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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

2019

Open to Public Inspection

For calendar year 2019, or tax year beginning 01-01-2019 , and ending 12-31-2019

Name of foundation
The Orton Family Foundation Inc

A Employer identification number
03-0346513

Number and street (or P.O. box number if mail is not delivered to street address) Room/suite
120 Graham Way

B Telephone number (see instructions)
(802) 495-0864

City or town, state or province, country, and ZIP or foreign postal code
Shelburne, VT 05482

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)* ▶$ 20,432,784

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).)*

	Line	Description	(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)	5,121,872			
	2	Check ▶ ☐ if the foundation is **not** required to attach Sch. B				
	3	Interest on savings and temporary cash investments	10,615	10,615	10,615	
	4	Dividends and interest from securities	322,056	322,056	322,056	
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	601,134			
	b	Gross sales price for all assets on line 6a 5,796,979				
	7	Capital gain net income (from Part IV, line 2)		601,134		
	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)	0			
	11	Other income (attach schedule)	1,504	0	1,504	
	12	**Total.** Add lines 1 through 11	6,057,181	933,805	334,175	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc.	393,185	21,748	21,748	313,941
	14	Other employee salaries and wages	914,441	1,551	1,551	909,789
	15	Pension plans, employee benefits	180,421	199	199	179,824
	16a	Legal fees (attach schedule)	3,022	0	0	0
	b	Accounting fees (attach schedule)	11,070	4,981	4,981	1,661
	c	Other professional fees (attach schedule)	56,432	56,432	56,432	0
	17	Interest	0	0	0	0
	18	Taxes (attach schedule) (see instructions)	98,512	1,183	1,183	87,365
	19	Depreciation (attach schedule) and depletion	28,237	428	428	
	20	Occupancy	72,424	1,097	1,097	69,132
	21	Travel, conferences, and meetings	481,568	1,782	1,782	465,409
	22	Printing and publications	12,156	0	0	12,156
	23	Other expenses (attach schedule)	548,046	3,534	3,534	504,764
	24	**Total operating and administrative expenses.** Add lines 13 through 23	2,799,514	92,935	92,935	2,544,041
	25	Contributions, gifts, grants paid	0			0
	26	**Total expenses and disbursements.** Add lines 24 and 25	2,799,514	92,935	92,935	2,544,041
	27	Subtract line 26 from line 12:				
	a	**Excess of revenue over expenses and disbursements**	3,257,667			
	b	**Net investment income** (if negative, enter -0-)		840,870		
	c	**Adjusted net income** (if negative, enter -0-)			241,240	

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	End of year (c) Fair Market Value
Assets	1	Cash—non-interest-bearing	190,558	127,391	127,391
	2	Savings and temporary cash investments	40,018	40,050	40,050
	3	Accounts receivable ▶ 0			
		Less: allowance for doubtful accounts ▶ 0	0	0	0
	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)		0	
	7	Other notes and loans receivable (attach schedule) ▶			
		Less: allowance for doubtful accounts ▶	0	0	0
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges	60,351	64,790	64,790
	10a	Investments—U.S. and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	13,626,264	17,709,995	17,709,995
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment: basis ▶			
		Less: accumulated depreciation (attach schedule) ▶		0	
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	549,519	2,399,989	2,399,989
	14	Land, buildings, and equipment: basis ▶ 200,939			
		Less: accumulated depreciation (attach schedule) ▶ 111,400	80,653	89,539	89,539
	15	Other assets (describe ▶)	1,030	1,030	1,030
	16	**Total assets** (to be completed by all filers—see the instructions. Also, see page 1, item I)	14,548,393	20,432,784	20,432,784
Liabilities	17	Accounts payable and accrued expenses	116,016	143,732	
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons		0	
	21	Mortgages and other notes payable (attach schedule)		0	
	22	Other liabilities (describe ▶)	0	0	
	23	**Total liabilities**(add lines 17 through 22)	116,016	143,732	
Net Assets or Fund Balances		**Foundations that follow FASB ASC 958, check here ▶ ☑ and complete lines 24, 25, 29 and 30.**			
	24	Net assets without donor restrictions	14,432,377	20,289,052	
	25	Net assets with donor restrictions	0	0	
		Foundations that do not follow FASB ASC 958, check here ▶ ☐ and complete lines 26 through 30.			
	26	Capital stock, trust principal, or current funds			
	27	Paid-in or capital surplus, or land, bldg., and equipment fund			
	28	Retained earnings, accumulated income, endowment, or other funds			
	29	**Total net assets or fund balances** (see instructions)	14,432,377	20,289,052	
	30	**Total liabilities and net assets/fund balances** (see instructions)	14,548,393	20,432,784	

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 29 (must agree with end-of-year figure reported on prior year's return)	1	14,432,377
2	Enter amount from Part I, line 27a	2	3,257,667
3	Other increases not included in line 2 (itemize) ▶	3	2,599,008
4	Add lines 1, 2, and 3	4	20,289,052
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 29	6	20,289,052

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1 a	Publicly Traded Securities	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	5,796,979	0	5,195,845	601,134
b				
c				
d				
e				

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) **or** Losses (from col.(h))
	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a	0	0	0	601,134
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	601,134
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 does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see 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))
2018	2,357,815	17,149,505	0.137486
2017	2,160,240	17,664,902	0.122290
2016	1,669,396	16,176,933	0.103196
2015	1,716,157	14,055,419	0.122099
2014	1,910,842	11,924,116	0.160250

2 Total of line 1, column (d)	2	0.645321
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	0.129064
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	16,300,607
5 Multiply line 4 by line 3	5	2,103,822
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	8,409
7 Add lines 5 and 6	7	2,112,231
8 Enter qualifying distributions from Part XII, line 4	8	2,544,041

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	8,409
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	8,409
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	8,409
6	Credits/Payments:		
a	2019 estimated tax payments and 2018 overpayment credited to 2019 — 6a — 17,645		
b	Exempt foreign organizations—tax withheld at source — 6b		
c	Tax paid with application for extension of time to file (Form 8868) — 6c		
d	Backup withholding erroneously withheld — 6d — 0		
7	Total credits and payments. Add lines 6a through 6d	7	17,645
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	9,236
11	Enter the amount of line 10 to be: **Credited to 2020 estimated tax** ▶ 9,236 **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		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition)	1b		No
	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		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation. ▶ $ 0 **(2)** On foundation managers. ▶ $ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities.*	2		No
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		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		No
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		No
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	Yes	
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	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ VT			
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	Yes	
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 2019 or the taxable year beginning in 2019? See the instructions for Part XIV. If "Yes," complete Part XIV	9	Yes	
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses.*	10		No

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		No
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		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	

Website address ▶www.orton.org

14 The books are in care of ▶Carol Bertrand Telephone no. ▶(802) 495-0864

Located at ▶120 Graham Way 126 Shelburne VT ZIP+4 ▶05482

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

			Yes	No
16	At any time during calendar year 2019, 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		No
	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		No
	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 2019?.		1c		No
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 2019, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2019?.	☐ 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 2019 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 2019.)*.		3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a		No
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 2019?		4b		No

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		No
	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 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, 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
See Additional Data Table				

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
Alece Montez 126 Graham Way 126 Shelburne, VT 05482	Director of Programs 40.00	122,008	10,730	0
Gabrielle Ratte Smith 126 Graham Way 126 Shelburne, VT 05482	Director of Networks 40.00	86,059	19,353	0
Alexis Halbert 126 Graham Way 126 Shelburne, VT 05482	Sr. Assoc. - Trainin 40.00	83,687	21,748	0
David Weaver 126 Graham Way 126 Shelburne, VT 05482	Chief Operating Offi 40.00	121,212	23,408	0
Sara Lightner 126 Graham Way 126 Shelburne, VT 05482	Director of Training 40.00	91,176	26,797	0
Total number of other employees paid over $50,000 ▶				5

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
JB LaFleur Consultants 5 Free Street Camden, ME 04843	Community Engagement Consulting	75,000
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 See Attached Statement	1,423,159
2 See Attached Statement	715,007
3 See Attached Statement	405,875
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	
2	
All other program-related investments. See instructions. **3**	
Total. Add lines 1 through 3 . . . . ▶	

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	**1a**	15,299,282
b	Average of monthly cash balances	**1b**	1,249,558
c	Fair market value of all other assets (see instructions)	**1c**	0
d	**Total** (add lines 1a, b, and c)	**1d**	16,548,840
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) — **1e** 0		
2	Acquisition indebtedness applicable to line 1 assets	**2**	0
3	Subtract line 2 from line 1d	**3**	16,548,840
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	**4**	248,233
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	**5**	16,300,607
6	**Minimum investment return.** Enter 5% of line 5	**6**	815,030

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

1	Minimum investment return from Part X, line 6	**1**	
2a	Tax on investment income for 2019 from Part VI, line 5 — **2a**		
b	Income tax for 2019. (This does not include the tax from Part VI.) — **2b**		
c	Add lines 2a and 2b	**2c**	
3	Distributable amount before adjustments. Subtract line 2c from line 1	**3**	
4	Recoveries of amounts treated as qualifying distributions	**4**	
5	Add lines 3 and 4	**5**	
6	Deduction from distributable amount (see instructions)	**6**	
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	**7**	0

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**	2,544,041
b	Program-related investments—total from Part IX-B	**1b**	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	**2**	0
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	**3a**	0
b	Cash distribution test (attach the required schedule)	**3b**	0
4	**Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	**4**	2,544,041
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**	8,409
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	**6**	2,535,632

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 2018	(c) 2018	(d) 2019
1 Distributable amount for 2019 from Part XI, line 7					0
2 Undistributed income, if any, as of the end of 2019:					
a Enter amount for 2018 only.					
b Total for prior years: 20___ , 20___ , 20___					
3 Excess distributions carryover, if any, to 2019:					
a From 2014.					
b From 2015.					
c From 2016.					
d From 2017.					
e From 2018.					
f **Total** of lines 3a through e.					
4 Qualifying distributions for 2019 from Part XII, line 4: ▶ $ __________					
a Applied to 2018, 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).		0			
d Applied to 2019 distributable amount.					
e Remaining amount distributed out of corpus					
5 Excess distributions carryover applied to 2019. *(If an amount appears in column (d), the same amount must be shown in column (a).)*					
6 **Enter the net total of each column as indicated below:**					
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5					
b Prior years' undistributed income. Subtract line 4b from line 2b					
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.					
d Subtract line 6c from line 6b. Taxable amount —see instructions					
e Undistributed income for 2018. Subtract line 4a from line 2a. Taxable amount—see instructions					
f Undistributed income for 2019. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020					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 2014 not applied on line 5 or line 7 (see instructions) . . .					
9 **Excess distributions carryover to 2020.** Subtract lines 7 and 8 from line 6a					
10 Analysis of line 9:					
a Excess from 2015. . . .					
b Excess from 2016. . . .					
c Excess from 2017. . . .					
d Excess from 2018. . . .					
e Excess from 2019. . . .					

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2019, enter the date of the ruling. . . . . ▶ 1995-08-18

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

	Tax year	Prior 3 years			(e) Total
	(a) 2019	**(b)** 2018	**(c)** 2017	**(d)** 2016	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	241,240	255,200	267,644	0	764,084
b 85% of line 2a	205,054	216,920	227,497	0	649,471
c Qualifying distributions from Part XII, line 4 for each year listed	2,544,041	2,357,815	2,160,240	1,669,396	8,731,492
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	2,544,041	2,357,815	2,160,240	1,669,396	8,731,492
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	543,353	571,650	588,830	539,231	2,243,064
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).)

Lyman Orton

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:

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*				
Total . . . . ▶ **3a**				
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	10,615	
4 Dividends and interest from securities. . . .			14	322,056	
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	601,134	
9 Net income or (loss) from special events:					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a Miscellaneous Program Service Revenue	900099				1,504
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e). .				933,805	1,504

13 Total. Add line 12, columns (b), (d), and (e). **13** 935,309

(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.)
11a	Various miscellaneous program service revenue and program reimbursements.

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

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.

******	2020-05-13	******
Signature of officer or trustee	Date	Title

May the IRS discuss this return with the preparer shown below (see instr.) ☑ Yes ☐ No

Paid Preparer Use Only

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ▶ ☐	PTIN
William S Huckabay CPA				P00154308
Firm's name ▶ Tapia & Huckabay PC				Firm's EIN ▶
Firm's address ▶ PO Box 38 Vergennes, VT 05491				Phone no. (802) 870-7086

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Lyman Orton 126 Graham Way 126 Shelburne, VT 05482	Chair 4.00	0	0	0
Susan Kirkpatrick 126 Graham Way 126 Shelburne, VT 05482	Secretary/Treasurer 2.00	5,000	0	0
Tom Daniels 126 Graham Way 126 Shelburne, VT 05482	Director 2.00	5,000	0	0
Jared Duval 126 Graham Way 126 Shelburne, VT 05482	Director 2.00	5,000	0	0
Janice Izzi 126 Graham Way 126 Shelburne, VT 05482	Director 2.00	0	0	0
Ed McMahon 126 Graham Way 126 Shelburne, VT 05482	Director 2.00	5,000	0	0
Scot Spencer 126 Graham Way 126 Shelburne, VT 05482	Director 2.00	5,000	0	0
Tony Wood 126 Graham Way 126 Shelburne, VT 05482	Director 2.00	6,000	0	0
David Leckey 126 Graham Way 126 Shelburne, VT 05482	Executive Director 40.00	215,827	27,237	0
Carol Bertrand 126 Graham Way 126 Shelburne, VT 05482	Director of Finance 40.00	93,239	21,881	0

TY 2019 Accounting Fees Schedule

Name: The Orton Family Foundation Inc

EIN: 03-0346513

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Vermont CPA Firm Audit & Tax Preparation Services	11,070	4,981	4,981	1,661

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2019 Gain/Loss from Sale of Other Assets Schedule

Name: The Orton Family Foundation Inc

EIN: 03-0346513

Gain Loss Sale Other Assets Schedule

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
Publicly Traded Securities		Purchased		Unrelated Third Parties	5,796,979	5,195,845	Cost	0	601,134	0

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TY 2019 General Explanation Attachment

Name: The Orton Family Foundation Inc

EIN: 03-0346513

General Explanation Attachment

Identifier	Return Reference	Explanation	
1		Part IX-A Summary of Direct Charitable Activities / Lines 1 & 2	Training Activities - The Foundation w orks to develop and implement Training Activities - The Foundation w orks to develop and implement Training Activities - The Foundation w orks to develop and implement Training Activities - The Foundation w orks to develop and implement Training Activities - The Foundation w orks to develop and implement Training Activities - The Foundation w orks to develop and implement Training Activities - The Foundation w orks to develop and implement Training Activities - The Foundation w orks to develop and implement Training Activities - The Foundation w orks to develop and implement Training Activities - The Foundation w orks to develop and implement

General Explanation Attachment

Identifier	Return Reference	Explanation	
2		Part IX-A Summary of Direct Charitable Activities / Line 3	strengthens and builds relationships that w ill spread aw areness andstrengthens and builds relationships that w ill spread aw areness andstrengthens and builds relationships that w ill spread aw areness andstrengthens and builds relationships that w ill spread aw areness andstrengthens and builds relationships that w ill spread aw areness andstrengthens and builds relationships that w ill spread aw areness and

TY 2019 Investments Corporate Stock Schedule

Name: The Orton Family Foundation Inc

EIN: 03-0346513

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
31sh Alphabet Inc.	41,521	41,521
3,190sh AT&T Inc.	124,665	124,665
788sh Comcast Corporation New	35,436	35,436
101sh Facebook Inc.	20,730	20,730
429sh T-Mobile US Inc.	33,642	33,642
582sh Twitter, Inc.	18,653	18,653
1,431sh Verizon Communications Common	87,863	87,863
271sh Walt Disney Company	39,195	39,195
703sh Allison Transmission Holdings	33,969	33,969
504sh Best Buy Company Inc.	44,251	44,251
286sh CDW Corporation	40,852	40,852
723sh DR Horton Inc.	38,138	38,138
1,032sh General Motors Company	37,771	37,771
254sh Home Depot Inc.	55,469	55,469
330sh Lennar Corporation	18,411	18,411
8sh Lennar Corporation Class B	358	358
294sh Marriott Vacations Worldwide	37,855	37,855
203sh McDonald's Corporation	40,115	40,115
715sh Target Corporation	91,670	91,670
376sh Tractor Supply Company	35,133	35,133
1,499sh Coca Cola Company	82,970	82,970
595sh General Mills Inc.	31,868	31,868
234sh Kimberly Clark Corporation	32,187	32,187
576sh Mondelez International Inc.	31,726	31,726
471sh Pepsico Inc.	64,372	64,372
858sh Philip Morris International	73,007	73,007
736sh Procter & Gamble Company Inc.	91,926	91,926
411sh Sysco Corporation	35,157	35,157
295sh Tyson Foods Inc.	26,857	26,857
257sh Walgreens Boots Alliance Inc.	15,153	15,153

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
1,213sh Cabot Oil & Gas Corporation	21,118	21,118
842sh Chevron Corporation	101,469	101,469
477sh ConocoPhillips	31,019	31,019
603sh Exxon Mobil Corporation	42,077	42,077
571sh Halliburton Holdings Company	13,972	13,972
400sh Marathon Petroleum Corporation	24,100	24,100
224sh Phillips 66	24,956	24,956
113sh Pioneer Natural Resources	17,105	17,105
415sh Valero Energy Corporation	38,865	38,865
297sh American Express Company	36,974	36,974
164sh Ameriprise Financial Inc.	27,319	27,319
1,961sh Bank America Corporation	69,066	69,066
87sh Blackrock Inc.	43,735	43,735
1,816sh Blackstone MTG TR Inc.	67,592	67,592
160sh Bok Financial Corporation	13,984	13,984
224sh Capital One Financial Corporation	23,052	23,052
869sh Citigroup Inc.	69,424	69,424
242sh Commerce Bancshares Inc.	16,441	16,441
139sh Cullen Frost Bankers Inc.	13,591	13,591
348sh East West Bancorp Inc.	16,948	16,948
1,511sh First Hawaiian Inc.	43,592	43,592
1,521sh JP Morgan Chase & Company	212,027	212,027
875sh Main Street Capital Corporation	37,721	37,721
2,128sh Metlife Inc.	108,464	108,464
1,427sh Morgan Stanley Group Inc.	72,948	72,948
3,084sh Old Republic International Corp.	68,989	68,989
381sh Prudential Financial Inc.	35,715	35,715
1,495sh Starwood Property Trust Inc.	37,166	37,166
527sh Truist Financial Corporation	29,681	29,681
1,312sh U.S. Bancorp Del Com New	77,788	77,788

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
1,660sh United Bancshares Inc.	64,176	64,176
1,352sh Wells Fargo & Company	72,738	72,738
484sh Amgen Inc.	116,678	116,678
129sh Becton Dickinson & Company	35,084	35,084
1,645sh Bristo-Myers Squibb Company	105,593	105,593
1,415sh CVS Health Corporation	105,120	105,120
258sh Danaher Corporation	39,598	39,598
987sh Gilead Sciences Inc.	64,135	64,135
304sh Hill-Rom Holdings Inc.	34,513	34,513
715sh Johnson & Johnson	104,297	104,297
1,211sh Merck & Company Inc.	110,140	110,140
2,363sh Pfizer Inc.	92,582	92,582
118sh Thermo Fisher Scientific Inc.	38,335	38,335
131sh UnitedHealth Group Inc.	38,511	38,511
198sh Avery Dennison Corporation	25,902	25,902
1,367sh Delta Air Lines Inc.	79,942	79,942
1,047sh Emerson Electric Company	79,844	79,844
125sh General Dynamics Corporation	22,044	22,044
257sh Lockheed Martin Corporation	100,071	100,071
161sh Norfolk Southern Corporation	31,255	31,255
301sh Oshkosh Corporation	28,490	28,490
120sh Parker Hannifin Corporation	24,698	24,698
641sh United Parcel Service	75,035	75,035
287sh Waste Management Inc.	32,707	32,707
274sh Adobe Inc.	90,368	90,368
130sh Ansys Inc.	33,463	33,463
158sh Apple Inc.	46,397	46,397
261sh Broadcom Inc.	82,481	82,481
2,876sh Cisco Systems Inc.	137,933	137,933
248sh Fidelity National Information Services	34,494	34,494

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
690sh Intel Corporation	41,297	41,297
434sh IBM Corporation	58,173	58,173
152sh LAM Research Corporation	44,445	44,445
137sh Mastercard Inc.	40,907	40,907
281sh Microchip Technology Inc.	29,426	29,426
587sh Microsoft Corporation	92,570	92,570
297sh PayPal Holdings Inc.	32,126	32,126
1,258sh Qualcomm Inc.	110,993	110,993
215sh VISA Inc.	40,399	40,399
101sh Air Products & Chemicals Inc.	23,734	23,734
1,703sh Dow Inc.	93,205	93,205
97sh Martin Marietta Materials Inc.	27,125	27,125
198sh PPG Industries	26,431	26,431
64sh American Tower Corporation	14,708	14,708
266sh Crown Castle International	37,812	37,812
225sh Equity Lifestyle Properties	15,838	15,838
977sh Hannon Armstrong Sustainable Inc.	31,440	31,440
1,482sh Park Hotels & Resorts Inc. REIT	38,339	38,339
377sh Store Capital Corporation	14,039	14,039
100sh Sun Communities Inc. REIT	15,010	15,010
869sh Ventas Inc.	50,176	50,176
711sh American Electric Power Company	67,197	67,197
541sh Duke Energy Holding Corporation	49,345	49,345
346sh Eversource Energy	29,434	29,434
1,606sh FirstEnergy Corporation	78,052	78,052
513sh Nextera Energy Inc.	124,228	124,228
3,300sh IShares Russell 1000 Growth ETF	580,536	580,536
4,495sh IShares Russell 1000 Value ETF	613,478	613,478
22,954sh MSIF Growth Portfolio	1,072,639	1,072,639
5,937sh SPDR S&P 500 ETF	1,910,883	1,910,883

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
15,600sh IShares Russell 2000 ETF	2,584,452	2,584,452
176sh Accenture PLC	37,060	37,060
325sh Alcon Inc.	18,385	18,385
221sh Allegion PLC	27,523	27,523
1,486sh BP PLC Sponsored ADR	56,082	56,082
132sh Chubb Limited	20,547	20,547
256sh Ingersoll-Rand Public Limited	34,028	34,028
2,019sh Johnson Controls International PLC	82,193	82,193
239sh Medtronic PLC	27,115	27,115
2,277sh Mitsubishi UFJ Financial Group ADR	12,364	12,364
242sh Novartis AG ADR	22,915	22,915
804sh Schlumberger Limited	32,321	32,321
384sh Sony Corporation Spons ADR	26,112	26,112
1,694sh Suncor Energy Inc.	55,563	55,563
1,175sh Toronto-Dominion Bank	65,953	65,953
365sh Unilever NV	20,973	20,973
5,932sh IShares Core MSCI	387,004	387,004
33,569sh WCM Focused Intl Growth	672,607	672,607
11,959sh IShares Core MSCI Emerging	642,916	642,916
170,434sh Wilmington International Fund	1,521,973	1,521,973
51,282sh Wilmington Global Alpha Equities Fund	607,693	607,693
62,517sh Blackrock Event Driven Equity Fund	605,789	605,789

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TY 2019 Investments - Other Schedule

Name: The Orton Family Foundation Inc

EIN: 03-0346513

Investments Other Schedule 2

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
Cash & Money Market Funds in Investment Portfolio		2,399,989	2,399,989

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TY 2019 Land, Etc. Schedule

Name: The Orton Family Foundation Inc

EIN: 03-0346513

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
Office Equipment & Furnishings	110,071	73,086	36,985	
Leasehold Improvements	18,917	11,650	7,267	
Websites	71,951	26,664	45,287	

TY 2019 Legal Fees Schedule

Name: The Orton Family Foundation Inc

EIN: 03-0346513

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Vermont Attorney Human Resource Matters	2,403	0	0	0
Colorado Attorney Human Resource Matters	479	0	0	0
Vermont Attorney Trademarks	120	0	0	0
Miscellaneous Fees Various	20	0	0	0

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TY 2019 Other Assets Schedule

Name: The Orton Family Foundation Inc

EIN: 03-0346513

Other Assets Schedule

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
Trademark	1,030	1,030	1,030

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TY 2019 Other Expenses Schedule

Name: The Orton Family Foundation Inc

EIN: 03-0346513

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Advertising & Promotion	925	0	0	925
Bank & Credit Card Fees	3,106	89	89	2,840
Consultants & Subcontractors	403,912	2,771	2,771	395,598
Dues & Subscriptions	33,849	25	25	33,773
Equipment Costs	27,717	182	182	27,169
Insurance	13,644	207	207	13,024
Postage	3,927	37	37	3,816
Professional Development	10,910	153	153	10,450
Supplies	21,332	25	25	21,256
Telephone & Internet	28,724	45	45	28,590

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Subtract: Accrual to Cash Change:	0	0	0	-32,677
Amortization	0	0	0	0

TY 2019 Other Income Schedule

Name: The Orton Family Foundation Inc

EIN: 03-0346513

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Miscellaneous Program Service Revenue	1,504	0	1,504

TY 2019 Other Increases Schedule

Name: The Orton Family Foundation Inc

EIN: 03-0346513

Description	Amount
Unrealized Gain on Investments	2,599,008

TY 2019 Other Professional Fees Schedule

Name: The Orton Family Foundation Inc

EIN: 03-0346513

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Inv. Manager #1 Investment Management Services	48,490	48,490	48,490	0
Inv. Manager #2 Investment Management Services	7,942	7,942	7,942	0

TY 2019 Taxes Schedule

Name: The Orton Family Foundation Inc

EIN: 03-0346513

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Payroll Taxes	90,912	1,183	1,183	87,365
Federal Excise Taxes	7,600	0	0	0

Schedule B **(Form 990, 990-EZ, or 990-PF)** Department of the Treasury Internal Revenue Service	**Schedule of Contributors** ▶ **Attach to Form 990, 990-EZ, or 990-PF.** ▶ **Go to *www.irs.gov/Form990* for the latest information.**	OMB No. 1545-0047 **2019**

Name of the organization	**Employer identification number**
The Orton Family Foundation Inc	03-0346513

Organization type (check one):

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

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

General Rule

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

Special Rules

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

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than $1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling $5,000 or more during the year . . . . ▶ $ ____________

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

Name of organization
The Orton Family Foundation Inc

Employer identification number
03-0346513

Part I **Contributors**

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	Lyman Orton PO Box 775850 Steamboat Springs, CO 80477	$ 5,117,852	☑ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)

Name of organization	Employer identification number
The Orton Family Foundation Inc	03-0346513

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

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

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

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

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

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

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

Name of organization	Employer identification number
The Orton Family Foundation Inc	03-0346513

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

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

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

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
-	

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

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
-	

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

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
-	

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

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
-	