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Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

▶ Go to www.irs.gov/Form990PF for instructions and the latest information.

OMB No 1545-0052

2018

Open to Public Inspection

For calendar year 2018 or tax year beginning , 2018, and ending , 20

Name of foundation: The Kathryn Ames Foundation, Inc.

A Employer identification number: 52-1828472

Number and street (or P O box number if mail is not delivered to street address): 305 West Chesapeake Avenue — Room/suite: Suite 308

B Telephone number (see instructions): (410)821-3006

City or town, state or province, country, and ZIP or foreign postal code: Towson MD 21204

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 (from Part II, col. (c), line 16) ▶ $ 9,030,215.

J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) (Part I, column (d) must be on cash basis.)

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

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)

		(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 (attach schedule)				
2	Check ▶ ☒ if the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments	160.	160.		
4	Dividends and interest from securities	200,065.	200,065.		
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	441,098.			
b	Gross sales price for all assets on line 6a 683,873.				
7	Capital gain net income (from Part IV, line 2)		441,098.		
8	Net short-term capital gain				
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less: Cost of goods sold				
c	Gross profit or (loss) (attach schedule)				
11	Other income (attach schedule)				
12	**Total.** Add lines 1 through 11	641,323.	641,323.		
Operating and Administrative Expenses 13	Compensation of officers, directors, trustees, etc.	25,500.			25,500.
14	Other employee salaries and wages	20,657.			20,657.
15	Pension plans, employee benefits				
16a	Legal fees (attach schedule)				
b	Accounting fees (attach schedule)				
c	Other professional fees (attach schedule) L-16c Stmt	35,000.	35,000.		
17	Interest				
18	Taxes (attach schedule) (see instructions) See Stmt	8,073.	2,394.		
19	Depreciation (attach schedule) and depletion				
20	Occupancy				
21	Travel, conferences, and meetings	10,386.			10,386.
22	Printing and publications				
23	Other expenses (attach schedule) See Stmt	2,483.	684.		1,799.
24	**Total operating and administrative expenses.** Add lines 13 through 23	102,099.	38,078.		58,342.
25	Contributions, gifts, grants paid	430,906.			430,906.
26	**Total expenses and disbursements.** Add lines 24 and 25	533,005.	38,078.		489,248.
27	Subtract line 26 from line 12				
a	**Excess of revenue over expenses and disbursements**	108,318.			
b	**Net investment income** (if negative, enter -0-)		603,245.		
c	**Adjusted net income** (if negative, enter -0-)				

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Part II	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)	Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing			
	2 Savings and temporary cash investments	261,220.	407,488.	407,488.
	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 (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶			
	Less. allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	10,148.	8,469.	8,469.
	10a Investments—U.S. and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule) Schedule 1	3,792,630.	3,756,359.	8,389,258.
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment. basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule) Schedule 2	196,500.	196,500.	225,000.
	14 Land, buildings, and equipment: basis ▶			
	Less· accumulated depreciation (attach schedule) ▶			
	15 Other assets (describe ▶)			
	16 **Total assets** (to be completed by all filers—see the instructions. Also, see page 1, item I)	4,260,498.	4,368,816.	9,030,215.
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 (attach schedule)			
	22 Other liabilities (describe ▶)			
	23 **Total liabilities** (add lines 17 through 22)			
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			
	28 Paid-in or capital surplus, or land, bldg., and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds	4,260,498.	4,368,816.	
	30 **Total net assets or fund balances** (see instructions)	4,260,498.	4,368,816.	
	31 **Total liabilities and net assets/fund balances** (see instructions)	4,260,498.	4,368,816.	

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	4,260,498.
2 Enter amount from Part I, line 27a	2	108,318.
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	4,368,816.
5 Decreases not included in line 2 (itemize) ▶	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	4,368,816.

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	See Schedule 3	P		
b				
c				
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))
a				441,098.
b				
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				441,098.
b				
c				
d				
e				

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7; If (loss), enter -0- in Part I, line 7 }	2	441,098.
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6). If gain, also enter in Part I, line 8, column (c). See instructions. If (loss), enter -0- in Part I, line 8	3	

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	497,376.	9,180,733.	0.054176
2016	392,489.	8,355,525.	0.046974
2015	441,364.	8,581,361.	0.051433
2014	550,211.	8,606,591.	0.063929
2013	743,636.	8,037,691.	0.092519

2	**Total** of line 1, column (d)	2	0.309031
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years	3	0.061806
4	Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	9,591,601.
5	Multiply line 4 by line 3	5	592,818.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	6,032.
7	Add lines 5 and 6	7	598,850.
8	Enter qualifying distributions from Part XII, line 4	8	489,248.

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

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

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	12,065.
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	12,065.
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	12,065.
6	Credits/Payments:		
a	2018 estimated tax payments and 2017 overpayment credited to 2018 — 6a 8,469.		
b	Exempt foreign organizations—tax withheld at source — 6b		
c	Tax paid with application for extension of time to file (Form 8868) — 6c 3,641.		
d	Backup withholding erroneously withheld — 6d		
7	Total credits and payments. Add lines 6a through 6d	7	12,110.
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	45.
11	Enter the amount of line 10 to be: **Credited to 2019 estimated tax** ▶ 45. **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?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition	1b		X
	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.			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation. ▶ $ ________ **(2)** On foundation managers. ▶ $ ________			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ ________			
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.	2		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	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by *General Instruction T.*	5		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?	6	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	7	X	
8a	Enter the states to which the foundation reports or with which it is registered. See instructions. ▶ MD			
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	8b	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	9		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

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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	11		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	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
	Website address ▶ www.kathrynames.org			
14	The books are in care of ▶ Pierson & Pierson Telephone no. ▶ (410)821-3004			
	Located at ▶ 305 West Chesapeake Avenue, Suite 308 Towson, MD ZIP+4 ▶ 21204			
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 ▶ 15			
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?	16		X
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ▶			

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	1b		X
	Organizations relying on a current notice regarding disaster assistance, check here ▶ ☐			
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?	1c		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 ▶ 20___ , 20___ , 20___ , 20___			
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.)	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ 20___ , 20___ , 20___ , 20___			
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.)	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
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?	4b		X

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

			Yes	No
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	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? ☐ 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?	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. See instructions.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
W. Michel Pierson 2210 Chilham Rd., Baltimore, MD 21209	President 1.00	0.	0.	0.
Robert L. Pierson 305 W.Chesapeake Ave., Towson, MD 21204	Sec./Treas. 10.00	50,000.	0.	0.
Esther Saltzman 725 Mt. Wilson Lane, Apt. 800 Baltimore MD 21208	Vice-Pres. 3.00	7,500.	0.	0.
See Statement	3.00	-32,000.	0.	0.

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

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

Total number of other employees paid over $50,000 ▶ 0

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

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

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
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	0.
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 N/A	0.
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3 ▶	0.

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	9,538,284.
b	Average of monthly cash balances	1b	199,382.
c	Fair market value of all other assets (see instructions)	1c	
d	**Total** (add lines 1a, b, and c)	1d	9,737,666.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) — 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	9,737,666.
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	146,065.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	9,591,601.
6	**Minimum investment return.** Enter 5% of line 5	6	479,580.

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	479,580.
2a	Tax on investment income for 2018 from Part VI, line 5	2a	12,065.		
b	Income tax for 2018. (This does not include the tax from Part VI.)	2b			
c	Add lines 2a and 2b			2c	12,065.
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	467,515.
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	467,515.
6	Deduction from distributable amount (see instructions)			6	
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1			7	467,515.

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	489,248.
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	489,248.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions	5	0.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	489,248.

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

Part XIII Undistributed Income (see instructions)

		(a) Corpus	(b) Years prior to 2017	(c) 2017	(d) 2018
1	Distributable amount for 2018 from Part XI, line 7				467,515.
2	Undistributed income, if any, as of the end of 2018:				
a	Enter amount for 2017 only				
b	Total for prior years: 20 ___ , 20 ___ , 20 ___				
3	Excess distributions carryover, if any, to 2018:				
a	From 2013 . . . . . . 345,627.				
b	From 2014 . . . . . . 130,635.				
c	From 2015 . . . . . . 16,758.				
d	From 2016 . . . . . . 0.				
e	From 2017 . . . . . . 28,827.				
f	**Total** of lines 3a through e	521,847.			
4	Qualifying distributions for 2018 from Part XII, line 4: ▶ $ 489,248.				
a	Applied to 2017, but not more than line 2a				
b	Applied to undistributed income of prior years (Election required—see instructions)				
c	Treated as distributions out of corpus (Election required—see instructions)				
d	Applied to 2018 distributable amount				467,515.
e	Remaining amount distributed out of corpus	21,733.			
5	Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6	**Enter the net total of each column as indicated below:**				
a	Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	543,580.			
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				
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 instructions			0.	
f	Undistributed income for 2018. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2019				0.
7	Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required—see instructions)				
8	Excess distributions carryover from 2013 not applied on line 5 or line 7 (see instructions)	345,627.			
9	**Excess distributions carryover to 2019.** Subtract lines 7 and 8 from line 6a	197,953.			
10	Analysis of line 9:				
a	Excess from 2014 . . . . 130,635.				
b	Excess from 2015 . . . . 16,758.				
c	Excess from 2016 . . . . 0.				
d	Excess from 2017 . . . . 28,827.				
e	Excess from 2018 . . . . 21,733.				

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2018, enter the date of the ruling ▶

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

	Tax year (a) 2018	Prior 3 years (b) 2017	(c) 2016	(d) 2015	(e) Total
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test—enter: (1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test—enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 Information Regarding Foundation Managers:

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

NONE

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

NONE

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

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

a The name, address, and telephone number or email address of the person to whom applications should be addressed:

See Supplementary Information Statement

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

c Any submission deadlines:

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

Part XV Supplementary Information *(continued)*

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient: Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
None to Individuals,all to 501(c)(3)Public Charities See Schedule 5				430,906.
Total . . . ▶ 3a				430,906.
b *Approved for future payment*				
Total . . . ▶ 3b				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	160.	
4 Dividends and interest from securities			14	200,065.	
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			18	441,098.	
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)				641,323.	

13 **Total.** Add line 12, columns (b), (d), and (e) . . . 13 641,323.

(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) (See instructions)

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

			Yes	No
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	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

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.

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

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship

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 — Date 11-15-19 — Title Secretary/Treasurer

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

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
Robert L. Pierson		11-15-19		P01492838

Firm's name ▶ Pierson & Pierson — Firm's EIN ▶ 52-1854606

Firm's address ▶ 305 WEST CHESAPEAKE AVENUE SUITE 308 TOWSON MD 21204 — Phone no (410)821-3004

Form 990-PF: Return of Private Foundation

Part XV, Line 2: Supplementary Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc. — Continuation Statement

Name and Address Information	Form Information	Submission Information	Restrictions
W. Michel Pierson, President 305 West Chesapeake Avenue, Suite 308 Towson, MD 21204 410-821-3006	See attached Schedule 4	See attached Schedule 4	See attached Schedule 4

Form 990-PF: Return of Private Foundation

Part VIII: Information about Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors — Continuation Statement

Name and address	Title, and average hours per week devoted to position	Compensation	Contributions to employee benefit plans and deferred compensation	Expense account, other allowances
Julia S. Pierson 4107 Roland Avenue Baltimore, MD 21211	Vice-Pres. 3.00	3,000.	0.	0.
A Less: Reported on Part 1 - Line 16		-35,000.		
		-32,000.	0.	0.

Additional information from your Form 990-PF: Return of Private Foundation

Form 990-PF: Return of Private Foundation

Taxes

Continuation Statement

Description	Revenue and Expense per Book	Net Investment Income	Adjusted Net Income	Disbursement for charitable purpose
Excise Tax	5,679.			
Foreign Tax	2,394.	2,394.		
Total	8,073.	2,394.		

Form 990-PF: Return of Private Foundation

Other Expenses

Continuation Statement

Description	Revenue and Expense per Book	Net Investment Income	Adjusted Net Income	Disbursement for charitable purpose
Bank charges	24.	24.		
Certified mail	3.	3.		
International mail	34.			34.
Long distance to Israel	382.			382.
Federal Express	295.			295.
Meeting expenses	21.	10.		11.
Subscriptions	1,525.	448.		1,077.
Software	116.	116.		
Agent custody fee	83.	83.		
Total	2,483.	684.		1,799.

Legal and Professional Fees

Name	Employer Identification No
The Kathryn Ames Foundation, Inc.	52-1828472

Line 16a - Legal Fees

Name of Provider	Type of Service Provided	Amount Paid Per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Total to Form 990-PF, Part I, Line 16a					

Line 16b - Accounting Fees

Name of Provider	Type of Service Provided	Amount Paid Per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Total to Form 990-PF, Part I, Line 16b					

Line 16c - Other Professional Fees

Name of Provider	Type of Service Provided	Amount Paid Per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
	Investment Management Fees	35,000.	35,000.		
Total to Form 990-PF, Part I, Line 16c		35,000.	35,000.		

Kathryn Ames Foundation, Inc. | **I.D. #52-1828472** | **12/31/2018**
Form 990-PF | **Schedule 1**
Part II, Line 10b

CORPORATE STOCKS

DATE PURCH.	NO. SHS.	TYPE OF PROP.	COST BASIS	CUR. VAL. PER SH.	TOTAL CUR. VAL.
9-20-96	1,738	American Express	22,845 60	95.32	165,666.16
10-09-04	900	Amgen	59,395.58	194 67	175,203 00
07-08-99	718	AT&T	31,254 06	28 54	20,491.72
7-27-95	1,800	Avery Dennison Corp	36,900.00	89.83	161,694.00
12-17-96	1	Berkshire Hathaway	33,100 00	306,000 00	306,000.00
5-3-00	750	Bristol Myers Squibb Co	37,372 00	51.98	38,985.00
7-22-99	4,050	CSX	34,849 41	62.13	251,626 50
1-4-96	2,000	Carnival Corp - Cl 'A'	24,125 00	49 30	98,600 00
09-18-18	500	Catepillar Inc	74,898.94	127 07	63,535 00
04-04-06	1,000	Check Point Software Tech	20,286 95	102 65	102,650.00
11-25-97	200	Chemours Co	3,124 10	28.22	5,644.00
3-31-97	4,050	Cisco Systems	25,396 88	43 33	175,486.50
9-27-96	400	Citigroup	73,474.39	52.06	20,824 00
11-9-93	2,000	Coca Cola Company	20,750 00	47 35	94,700.00
1-28-97	1,500	Disney	35,243 97	109.65	164,475 00
11-25-97	1,282	DowDupont	58,313 40	53 48	68,561 36
6-29-10	750	Elbit Systems Ltd	38,782 20	114 02	85,515 00
11-9-93	2,000	Emerson Electric Co	28,593 75	59 75	119,500 00
11-3-93	1,000	Exxon Mobil	16,126 75	68.19	68,190 00
11-16-10	1,000	Welltower Inc	43,813.40	69.41	69,410 00
04-04-06	1,000	Hershey Company	52,996 43	107.18	107,180 00
3-26-97	1,000	Home Depot	12,805 00	171 82	171,820 00
1-15-04	2,000	Intel	54,505 31	46.93	93,860 00
1-15-04	1,820	J.P. Morgan Chase	67,471 88	97.62	177,668.40
04-04-06	1,000	Johnson & Johnson	59,878 90	129 05	129,050.00
10-17-97	1,000	Lennar Corp 'A'	8,191 69	39 15	39,150 00
10-17-97	20	Lennar Corp Cl B	135 48	31 33	626.60
1-15-04	1,000	Eli Lilly & Co.	69,532 45	115.72	115,720 00
9-20-96	1,000	McDonalds	23,271 50	177.57	177,570.00
1-4-94	2,306	Merck & Co	19,889.25	76 41	176,201.46
1-15-04	1,000	Microsoft Corp	27,916 91	101.57	101,570 00
6-29-10	1,500	Nice Systems Ltd.	38,953.29	108.21	162,315 00
6-6-97	3,054	Nike Corp - Cl 'B'	18,678 93	74 14	226,423.56
01-25-18	210	Nvidia Corp	50,155 08	133 50	28,035 00
11-16-10	1,500	Omega Healthcare REIT	26,825 40	35 15	52,725 00
9-20-96	1,800	Pepsico	48,336.16	110 48	198,864.00
6-9-95	5,400	Pfizer	45,562 50	43 65	235,710.00
10-16-96	1,800	Procter & Gamble	31,846.50	91 92	165,456.00
11-29-18	1,100	Pulte Group Inc	29,775 97	25 99	28,589.00
04-04-06	400	Qualcomm Inc	20,036 01	56 91	22,764 00
1-9-12	1,100	Schlumberger Ltd.	76,175 05	36 08	39,688 00
8-5-10	1,000	The Southern Company	35,954 45	43.92	43,920 00
1-15-04	1,000	Suntrust Bank	71,158 48	50.44	50,440 00
07-22-99	2,000	Teradata Corp.	27,300 48	38.36	76,720.00
01-30-06	1,000	Teva Pharmaceutical	41,991.52	15 42	15,420.00
8-1-00	1,500	Texas Instruments	68,604 77	94 50	141,750 00
6-16-98	1,116	United Technologies	35,119 13	106.48	118,831.68
1-9-12	2,000	Valero Energy Corp	37,105.93	74.97	149,940 00
1-9-12	1,826	Verizon	75,783 92	56 22	102,657.72
1-9-12	1,090	Vodafone Group	55,688 31	19 28	21,015 20

Kathryn Ames Foundation, Inc. | **I.D. #52-1828472** | **12/31/2018**

Form 990-PF | **Schedule 1**

Part II, Line 10b

CORPORATE STOCKS

DATE PURCH.	NO. SHS.	TYPE OF PROP.	COST BASIS	CUR. VAL. PER SH.	TOTAL CUR. VAL.
1-15-04	500	Wal-Mart	26,535 41	93 15	46,575.00
1-15-04	2,000	Wells Fargo	64,648.63	46.08	92,160 00
8-5-10	1,000	WEC Energy Group Inc	27,858 90	69.26	69,260 00
9-20-96	1,100	Yum Brands	6,461.94	91.92	101,112.00
9/20/96	1,100	Yum China Holdings	2,789 22	33 53	36,883 00
MUTUAL FUNDS					
1-15-04	8,766.34	Eaton Vance - Worldwide Hlth 'C'	100,000 00	10 51	92,134 20
	19,211 49	reinvestment - eaton vance	200,599.15		201,912.71
01-15-04	4,298.47	Europacific - Growth Fd F1	163,781 10	44 87	192,872 26
	4,233.46	reinvestment - europacific F1	186,414.01		189,955 13
1-12-04	8,582.82	Templeton - Developing Mkt A	156,000 00	18.17	155,949 77
	6,937 48	reinvestment - templeton	149,717.19		126,053 99
04-04-11	4,037.14	Greenspring Fund	100,000.00	19.77	79,814 30
	2,723.75	reinvestment - greenspring	63,163 90		53,848 52
ETFs					
03-05-09	1,500.00	IShares Dow Jones US Tech reinvestment - dow jones	48,481.95	159 93	239,895 00
03-05-09	2,700.00	IShares Tr US Energy Sec reinvestment - tr US energy	62,346.03	31 16	84,132 00
03-05-09	1,920.00	IShares Gbl Industrials Index reinvestment - industrials	48,730.80	77 92	149,606 40
03-05-09	4,600 00	IShares Consumer Staples reinvestment - consr staples	89,690.63	45.97	211,462.00
03-05-09	4,000 00	IShares Consumer Discretionary reinvestment - consr discret	103,292.40	100 89	403,560 00
06-29-10	2,000 00	IShares MSCI Israel reinvestment - MSCI Israel	92,760 67	48 42	96,840 00
04-10-17	870.00	Bluestar TA- BigTech Israel reinvestment - Bluestar	25,030.03	31 43	27,344 10
03-05-09	11,000 00	Financial Sel Sect SPDR XLF reinvestment - select sector XLF	37,962 47	23 82	262,020 00
03-05-09	1,530.00	Select Sector SPDR reinvestment - select sector XLRE	49,801.46	31 00	47,430 00
TOTAL VALUE OF CORPORATE STOCKS			**3,756,358.95**		**8,389,258.23**

ISRAEL BONDS

DATE PURCH.	NO. SHS.	TYPE OF PROP.	COST BASIS	CUR. VAL. PER SH.	TOTAL CUR. VAL.
5-20-99	100,000	Israel State 7.25% 12/15/2028	96,500.00	125.00	125,000.00
8-1-17	25,000	Israel Bd 10th Jubilee Fix 3Y 2.25% 8/1/2020	25,000.00	100.00	25,000.00
8-1-17	25,000	Israel Bd 10th Jubilee Fix 5Y 2.97% 8/1/2022	25,000.00	100.00	25,000.00
8-1-17	50,000	Israel Bd 10th Jubilee Fix 10Y 3.82% 8/1/2027	50,000.00	100.00	50,000.00
TOTAL VALUE OF ISRAEL BONDS			**196,500.00**		**225,000.00**

2018 Kathryn Ames Foundation I.D. '#52-1828472 12/31/2018
Form 990-PF Schedule 3

Capital Gains and Losses

STOCKS:

Date Purch	Stock Name	Shs Sold	Date Sold	Cost Basis	Selling Price	Gain/ Loss
10-30-95	Gen Elec Co	1,750	01-25-18	18,302.12	27,976.71	9,674.59
12-03-97	IBM	500	01-25-18	27,312.50	81,917.57	54,605.07
10-16-96	Safeway non					0 00
	trble CVR	2,000	02-26-18	2,029.80	1,772.70	(257.10)
10-16-96	Safeway PDC					0.00
	LLC non-tr CVF	2,000	04-25-18	97.60	5.36	(92.24)
07-08-99	Time Warnei	500	06-15-18	26,875.00	26,875.00	0.00
07-08-18	AT&T	0.50	06-15-18	21.76	15.81	(5.95)
10-06-96	Blkhwk Net	328	06-18-18	7,803.12	14,842.00	7,038.88
01-28-99	Mattel	2,240	09-18-18	34,819.94	37,031.41	2,211.47
07-22-99	NCR	2,000	09-18-18	24,829.52	56,188.52	31,359.00
07-22-99	CSX	1,500	10-25-18	12,907.19	99,488.20	86,581.01
10-30-95	Gen Elec Co	1,750	11-26-18	18,302.13	12,874.16	(5,427.97)
12-03-97	IBM	500	11-26-18	27,312.50	58,839.02	31,526.52
07-22-99	CSX	450	11-26-18	3,872.15	31,548.89	27,676.74
06-09-95	Pfizer Inc	600	11-26-18	5,062.50	25,786.30	20,723.80
06-06-97	Nike Inc	350	11-26-18	2,140.68	25,310.89	23,170.21
09-20-96	Pepsico Inc	200	11-26-18	5,370.68	23,017.49	17,646.81
01-15-04	JP Morgan	200	11-26-18	6,811.53	21,676.95	14,865.42
09-20-96	Amer Exp	190	11-26-18	2,497.50	20,546.88	18,049.38
03-31-97	Cisco Sys	450	11-26-18	2,821.88	20,286.17	17,464.29
10-09-04	Amgen Inc	100	11-26-18	5,633.00	19,158.74	13,525.74
07-27-95	Avery Denn	200	11-26-18	4,100.00	18,463.09	14,363.09
10-16-96	Proc & Gam	200	11-26-18	3,851.68	18,173.26	14,321.58
	Totals:			242,774.78	641,795.12	399,020.34

CAPITAL GAINS DISTRIBUTIONS:

	Selling Price	Gain/ Loss
Greenspring Fund	11,206.14	11,206.14
EV Worldwide Health	11,483.80	11,483.80
Amer Europacific Gwth F1	18,246 08	18,246.08
Welltower	1,115.24	1,115.24
Omega	26.68	26.68
Totals:	42,077.94	42,077.94
TOTAL GAIN/LOSS		**441,098.28**
TOTAL AMOUNT RECEIVED	**683,873.06**	

The Kathryn Ames Foundation

INSTRUCTIONS FOR GRANT APPLICATION AND GRANT GUIDELINES

About the Foundation

The Kathryn Ames Foundation, Inc is a private foundation that was formed in 1993 under the will of Kathryn Ames Ms. Ames left her legacy in honor of her parents, Max Freedland and Ida Freedland, in order to benefit organizations located in Israel that are working for charitable and benevolent purposes

The foundation is governed by a board of three directors. These directors make the final decision on all grants and expenditures made by the foundation

Grants Made by the Foundation

Eligibility

- Organization must use funds granted for charitable purposes in Israel
- Organization must be operated so that it does not discriminate in the provision of services based upon race, religion, religious affiliation, or ethnic or national origin
- Organization must have an exempt status under section 501(c)(3) of the United States Internal Revenue Code or the Board of Directors must be able to make a good faith determination that it is a public charity within the meaning of the Internal Revenue Code

Size and Duration of Grant

The average grant is between $5,000 and $15,000 Grants are usually awarded on a one-time basis Grantees should not assume that approval of a grant implies commitment to ongoing future support

Areas of Interest

The foundation makes grants to qualified charitable organizations that address the following areas of interest:

- Social and Economic Welfare
- Religious and Ethnic Pluralism
- Social Justice
- Education

Grant/Funding Type NOT Funded

- Individuals
- Special events/Benefit dinners
- Advertising/Publications
- Impermissible lobbying, legislative or political activities

Application Procedure

As of May, 2008, all applicants are required to submit a letter of inquiry before submitting a full grant application Before applying for a grant, applicants should carefully review the Foundation's guidelines. Once you have determined that your organization or project fits within the guidelines, a brief letter of inquiry should be submitted to the Foundation describing the program for which funds are being requested The letter, *not to exceed two pages*, should be submitted via email to info@kathrynames.org or by mail to Kathryn Ames Foundation, 305 W Chesapeake Avenue, Suite 308, Towson, Maryland 21204

The letter of inquiry should include the following:

- Name and brief description of your organization
- The purpose of the grant, including a description of proposed activity
- The timeframe for program or project for which funding is requested
- The geographic area, demographics of population, and number of individuals to be served by the program or project for which funding is requested
- The grant amount requested
- An estimate of the total cost of the program or project
- Totals of your organization's income and expenses from your organization's most recent fiscal year
- Contact name and title, phone number, email address

There is no deadline for the submission of letters of inquiry

All letters of inquiry are reviewed by Foundation Board and staff. Applicants will be notified by email or letter whether they are requested to submit a full proposal. Responses to letters of inquiry typically will be made within thirty days from the date received.

If it is determined from the letter of inquiry that the proposed project may meet the Foundation's priorities and interest, then the applicant will be permitted to submit a full grant application, a copy of which is available on the Foundation's website (www.kathrynames org) Applicants must use the foundation form in applying for a grant

Regrettably, the availability of grant funds permits a favorable response to only a limited number of requests Since the Foundation requests more proposals than it can fund, a decision to permit your organization to submit a full grant application should not be interpreted as an indication of likely support Lack of approval bears no reflection on the worthiness and merit of the proposal and organization submitting the request

Grant applications should contain a one-page cover letter summarizing the project, the amount requested and the timetable for the project, a completed grant application, and all attachments listed on the application form.

The foundation will notify you if additional information is required for your grant application package

Applications for grants should be delivered as follows:

Mail delivery:

W Michel Pierson, President
Kathryn Ames Foundation, Inc.
305 West Chesapeake Avenue, Suite 308
Towson, Maryland 21204

E-mail delivery Info@kathrynames.org

Fax delivery: 410-821-3007

Frequency of Application

The foundation receives numerous grant requests and is unable to fund all projects, although those projects may be well-designed and well-conceived Applicants should be aware that the fact their activities fall within the Foundation's funding guidelines does not assure that the Foundation will be able to provide funding. The Foundation will not entertain more than one grant request per year from any organization, regardless of whether funding is awarded.

Reporting Requirement

Organizations receiving funds must submit a report to the foundation detailing the use of the funds within one year of receiving a grant A grant report form will be provided with acknowledgment of grant **The grant report form should not be used as a request for additional funds** The use of the foundation's application form is required