4)  Enter here and on page 1, Part II, line 26  7. Excess readership costs (column 6 minus column 7 minus

Form 990-T (2018) BERGES FAMILY FOUNDATION 47-14267

Part II Income From Periodicals Reported on a Separate Basis (For each periodical listed in Part II, fill in columns 2 through 7 on a line-by-line basis ) 7. Excess readership costs (column 6 minus column 5, but not more than column 4) 4. Advertising gain or (loss) (col. 2 minus col. 3) If a gain, compute cols. 5 through 7 3. Direct 5. Circulation 6. Readership advertising 1. Name of periodical income costs (1) (2) (3) (4) 0. 0. 0. Totals from Part I ▶ Enter here and on page 1, Part I, line 11, col (A) Enter here and on Enter here and page 1, Part I, line 11, col (B) on page 1, Part II, line 27 0. Totals, Part II (lines 1-5) 0. Schedule K - Compensation of Officers, Directors, and Trustees (see instructions)

1. Name	2. Title	3. Percent of time devoted to business	4. Compensation attributable to unrelated business
(1)		%	
2)		%	
3)		%	
4)		%	
otal. Enter here and on page 1, Part II, line 14		<b>•</b>	

Form 990-T (2018)

## SCHEDULE D (Form 1041)

Department of the Treasury Internal Revenue Service

Name of estate or trust

**Capital Gains and Losses** 

➤ Attach to Form 1041, Form 5227, or Form 990-T.

▶ Use Form 8949 to list your transactions for lines 1b, 2, 3, 8b, 9 and 10.

► Go to www.irs.gov/F1041 for instructions and the latest information.

OMB No. 1545-0092

**2018** 

Employer identification number

47-1426743 BERGES FAMILY FOUNDATION Note: Form 5227 filers need to complete only Parts I and II. Short-Term Capital Gains and Losses-Generally Assets Held One Year or Less (See instructions) See instructions for how to figure the amounts to enter on the lines below. (e) (h) Gain or (loss) (d) Adjustments Subtract column (e) Proceeds Cost from column (d) and to gain or loss from (sales price) (or other basis) combine the result This form may be easier to complete if you round off cents to whole dollars. Form(s) 8949, Part I, with column (g) line 2, column (g) 1 a Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b 1 b Totals for all transactions reported on Form(s) 8949 with Box A checked Totals for all transactions reported on Form(s) 8949 with Box B checked Totals for all transactions reported on Form(s) 8949 with Box C checked Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824 SEE STATEMENT 18 826. Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts 5 Short-term capital loss carryover. Enter the amount, if any, from line 9 of the 2017 Capital Loss Carryover Worksheet 6 Net short-term capital gain or (loss). Combine lines 1a through 6 in column (h). Enter here and on line 17, 826. column (3) on page 2 Part II | Long-Term Capital Gains and Losses-Generally Assets Held More Than One Year (See instructions) See instructions for how to figure the amounts to enter on the lines below. (d) (e) (h) Gain or (loss) Adjustments Subtract column (e) Proceeds Cost to gain or loss from from column (d) and (sales price) (or other basis) This form may be easier to complete if you round off cents to whole dollars. combine the result form(s) 8949, Part II, with column (g) line 2, column (g) 8 a Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b 8 b Totals for all transactions reported on Form(s) 8949 with Box D checked Totals for all transactions reported on Form(s) 8949 with Box E checked Totals for all transactions reported on Form(s) 8949 with Box F checked Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824 11 11 12 Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts 12 13 Capital gain distributions 13 14 Gain from Form 4797, Part I 223. 14 15 Long-term capital loss carryover. Enter the amount, if any, from line 14 of the 2017 Capital Loss Carryover Worksheet Net long-term capital gain or (loss). Combine lines 8a through 15 in column (h). Enter here and on line 18a, 16 column (3) on page 2

Schedule D (Form 1041) 2018

810841 12-21-18 LHA For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

Caviller. Board The instructions before completing this paid.  Caviller. Board The instructions before completing this paid.  17. Net short-term gain or (less).  18. Net short-term gain or (less).  19. Total and the instructions before completing this paid.  19. Total and gain or (less).  19. Unrecaptured section 1250 gain (see line 18 of the worksheet).  20. See See See See See See See See See Se	Schedule D (Form 1041) 2018 BERGES FAMILY	FOU	NDATION				47-	1426	743 Page 2
17					(1) Beneficiaries'	(2)	Estate's	s	
18 Net florit-ferm gain or (less): 1 Total to rejact 1 Total ret gain or (less). Combine lines 17 and 18a  1 Total ret gain or (less). Combine lines 17 and 18a  1 Total ret gain or (less). Combine lines 17 and 18a  1 Total ret gain or (less). Combine lines 17 and 18a  1 Total ret gain or (less). Combine lines 17 and 18a  1 Total ret gain or (less). Combine lines 17 and 18a  1 Total ret gain or (less). Combine lines 17 and 18a  1 Total ret gain or (less). Combine lines 17 and 18a  1 Total ret gain or (less). Combine lines 17 and 18a  1 Total ret gain or (less). Combine lines 17 and 18a  1 Total ret gain or (less). Combine lines 17 and 18a  1 Total ret gain or (less). Combine lines 17 and 18a  1 Total ret gain or (less). Combine lines 17 and 18a  1 Total ret gain or (less). Combine lines 17 and 18a  1 Total ret gain or (less). Combine lines 17 and 18a  1 Total ret gain or (less). Combine lines 17 and 18a  1 Total ret gain or (less). Combine lines 18a and 18a ret loss, complete the 4a, if lines 18a and 19a ret gain, or (less or lines 19a). In the 2 column (3), is a net loss, complete the 19a return or (less or lines). In the 2 column (3), is a net loss, complete the 19a return or (less). In the 2 column (3), is a net loss, complete the 19a return or (less). In the 2 column (3), is a net loss, complete the 19a return or (less). In the 2 column (2), is a loss, complete the 2 softed the 2 softed 19a return (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 22c, or and form 1041, lines 22c, is more than zero, or 2 conference the part of the 2 column or 1041, lines 22c, is more than zero.  1 Editer tabels in the part of the 2 column (2) are return 2 complete the 3 column 2 column (2) are gains, or qualified dividences are included in income in Part I of Form 990-T, line 39, so more than 2 column (2) are return 2 column (2) are return 19a re	Caution: Read the instructions before con	npleting	this part.			or			
a Fold for year  b Unrecaptured section 1250 gain (see line 18 of the worksheet)  c 28% rate gain  10 Unrecaptured section 1250 gain (see line 18 of the worksheet)  c 28% rate gain  10 Unrecaptured section 1250 gain (see line 18 of the worksheet)  c 28% rate gain  10 Unrecaptured section 1250 gain (see line 18 of the worksheet)  c 28% rate gain  10 Unrecaptured section 1250 gain (see line 18 of the worksheet)  c 28% rate gain  10 Unrecaptured section 1250 gain (see line 18 of the worksheet)  c 28% rate gain or (fess). Combine lines 17 and 18a  10 Unrecaptured section 1250 gain (see line 18 of the worksheet)  10 Unrecaptured section 1250 gain (see line 18 of the worksheet)  10 Unrecaptured section 1250 gain (see line 18 of the worksheet)  10 Unrecaptured section 1250 gain (see line 18 of the worksheet)  10 Unrecaptured section 1250 gain (see line 18 of the worksheet)  10 Unrecaptured section 1250 gain (see line 18 of the worksheet)  10 Unrecaptured section 1250 gain (see line 18 of the worksheet)  10 Unrecaptured section 1250 gain (see line 18 of the worksheet)  10 Unrecaptured section 1250 gain (see line 18 of the worksheet)  10 Unrecaptured section 1250 gain (see line 18 of the worksheet)  11 Unrecaptured section 1250 gain (see line 18 of the worksheet)  12 Unrecaptured section 1250 gain (see line 18 of the worksheet)  12 Unrecaptured section 1250 gain (see line 18 of the worksheet)  12 Unrecaptured section 1250 gain (see line 18 of the worksheet)  12 Unrecaptured section 1250 gain (see line 18 of the worksheet)  12 Unrecaptured section 1250 gain (see line 18 of the worksheet)  13 Unrecaptured section 1250 gain (see line 18 of the worksheet)  14 Unrecaptured section 1250 gain (see line 18 of the worksheet)  15 Unrecaptured section 1250 gain (see line 18 of the worksheet)  15 Unrecaptured section 1250 gain (see line 18 of the worksheet)  15 Unrecaptured section 1250 gain (see line 18 of the worksheet)  15 Unrecaptured section 1250 gain (see line 18 of the worksheet)  15 Unrecaptured section 1250 gain (see line	17 Net short-term gain or (loss)			17			<u> </u>	26.	<u> </u>
b Unrecaptured section 1250 gain (see line 18 of the worksheet) 2 67% rate gain 19 Total net gain or (less). Combine lines 17 and 18a 19 Total net gain or (less). Combine lines 17 and 18a 100 to Part V and rad 20 complete Part IV If the 19, column (3), as a net gain, enter the gain on Form 1041, line 4 (or Form 990-T, Part I, line 4a). If lines 18a and 19, column (3), are net gain. go to Part V and rate the sal (18a for 19a fo	18 Net long-term gain or (loss):								
2 Part   1   1   1   1   1   1   1   1   1	a Total for year			18a			22	23.	223.
19 Total set gain or (test). Combine lines 17 and 18a    Molet. If line 19, column (8), is a net gain, enter the gain on Form 1041, line 4 (or Form 990-T, Part I, line 4a) If lines 18a and 19, column (2), are net gain, enter the gain on Form 1041, line 4 (or Form 990-T, Part I, line 4a) If lines 18a and 19, column (2), are net gain, enter the gain of the 10 form 1041, line 4 (or Form 990-T, Part I, line 4a) If a trissi), the smaller of the 19, column (3) or b \$3,000  Note: If the loss on enter as a (toss) on Form 1041, line 4 (or Form 990-T, Part I, line 4a) If a trissi), the smaller of the 19, column (3) or b \$3,000  Note: If the loss on line 19, column (3) or b \$3,000  Note: If the loss on line 19, column (3) or b \$3,000  Note: If the loss on line 19, column (3) or b \$3,000  Note: If the loss on line 19, column (3), is more than \$3,000, or if Form 1041, lange 1, line 22 (or Form 990-T, line 38), is a loss, complete the Capital Loss Carpover Werksheet in the instructions of form 1041 line 20, line 20, line 18a, col (2) is more than 200.  The Tart V Tarx Computation Using Maximum Capital Gains Rates  Form 1841 filers, Complete this part only if both lines 18a and 19 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 20, line 18a, col (2) is more than 200.  2	<b>b</b> Unrecaptured section 1250 gain (see line 18 of the work	(sheet)		<u>1</u> 8b			_		
Most: // Imper 19, column (3), is a net gam, enter the gam on Form 1041, line 4 (or Form 990-T, Part I, line 4a) // If need 18 and 18, column (2), are net gams, go to Part V, and den't Capital Loss Climitation	c 28% rate gain		ł	18c					
go (b Part V, and don't complete Part IV If the 19, column (9), is a net loss, complete Part IV and the Capital Loss Carryover Worksheet, as necessary Part IV Expital Loss Carryover Worksheet, as necessary Part IV Expital Loss Carryover Worksheet in the instructions to figure your capital cost carryover Worksheet in the instructions to figure your capital loss carryover Worksheet in the instructions to figure your capital loss carryover Worksheet in the instructions to figure your capital loss carryover Worksheet in the instructions to figure your capital loss carryover Worksheet in the instructions to figure your capital loss carryover Worksheet in the instructions to figure your capital loss carryover Worksheet in the instructions to figure your capital loss carryover Worksheet in the instructions to figure your capital loss carryover Worksheet in the instructions to figure your capital loss carryover Worksheet in the instructions to figure your capital loss carryover Worksheet in the instructions to figure your capital loss carryover Worksheet in the instructions to figure your capital loss carryover Worksheet in the instructions to figure your capital loss carryover Worksheet in the instructions to figure your capital loss carryover Worksheet in the instructions to figure your properties the san entry on Form 1041, line 20 (i) or line 18, col (2) is more than zero.  2	19 Total net gain or (loss). Combine lines 17 and 18a		▶	19	<u> </u>		1,04	49.	<u> </u>
Part IV	Note: If line 19, column (3), is a net gain, enter the gain of	on Forn	n 1041, line 4 (or Form 9	90-T,	Part I, line 4a) If line:	s 18a an	d 19, c	olumn (	2), are net gains,
A The loss on fine 19, column (3)   er   b \$3,000		mn (3),	is a net loss, complete P	art IV	and the Capital Loss	Carryove	r Works	heet, a	s necessary
A The loss on fine 19, column (3)   er   b \$3,000	20 Enter here and enter as a (loss) on Form 1041, line 4 (or	r Form 9	990-T. Part I, line 4c, if a tru	ist), th	e smaller of:				
Less Carryover Worksheet in the instructions to figure your capital loss carryover			, , ,				20	(	)
Part V   Tax Computation Using Maximum Capital Gains Rates	Note: If the loss on line 19, column (3), is more than \$3, Loss Carryover Worksheet in the instructions to figure yo	000, <b>or</b>	ıf Form 1041, page 1, lin	e 22 (	or Form 990-T, line 3	88), is a l	oss, co	mplete	the Capital
Form 1041 filers. Complete this part entry if both lines 18a and 19 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 20(2), and Form 1041, line 20(2), and Form 1041, line 20(2) for line 18a, col. (2) is more than zero.  Subtrain 1041, line 20(2) or line 18a, col. (2) is more than zero.  Form 990-T trusts. Complete this part entry if both lines 18a and 19 are gains, or qualified dividends are included in income in Part I of Form 990-T, and Form 990-T, line 38), is more than zero. Supplies this part and complete the Schedule D Tax Worksheet in the instructions if either line 18b, col. (2) or line 18c, col. (2) is more than zero.  Form 990-T trusts. Complete this part entry if both lines 18a and 19 are gains, or qualified dividends are included in income in Part I of Form 990-T, and Form 990-T, line 38), is more than zero. Supplies this part entry if both lines 18a and 19 are gains, or qualified dividends are included in income in Part I of Form 990-T, and Form 990-T, line 38).  I effect this smaller of the in 18a or 19 in column (2) but not less than zero.  I enter the estate's or trust's qualified dividends from Form 1041, line 20(2) (or enter the qualified dividends included in income in Part I of Form 990-T, and Form 990-T, line 38).  I effect the smaller of the amount on line 27 or line 28 and 2 and 23 and 2 and 23 and 2 and 23 and 2 an									
Caution: Skp this part and complete the Schedule D Tax Worksheet in the instructions of					nt is entered in Part I o	r Part II a	nd there	e is an er	ntry on Form 1041
Caution: Skip this part and complete the Schedule D Tax Worksheet in the instructions of   Either line 18b, col. (2) or line 18c, col. (2) is more than zero, or  80th Form 1041, line 20(1), and Form 4952, line 4g are more than zero.   21 Enter travable income from Form 1041, line 22 (2 for Form 990-T, line 38), is more than zero.   22 Enter the smaller of line 18a or 19 in column (2) but not less than zero   23 Enter the smaller of line 18a or 19 in column (2) but not less than zero   24 Add lines 22 and 23   25 Effect the smaller of the mount from 90-T)   26 Subtract line 25 from line 24. If zero or less, enter -0-  27 Subtract line 25 from line 21. If zero or less, enter -0-  28 Enter the smaller of the amount on line 2 or 52,600   29 Enter the smaller of the amount on line 2 or 52,600   29 Enter the smaller of the amount on line 2 or 52,600   29 Enter the smaller of the amount on line 20 or 52,600   29 Enter the smaller of the amount on line 20 or 52,600   29 Enter the smaller of the amount on line 20 or 52,600   20 Enter the smaller of the amount on line 20 or 52,600   20 Enter the smaller of the amount on line 20 or 52,600   21 Enter the smaller of line 20 or line 28   22 2 2 2 3 .  23 Enter the smaller of line 20 or line 28   24 2 2 3 .  25 Subtract line 25 from line 28. If zero or less, enter -0-  26 Subtract line 30 from line 21 or line 28   27 2 79 218 .  28 1 2 2 3 .  29 2 2 2 5 .  20 3 .  20 4 2 2 3 .  21 2 2 3 .  22 3 .  22 3 .  23 5 Enter the smaller of line 20 or line 28   24 2 2 3 .  25 Subtract line 25 from line 28   26 2 2 2 3 .  27 2 79 218 .  28 1 2 2 3 .  29 2 2 2 3 .  20 4 2 2 3 .  20 4 2 2 3 .  21 2 2 3 .  22 3 .  23 5 Subtract line 25 from line 28   24 2 2 3 .  25 5 Subtract line 30 from line 26   26 3 1 2 2 3 .  27 2 79 218 .  28 1 2 2 3 .  29 2 2 2 5 .  20 3 .  20 4 2 2 3 .  20 4 2 2 3 .  20 5 .  20 6 7 2 79 218 .  20 7 2 79 218 .  20 8 2 2 2 2 3 .  20 9 2 2 2 2 3 .  20 9 2 2 2 2 3 .  20 9 2 2 2 2 3 .  20 9 2 2 2 2 3 .  20 9 2 2 2 2 3 .  20 9 2 2 2 2 3 .  20 9 2 2 2 2 3 .  20 9 2 2 2 2			oorannii (a) ano game, en am					- 10 411 01	,
<ul> <li>Either Inne 18b, col (2) or time 18c, col (2) is more than zero, or</li> <li>Both Form 1041, Inne 2b(1), and Form 4952, line 4g are more than zero</li> <li>Form 990-T trusts. Complete time 18a part only if both lines 18a and 19 are gains, or qualified dividends are included in income in Part I of Form 990-T, and Form 990-T, line 38, is more than zero. Step this part and complete the Sehedule D Tax Worksheet in the instructions if either line 18b, col. (2) or line 18c, col. (2) is more than zero.</li> <li>Enter trabel income from Form 1041, line 20 (or Form 990-T, line 38)</li> <li>Enter trusts else income from Form 1041, line 20 (or Form 990-T, line 38)</li> <li>Enter trusts state 2 or trusts qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T)</li> <li>Enter trusts state 3 or trusts qualified dividends included in income in Part I of Form 990-T, line 38)</li> <li>Enter the state or trust is filing Form 4952, enter the amount from line 4g; otherwise, enter -0-</li> <li>Subtract line 25 from line 24, if zero or less, enter -0-</li> <li>Subtract line 25 from line 24, if zero or less, enter -0-</li> <li>Enter the smaller of the amount on line 27 or line 28</li> <li>Subtract line 29 from line 28.</li> <li>Enter the smaller of the amount on line 27 or line 28</li> <li>Enter the smaller of line 2 or line 26.</li> <li>Enter the smaller of line 20 in line 26.</li> <li>Enter the smaller of line 20 in line 26.</li> <li>Enter the smaller of line 21 or 182,700</li> <li>Add lines 27 and 30</li> <li>Enter the smaller of line 21 or 182,700</li> <li>Add lines 27 and 30</li> <li>Add lines 27 and 30</li> <li>Add lines 27 and 30</li> <li>Subtract line 34 from line 31. If zero or less, enter -0-</li> <li>Enter the smaller of line 32 or line 35.</li> <li>Multiply line 36 by 15% (0.15)</li> <li>Add lines 30 and 36</li> <li>Subtract line 39 from l</li></ul>		Worksh	eet in the instructions if						
<ul> <li>Both Form 1041, Inne 2b(1), and Form 4952, line 4g are more than zero Form 990-T trusts. Complete this part only if both lines 18a and 19 are gains, or qualified dividends are included in income in Part I of Form 990-T, and Form 990-T, line 38; is more than zero. Skip this part and complete the Schedule D Tax Worksheet in the instructions if either line 18b, col. (2) or line 18c, col. (2) is more than zero.</li> <li>Effet traxable income from Form 1041, line 22 (or Form 990-T, line 38)</li> <li>Effet trustable income from Form 1041, line 22 (or Form 990-T, line 38)</li> <li>Effet the smaller of line 18a or 19 in column (2)</li> <li>Effet the smaller of line 18a or 19 in column (2)</li> <li>Effet the smaller of trust is filing form 4952, enter the amount from line 4g; otherwise, enter -0-</li> <li>Subtract line 25 from line 21.1 it zero or less, enter -0-</li> <li>Effet the smaller of the amount on line 27 or line 28</li> <li>Subtract line 25 from line 21.1 it zero or less, enter -0-</li> <li>Effet the smaller of line 21 or line 28</li> <li>Subtract line 29 from line 28.1 it zero or less, enter -0-</li> <li>Effet the smaller of line 21 or line 26</li> <li>Subtract line 30 from line 28.3</li> <li>Effet the smaller of line 21 or line 26</li> <li>Subtract line 30 from line 28.3</li> <li>Effet the smaller of line 21 or line 26</li> <li>Subtract line 30 from line 30.1 if zero or less, enter -0-</li> <li>Effet the smaller of line 21 or line 25</li> <li>Add lines 27 and 30</li> <li>Effet the smaller of line 21 or line 25</li> <li>Effet the smaller of line 21 or line 25</li> <li>Effet the smaller of line 21 or line 25</li> <li>Effet the smaller of line 21 or line 25</li> <li>Effet the smaller of line 21 or line 25</li> <li>Effet the smaller of line 21 or line 25</li> <li>Effet the smaller of line 21 or line 25</li> <li>Effet the smaller of line 21 or line 25</li> <li>Effet the smaller of line 21 or l</li></ul>									•
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38, is more than zero. Skip this part and complete the Schedule D Tax Werksheet in the instructions if either line 18b, col. (2) or line 18c, col. (2) is more than zero.    1				nds are	e included in income in	Part I of	Form 99	90-T. an	d Form 990-T, line
21   Enter taxable income from Form 1041, line 22 (or Form 990-T, line 38)									
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but not less than zero  25 Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T)  24 Add lines 22 and 23  25 If the estate or trust is filing Form 4952, enter the amount from line 4g, otherwise, enter -0-  26 Subtract line 25 from line 24, If zero or less, enter -0-  27 Subtract line 26 from line 21, If zero or less, enter -0-  28 Enter the smaller of the amount on line 21 or S2,600  29 Enter the smaller of the amount on line 27 or line 28  30 Subtract line 29 from line 28. If zero or less, enter -0-  27 Subtract line 29 from line 28. If zero or less, enter -0-  28 Enter the smaller of line 21 or line 26  30 Subtract line 29 from line 28. If zero or less, enter -0-  31 Enter the smaller of line 21 or line 26  32 Subtract line 30 from line 26  33 1 223.  34 279, 218.  35 Enter the smaller of line 21 or line 26  36 Subtract line 30 from line 31. If zero or less, enter -0-  36 Enter the smaller of line 22 or line 35  37 Multiply line 36 by 15% (0.15)  38 Enter the smaller of line 32 or line 35  39 Add lines 30 and 36  40 Subtract line 39 from line 31. If zero or less, enter -0-  40 223.  41 45.  45 Multiply line 40 by 20% (0.20)  41 101, 697.  43 Add lines 37, 41, and 42  44 101, 780.  45 Tax on all taxable income. Enter the smaller of line 43 or line 44 here and on Form 1041, Schedule 6, line 1a (or Form 990-T, line 40)  45 Tax on all taxable income. Enter the smaller of line 43 or line 44 here and on Form 1041, Schedule 6, line 1a (or Form 990-T, line 40)	•	,	,				1 /		
23 Enter the estate's or trust's qualified dividends from Form 1041, line 26(2) (or enter the qualified dividends included in income in Part I of Form 990-T)  24 Add lines 22 and 23  25 If the estate or trust is filing Form 4952, enter the amount from line 4g, otherwise, enter -0-  26 Subtract line 25 from line 24, if zero or less, enter -0-  27 Subtract line 26 from line 21. If zero or less, enter -0-  28 Enter the smaller of the amount on line 21 or \$2,600  29 Enter the smaller of the amount on line 27 or line 28  30 Subtract line 29 from line 28. If zero or less, enter -0-  31 Enter the smaller of line 21 or line 26  32 Subtract line 29 from line 28. If zero or less, enter -0-  33 Enter the smaller of line 21 or \$12,700  34 Add lines 27 and 30  35 Enter the smaller of line 32 or line 35  36 Enter the smaller of line 32 or line 35  37 Multiply line 36 by 15% (0.15)  38 Enter the amount from line 31  39 Add lines 30 and 36  30 Subtract line 39 from line 38. If zero or less, enter -0-  41 Multiply line 40 by 20% (0.20)  42 Figure the tax on the amount on line 27. Use the 2018 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)  42 101, 780.  43 Add lines 37, 41, and 42  44 Figure the tax on the amount on line 21. Use the 2018 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)  45 Tax on all trabable income. Enter the smaller of line 43 or line 44 here and on Form 1041, Schedule  6, line 1a (or Form 990-T, (ine 40)	, .	22	223						_
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43 101,742.  44 Figure the tax on the amount on line 21. Use the 2018 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)  45 Tax on all taxable income. Enter the smaller of line 43 or line 44 here and on Form 1041, Schedule G, line 1a (or Form 990-T, line 40)  45 101,742.	42 Figure the tax on the amount on line 27. Use the 2018 Ta	x Rate S	Schedule for Estates	ĺ	1		ĺĺ		
Figure the tax on the amount on line 21. Use the 2018 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)  44 101,780.  45 Tax on all taxable income. Enter the smaller of line 43 or line 44 here and on Form 1041, Schedule G, line 1a (or Form 990-T, line 40)  45 101,742.	•	ctions fo	r Form 1041)	42					
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45 Tax on all taxable income. Enter the smaller of line 43 or line 44 here and on Form 1041, Schedule  G, line 1a (or Form 990-T, line 40)  45  101,742.					100	<b>-</b>			
G, line 1a (or Form 990-T, line 40)	·		•	. —		780.			
		or line 4	4 here and on Form 1041, S	Schedu	ile				104 515
810942 12 21 10 Schadula D (Form 1041) 2019	G, line 1a (or Form 990-T, line 40)			_	·				

FORM 990-T INCOME	(LOSS) FROM PARTNERSHIPS	STATEMENT 11
DESCRIPTION		NET INCOME OR (LOSS)
FLOW THROUGH - ORDINARY BUSINES	SS INCOME (LOSS)	279,780.
TOTAL INCLUDED ON FORM 990-T, 1	PAGE 1, LINE 5	279,780.
FORM 990-T	CONTRIBUTIONS	STATEMENT 12
DESCRIPTION/KIND OF PROPERTY	METHOD USED TO DETERMINE FMV	AMOUNT
CD&R ASSOCIATES X WATERWORKS	N/A	388.
TOTAL TO FORM 990-T, PAGE 1, L:	INE 20	388.

FORM 990-T	CONTRIBUTIONS SUMMARY		STATEMENT	13
CARRYOVER OF PRIOF	R YEARS UNUSED CONTRIBUTIONS			
FOR TAX YEAR 201 FOR TAX YEAR 201 FOR TAX YEAR 201 FOR TAX YEAR 201 FOR TAX YEAR 201	4 5 6			
TOTAL CARRYOVER TOTAL CURRENT YEAR	R 50% CONTRIBUTIONS	388		
TOTAL CONTRIBUTION TAXABLE INCOME LIM	NS AVAILABLE MITATION AS ADJUSTED	388 139,915	_	
EXCESS 50% CONTRIB		0	_	
ALLOWABLE CONTRIBU	TIONS DEDUCTION		_	888
TOTAL CONTRIBUTION	N DEDUCTION		3	388

FORM 990-T	OTHER CREDITS	STATEMENT 14
DESCRIPTION		AMOUNT
EMPLOYER CREDIT F	FOR PAID FAMILY AND MEDICAL LEAVE	135.
TOTAL TO FORM 990	O-T, PAGE 2, PART V, LINE 45B	135.
FORM 990-T	INTEREST AND PENALTIES	STATEMENT 15
TAX FROM FORM 99 UNDERPAYMENT F LATE PAYMENT F	PENALTY INTEREST	79,607. 4,176. 2,135. 2,388.

	LATE	rerest	REST STATEMENT				
DESCRIPTION	DATE	AMOUNT	BALANCE	RATE	DAYS	INTEREST	
TAX DUE	05/15/19	101,607.	101,607.	.0600			
EXTENSION PAYMENT	05/15/19	-22,000.	79,607.	.0600	46	604.	
INTEREST RATE CHANGE	06/30/19	0.	80,211.	.0500	138	1,531.	
DATE FILED	11/15/19		81,742.				
FORM 990-T	LATE	PAYMENT PEN	ALTY		STA	TEMENT 17	
FORM 990-T DESCRIPTION	LATE	PAYMENT PEN	ALTY BALANCE	MOI	STA'	TEMENT 17	
	<del></del>	AMOUNT 79,60	BALANCE	7.			

## SCHEDULE I (Form 1041)

Department of the Treasury

Name of estate or trust

**Alternative Minimum Tax - Estates and Trusts** 

Attach to Form 1041.

► Go to www.irs.gov/Form1041 for instructions and the latest information.

OMB No 1545-0092

2018

Employer identification number

1 Adjusted to 2 Interest 3 Taxes 4 Reserved 5 Refund of 6 Depletion 7 Net opera 8 Interest fr 9 Qualified s 10 Exercise of 11 Other esta 12 Electing la 13 Dispositio 14 Depreciati	(difference between regular tax and AMT) ting loss deduction. Enter as a positive amount om specified private activity bonds exempt from the regular tax small business stock (see instructions) of incentive stock options (excess of AMT income over regular tax stes and trusts (amount from Schedule K-1 (Form 1041), box 1 tirge partnerships (amount from Schedule K-1 (Form 1065-B), if n of property (difference between AMT and regular tax gain or	x tax income) 12, code A) box 6) loss) regular tax and AMT)	ome		1 2 3 4 5 6 7 8 9 10 11	280,441.				
2 Interest 3 Taxes 4 Reserved 5 Refund of 6 Depletion 7 Net opera 8 Interest fr 9 Qualified s 10 Exercise of 11 Other esta 12 Electing la 13 Dispositio 14 Depreciate	for future use taxes (difference between regular tax and AMT) ting loss deduction. Enter as a positive amount om specified private activity bonds exempt from the regular tax small business stock (see instructions) of incentive stock options (excess of AMT income over regular tax sites and trusts (amount from Schedule K-1 (Form 1041), box 1 tirge partnerships (amount from Schedule K-1 (Form 1065-B), if in of property (difference between AMT and regular tax gain or on on assets placed in service after 1986 (difference between in ctivities (difference between AMT and regular tax income or los ations (difference between AMT and regular tax income or los	tax income) 12, code A) box 6) loss) regular tax and AMT) ss)			2 3 4 5 6 7 8 9 10	280,441.				
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4 Reserved 5 Refund of 6 Depletion 7 Net opera 8 Interest fr 9 Qualified s 10 Exercise o 11 Other esta 12 Electing la 13 Dispositio 14 Depreciate	taxes (difference between regular tax and AMT) ting loss deduction. Enter as a positive amount om specified private activity bonds exempt from the regular tax small business stock (see instructions) of incentive stock options (excess of AMT income over regular tax sites and trusts (amount from Schedule K-1 (Form 1041), box 1 sirge partnerships (amount from Schedule K-1 (Form 1065-B), if on of property (difference between AMT and regular tax gain or on on assets placed in service after 1986 (difference between in ctivities (difference between AMT and regular tax income or loss ations (difference between AMT and regular tax income or loss	tax income) 12, code A) box 6) loss) regular tax and AMT) ss)			4					
5 Refund of 6 Depletion 7 Net opera 8 Interest fr 9 Qualified s 10 Exercise of 11 Other esta 12 Electing la 13 Dispositio 14 Depreciate	taxes (difference between regular tax and AMT) ting loss deduction. Enter as a positive amount om specified private activity bonds exempt from the regular tax small business stock (see instructions) of incentive stock options (excess of AMT income over regular tax sites and trusts (amount from Schedule K-1 (Form 1041), box 1 sirge partnerships (amount from Schedule K-1 (Form 1065-B), if on of property (difference between AMT and regular tax gain or on on assets placed in service after 1986 (difference between in ctivities (difference between AMT and regular tax income or loss ations (difference between AMT and regular tax income or loss	tax income) 12, code A) box 6) loss) regular tax and AMT) ss)			5 ( 6 7 8 9 10 11					
6 Depletion 7 Net opera 8 Interest fr 9 Qualified s 10 Exercise o 11 Other esta 12 Electing la 13 Dispositio 14 Depreciati	(difference between regular tax and AMT) ting loss deduction. Enter as a positive amount om specified private activity bonds exempt from the regular tax small business stock (see instructions) of incentive stock options (excess of AMT income over regular tax stes and trusts (amount from Schedule K-1 (Form 1041), box 1 singe partnerships (amount from Schedule K-1 (Form 1065-B), in of property (difference between AMT and regular tax gain or on on assets placed in service after 1986 (difference between in ctivities (difference between AMT and regular tax income or loss ations (difference between AMT and regular tax income or loss	tax income) 12, code A) box 6) loss) regular tax and AMT) ss)			6 7 8 9 10					
7 Net opera 8 Interest fr 9 Qualified s 10 Exercise of 11 Other esta 12 Electing la 13 Dispositio 14 Depreciate	ting loss deduction. Enter as a positive amount om specified private activity bonds exempt from the regular tax small business stock (see instructions) of incentive stock options (excess of AMT income over regular sizes and trusts (amount from Schedule K-1 (Form 1041), box 1 arge partnerships (amount from Schedule K-1 (Form 1065-B), in of property (difference between AMT and regular tax gain or on on assets placed in service after 1986 (difference between retrivities (difference between AMT and regular tax income or loss ations (difference between AMT and regular tax income or loss	tax income) 12, code A) box 6) loss) regular tax and AMT) ss)			7 8 9 10					
9 Qualified s 10 Exercise of 11 Other esta 12 Electing la 13 Dispositio 14 Depreciati	om specified private activity bonds exempt from the regular tag small business stock (see instructions) of incentive stock options (excess of AMT income over regular sites and trusts (amount from Schedule K-1 (Form 1041), box 1 arge partnerships (amount from Schedule K-1 (Form 1065-B), i in of property (difference between AMT and regular tax gain or on on assets placed in service after 1986 (difference between in citivities (difference between AMT and regular tax income or loss ations (difference between AMT and regular tax income or loss	tax income) 12, code A) box 6) loss) regular tax and AMT) ss)			8 9 10					
9 Qualified s 10 Exercise of 11 Other esta 12 Electing la 13 Dispositio 14 Depreciate	small business stock (see instructions)  If incentive stock options (excess of AMT income over regular interestive stock options (excess of AMT income over regular interestive stock options (excess of AMT income over regular interesting state and trusts (amount from Schedule K-1 (Form 1045-B), in of property (difference between AMT and regular tax gain or on on assets placed in service after 1986 (difference between interesting states) (difference between AMT and regular tax income or loss ations (difference between AMT and regular tax income or loss)	tax income) 12, code A) box 6) loss) regular tax and AMT) ss)			9 10 11					
10 Exercise of 11 Other esta 12 Electing la 13 Dispositio 14 Depreciati	of incentive stock options (excess of AMT income over regular to tites and trusts (amount from Schedule K-1 (Form 1041), box 1 large partnerships (amount from Schedule K-1 (Form 1065-B), i in of property (difference between AMT and regular tax gain or ion on assets placed in service after 1986 (difference between in citivities (difference between AMT and regular tax income or loss ations (difference between AMT and regular tax income or loss	12, code A) box 6) loss) regular tax and AMT) ss)			10					
11 Other esta 12 Electing la 13 Dispositio 14 Depreciati	ites and trusts (amount from Schedule K-1 (Form 1041), box 1 irge partnerships (amount from Schedule K-1 (Form 1065-B), in of property (difference between AMT and regular tax gain or ion on assets placed in service after 1986 (difference between retrivities (difference between AMT and regular tax income or loss ations (difference between AMT and regular tax income or loss).	12, code A) box 6) loss) regular tax and AMT) ss)			11					
<ul><li>12 Electing la</li><li>13 Dispositio</li><li>14 Depreciati</li></ul>	irge partnerships (amount from Schedule K-1 (Form 1065-B), i n of property (difference between AMT and regular tax gain or on on assets placed in service after 1986 (difference between r ctivities (difference between AMT and regular tax income or los ations (difference between AMT and regular tax income or loss	box 6) loss) regular tax and AMT) ss)								
13 Disposition 14 Depreciation	n of property (difference between AMT and regular tax gain or on on assets placed in service after 1986 (difference between r ctivities (difference between AMT and regular tax income or los ations (difference between AMT and regular tax income or loss	loss) regular tax and AMT) ss)			12					
14 Depreciati	on on assets placed in service after 1986 (difference between r ctivities (difference between AMT and regular tax income or los ations (difference between AMT and regular tax income or loss	regular tax and AMT) ss)				-26.				
•	ctivities (difference between AMT and regular tax income or los ations (difference between AMT and regular tax income or loss	ss)								
15 Passive at	ations (difference between AMT and regular tax income or loss	•	4 Depreciation on assets placed in service after 1986 (difference between regular tax and AMT)							
	•				15					
16 Loss limit	n costs (difference between regular tax and AMT)	s)			16					
17 Circulation	,				17	- <u>-</u>				
18 Long-term	n contracts (difference between AMT and regular tax income)				18					
	sts (difference between regular tax and AMT)				19	5,018.				
20 Research	and experimental costs (difference between regular tax and AN	NT)			20					
21 Income fr	om certain installment sales before January 1, 1987				21 (					
22 Intangible	drilling costs preference				22					
•	istments, including income-based related adjustments				23					
	e tax net operating loss deduction (See the instructions for the				24 (_					
•	alternative minimum taxable income. Combine lines 1 through	24			25	285,433.				
	nplete Part II below before going to line 26.	a= /a	1	ı						
	stribution deduction from Part II, line 44	N/A	26							
	deduction (from Form 1041, line 19)	N/A	27							
28 Add lines					28	205 422				
	r trust's share of alternative minimum taxable income. Subtrac	t line 28 from line 25			29	285,433.				
If line 29		<del>-</del>								
	00 or less, stop here and enter -0- on Form 1041, Schedule G, I	line 1c. The estate or trust	ISN'T HAD	le for the						
******	ative minimum tax.									
	24,600, but less than \$180,300, go to line 45.	- h 50								
	300 or more, enter the amount from line 29 on line 51 and go to come Distribution Deduction on a Minimu		· <del></del>	N/A						
	alternative minimum taxable income (see instructions)	III Tax Dasis		N/ A	30					
-	tax-exempt interest (other than amounts included on line 8)				31					
•	gain from Schedule D (Form 1041), line 19, column (1). If a los	e antar -0-			32					
	ins for the tax year allocated to corpus and paid or permañently	•			J2					
	purposes (from Form 1041, Schedule A, line 4)	y 361 aside 101			33					
	ins paid or permanently set aside for charitable purposes from	arnes income (see instru	ctions)		34					
	ins computed on a minimum tax basis included on line 25	gross moonie (see man a	0110113)		35 (					
	sses computed on a minimum tax basis included on line 25. En	iter as a positive amount			36					
•	ble net alternative minimum taxable income (DNAMTI). Combin	•	zero or le	ss. enter -0-	37					
	quired to be distributed currently (from Form 1041, Schedule l			,	38					
	punts paid, credited, or otherwise required to be distributed (fro		B. line 10	)	39					
40 Total distr			,	,	40	<u> </u>				

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41

Schedule I (Form 1041) (2018)

41 Tax-exempt income included on line 40 (other than amounts included on line 8)

42 Tentative income distribution deduction on a minimum tax basis. Subtract line 41 from line 40 LHA For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

Sche	dule I (Form 1041) (2018) BERGES FAMILY FOUNDATION		_	47-	1426743 F	Page 2
		(conti	nued)	N/A		
43	Tentative income distribution deduction on a minimum tax basis. Subtract line 31 from line 3					
	If zero or less, enter -0-			43		
44	Income distribution deduction on a minimum tax basis. Enter the smaller of line 42 or line	43.				
	Enter here and on line 26			44		
Pa	rt III   Alternative Minimum Tax					
45	Exemption amount	,	,	45	\$24,600 00	
46	Enter the amount from line 29	46		1		
47	Phase-out of exemption amount	47	\$81,900 <u>00</u>	1		
48	Subtract line 47 from line 46. If zero or less, enter -0-	48	<u> </u>	<u> </u>		
49	Multiply line 48 by 25% (0.25)			49		
50	Subtract line 49 from line 45. If zero or less, enter -0-			50		
51	Subtract line 50 from line 46			51	285,43	<u>33.</u>
52	Go to Part IV of Schedule I to figure line 52 if the estate or trust has qualified dividends or ha	-				
	of column (2) of Schedule D (Form 1041) (as refigured for the AMT, if necessary). Otherwis	se, if line	e 51 is -			
	• \$191,100 or less, multiply line 51 by 26% (0.26).				E.C. 0.	^^
	<ul> <li>Over \$191,100, multiply line 51 by 28% (0.28) and subtract \$3,822 from the result</li> </ul>			52	<u>7</u> 6,08	82.
53	Alternative minimum foreign tax credit (see instructions)			53	76.04	
	Tentative minimum tax. Subtract line 53 from line 52			54	76,01	
55	Enter the tax from Form 1041, Schedule G, line 1a (minus any foreign tax credit from Sched			55	101,7	44.
56	Alternative minimum tax. Subtract line 55 from line 54. If zero or less, enter -0 Enter here	e and or	1			^
īp.	Form 1041, Schedule G, line 1c		<del></del>	56	<del></del>	0.
IPO	rt IV   Line 52 Computation Using Maximum Capital Gains Rate					
	Caution: If you didn't complete Part V of Schedule D (Form 1041), the Schedule D Tax Work or the Qualified Dividends Tax Worksheet in the Instructions for Form 1041, see the instructions					
	before completing this part.	IUIIS				
57	Enter the amount from line 51			57	285,43	33.
58	Enter the amount from Schedule D (Form 1041), line 26, line 13 of the Schedule D Tax	1	1	<del>"</del>	203,4	<del>55•</del>
70	Worksheet, or line 4 of the Qualified Dividends Tax Worksheet in the Instructions for					
	Form 1041, whichever applies (as refigured for the AMT, if necessary)	58	223.			
59	Enter the amount from Schedule D (Form 1041), line 18b, column (2)	"		1		
<b>VO</b>	(as refigured for the AMT, if necessary). If you didn't complete					
	Schedule D for the regular tax or the AMT, enter -0-	59			•	
60	If you didn't complete a Schedule D Tax Worksheet for the regular tax or the			1		
	AMT, enter the amount from line 58. Otherwise, add lines 58 and 59 and enter	1				
	the smaller of that result or the amount from line 10 of the Schedule D Tax					
	Worksheet (as refigured for the AMT, if necessary)	60	223.			
61	Enter the smaller of line 57 or line 60		<u> </u>	61	2:	23.
62	Subtract line 61 from line 57			62	285,2	
63	If line 62 is \$191,100 or less, multiply line 62 by 26% (0.26). Otherwise, multiply line 62 by					
	28% (0.28) and subtract \$3,822 from the result			63	76,03	<u>37.</u>
64	Maximum amount subject to the 0% rate	64	\$2,600 00	] [		
65	Enter the amount from line 27 of Schedule D (Form 1041), line 14 of the Schedule D					
	Tax Worksheet, or line 5 of the Qualified Dividends Tax Worksheet in the Instructions					
	for Form 1041, whichever applies (as figured for the regular tax). If you didn't			[		
	complete Schedule D or either worksheet for the regular tax, enter the amount					
	from Form 1041, line 22; if zero or less, enter -0-	65	279,218.			
66	Subtract line 65 from line 64. If zero or less, enter -0-	66	0.			
67	Enter the smaller of line 57 or line 58	67	223.			
68	Enter the smaller of line 66 or line 67. This amount is taxed at 0%	68_	000	{		
69	Subtract line 68 from line 67	69	223.	<u> </u>	aut. Len.	(0045)
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Schedule I (Form 1041) (2018)

76,082.

76,099.

76,082.

82

83

82 Multiply line 81 by 25% (0.25)

and subtract \$3,822 from the result

85 Enter the smaller of line 83 or line 84 here and on line 52

84 If line 57 is \$191,100 or less, multiply line 57 by 26% (0.26). Otherwise, multiply line 57 by 28% (0.28)

83 Add lines 63, 76, 79, and 82

SCHEDULE D	NET SHORT-TERM GAIN OR LOSS FROM PARTNERSHIPS AND S-CORPORATIONS	STATEMENT 18	
DESCRIPTION OF ACTIVITY		GAIN OR LOSS	
FLOW THROUGH		826.	
TOTAL TO SCHEDULE D, PART I, LINE 5		826.	