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Form **990-PF****Return of Private Foundation**  
or Section 4947(a)(1) Trust Treated as Private Foundation

OMB No 1545-0047

**2019**Department of the Treasury  
Internal Revenue Service

- Do not enter social security numbers on this form as it may be made public.  
► Go to [www.irs.gov/Form990PF](http://www.irs.gov/Form990PF) for instructions and the latest information.

Open to Public Inspection

For calendar year 2019 or tax year beginning

, 2019, and ending

, 20

Name of foundation

**Parkinson Family Foundation**

A Employer identification number

**06-1485191**

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

Room/suite

B Telephone number (see instructions)

**94 Perkins Road****(203) 869-1304**

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

**Greenwich, CT 06830**

G Check all that apply

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name changeC If exemption application is pending, check here ☐ **6**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 foundationE If private foundation status was terminated under section 507(b)(1)(A), check here ☐

I Fair market value of all assets at

J Accounting method

☒ Cash☐ Accrual

end of year (from Part II, col (c),

☐ Other (specify)line 16) ► \$ **1,283,875**

(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)	70,218			
	2	Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3	Interest on savings and temporary cash investments STM001	255	255	N/A	
	4	Dividends and interest from securities STM002	22,431	22,431		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10 STM003	112,892			
	b	Gross sales price for all assets on line 6a 227,762				
	7	Capital gain net income (from Part IV, line 2)		112,892		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
Operating and Administrative Expenses	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule) STM106	510	10		
	12	Total. Add lines 1 through 11	206,306	135,588		
	13	Compensation of officers, directors, trustees, etc				
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)				
	c	Other professional fees (attach schedule) STM109	10,000	2,000		8,000
	17	Interest RECEIVED STM004	11	11		
	18	Taxes (attach schedule) (see instructions) STM110	3,102	602		
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy MAY 06 2020				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)				
	24	Total operating and administrative expenses. Add lines 13 through 23	13,113	2,613		8,000
	25	Contributions, gifts, grants paid	52,000			52,000
	26	Total expenses and disbursements. Add lines 24 and 25	65,113	2,613		60,000
	27	Subtract line 26 from line 12				
	a	Excess of revenue over expenses and disbursements	141,193			
	b	Net investment income (if negative, enter -0-)		132,975		
	c	Adjusted net income (if negative, enter -0-)			0	

For Paperwork Reduction Act Notice, see instructions.

Form 990-PF (2019)

EEA

23

Part II Balance Sheets		Beginning of year	End of year	
Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing . . . . .			
	2 Savings and temporary cash investments . . . . .	118,608	285,740	285,740
	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 . . . . .			
	10a Investments - U S and state government obligations (attach schedule)			
	b Investments - corporate stock (attach schedule) . . . . .			
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) . . . . . STM118 . . . . .	859,937	784,784	998,135	
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) . . . . .	978,545	1,070,524	1,283,875	
Liabilities	17 Accounts payable and accrued expenses . . . . .			
	18 Grants payable . . . . .		17,000	
	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) . . . . .	0	17,000		
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here and complete lines 24, 25, 29, and 30. ▶ <input type="checkbox"/>			
	24 Net assets without donor restrictions . . . . .			
	25 Net assets with donor restrictions . . . . .			
	Foundations that do not follow FASB ASC 958, check here and complete lines 26 through 30. ▶ <input checked="" type="checkbox"/>			
	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 . . . . .	978,545	1,053,524	
29 Total net assets or fund balances (see instructions) . . . . .	978,545	1,053,524		
30 Total liabilities and net assets/fund balances (see instructions) . . . . .	978,545	1,070,524		

## 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	978,545
2 Enter amount from Part I, line 27a . . . . .	2	141,193
3 Other increases not included in line 2 (itemize) ▶ . . . . .	3	
4 Add lines 1, 2, and 3 . . . . .	4	1,119,738
5 Decreases not included in line 2 (itemize) ▶ STM116 . . . . .	5	66,214
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29 . . . . .	6	1,053,524

**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)
<b>1a Exchange-traded Funds</b> see STM005 for details	P	VARIOUS	VARIOUS
<b>b Exchange-traded Funds</b>	D	VARIOUS	VARIOUS
<b>c Exchange-traded Funds</b>	P	VARIOUS	VARIOUS
<b>d Boeing Co common stock</b>	D	05-12-1993	12-04-2019
<b>e</b>			

  

(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))
<b>a</b> 67,256		52,830	14,426
<b>b</b> 54,026		23,223	30,803
<b>c</b> 36,622		34,812	1,810
<b>d</b> 69,858		4,005	65,853
<b>e</b>			

  

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))
<b>a</b>			14,426
<b>b</b>			30,803
<b>c</b>			1,810
<b>d</b>			65,853
<b>e</b>			

  

<b>2</b> 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	112,892
<b>3</b> 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	N/A

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2018	49,500	1,072,913	0.046136
2017	54,999	988,964	0.055613
2016	45,830	876,914	0.052263
2015	42,250	774,741	0.054534
2014	30,812	762,824	0.040392

  

<b>2</b> Total of line 1, column (d) . . . . .	2	0.248938
<b>3</b> 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	0.049788
<b>4</b> Enter the net value of noncharitable-use assets for 2019 from Part X, line 5 . . . . .	4	1,142,454
<b>5</b> Multiply line 4 by line 3 . . . . .	5	56,880
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b) . . . . .	6	1,330
<b>7</b> Add lines 5 and 6 . . . . .	7	58,210
<b>8</b> Enter qualifying distributions from Part XII, line 4 . . . . . If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions	8	60,000

3

**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 <input type="checkbox"/> 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 <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	1,330
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	1,330
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)	4	0
5	<b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-	5	1,330
6	Credits/Payments		
a	2019 estimated tax payments and 2018 overpayment credited to 2019	6a	2,352
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	
7	Total credits and payments. Add lines 6a through 6d	7	2,352
8	Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	
9	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b>	9	
10	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b>	10	1,022
11	Enter the amount of line 10 to be <b>Credited to 2020 estimated tax</b> 1,022 <b>Refunded</b>	11	

**Part VII-A Statements Regarding Activities**

	Yes	No
1a		X
b		X
c		X
d		
e		
2		X
3		X
4a		X
b		
5		X
6		
7	X	
8a		
b	X	
9		X
10	X	

**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 ▶ <u>www.parkinsonfdn.org</u>		
14 The books are in care of ▶ <u>Foundation Services LLC</u> Telephone no ▶ <u>703-726-4973</u>		
Located at ▶ <u>44604 Wellsboro Drive, Ashburn, VA</u> ZIP+4 ▶ <u>20147-2535</u>		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here . . . . .	15	N/A
and enter the amount of tax-exempt interest received or accrued during the year . . . . .		
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	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? . . . . .	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? . . . . .	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? . . . . .	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? . . . . .	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)? . . . . .	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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) . . . . .	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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 . . . . .	N/A	1b
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
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 (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2019? . . . . .	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
If "Yes," list the years ▶ _____, _____, _____, _____		
b Are there any years listed in 2a for which the foundation is <b>not</b> 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) . . . . .	N/A	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 ▶ _____, _____, _____, _____		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? . . . . .	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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 Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019) . . . . .	N/A	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? . . . . .		4a
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

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

<b>5a</b>	During the year, did the foundation pay or incur any amount to		Yes	No
(1)	Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
<b>b</b>	If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions	N/A	<b>5b</b>	
	Organizations relying on a current notice regarding disaster assistance check here	<input type="checkbox"/>		
<b>c</b>	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	N/A <input type="checkbox"/> Yes <input type="checkbox"/> No		
	If "Yes," attach the statement required by Regulations section 53.4945-5(d)			
<b>6a</b>	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
<b>b</b>	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		<b>6b</b>	X
	If "Yes" to 6b, file Form 8870			
<b>7a</b>	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
<b>b</b>	If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	N/A	<b>7b</b>	
<b>8</b>	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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		

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

<b>1 List all officers, directors, trustees, and foundation managers and their compensation. See instructions.</b>				
(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
Geoffrey M Parkinson Jr. 94 Perkins Road, Greenwich, CT 06830	President 2.00	0	0	0
Deborah P Hires 94 Perkins Road, Greenwich, CT 06830	Treasurer 0.30	0	0	0
Heather P Wright 94 Perkins Road, Greenwich, CT 06830	Secretary 0.30	0	0	0
<b>2 Compensation of five highest-paid employees (other than those included on line 1 - see instructions). If none, enter "NONE."</b>				
(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				
<b>Total number of other employees paid over \$50,000</b>				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.)

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	931,271
<b>b</b>	Average of monthly cash balances	<b>1b</b>	228,581
<b>c</b>	Fair market value of all other assets (see instructions)	<b>1c</b>	0
<b>d</b>	<b>Total</b> (add lines 1a, b, and c)	<b>1d</b>	1,159,852
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	0
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	1,159,852
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	<b>4</b>	17,398
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4.	<b>5</b>	1,142,454
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	57,123

**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.)

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	57,123
<b>2a</b>	Tax on investment income for 2019 from Part VI, line 5	<b>2a</b>	1,330
<b>b</b>	Income tax for 2019 (This does not include the tax from Part VI)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	1,330
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	55,793
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	
<b>5</b>	Add lines 3 and 4	<b>5</b>	55,793
<b>6</b>	Deduction from distributable amount (see instructions)	<b>6</b>	
<b>7</b>	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	<b>7</b>	55,793

**Part XII** Qualifying Distributions (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
<b>a</b>	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	<b>1a</b>	60,000
<b>b</b>	Program-related investments - total from Part IX-B	<b>1b</b>	
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	<b>4</b>	60,000
<b>5</b>	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.	<b>5</b>	1,330
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4.	<b>6</b>	58,670

**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
<b>1</b> Distributable amount for 2019 from Part XI, line 7 . . . . .				55,793
<b>2</b> Undistributed income, if any, as of the end of 2019				
<b>a</b> Enter amount for 2018 only . . . . .				
<b>b</b> Total for prior years . . . . .				
<b>3</b> Excess distributions carryover, if any, to 2019				
<b>a</b> From 2014 . . . . .				
<b>b</b> From 2015 . . . . .	4,086			
<b>c</b> From 2016 . . . . .	4,399			
<b>d</b> From 2017 . . . . .	6,993			
<b>e</b> From 2018 . . . . .				
<b>f</b> Total of lines 3a through e . . . . .	15,478			
<b>4</b> Qualifying distributions for 2019 from Part XII, line 4 ▶ \$ 60,000				
<b>a</b> Applied to 2018, but not more than line 2a . . . . .				
<b>b</b> Applied to undistributed income of prior years (Election required - see instructions) . . . . .				
<b>c</b> Treated as distributions out of corpus (Election required - see instructions) . . . . .				
<b>d</b> Applied to 2019 distributable amount . . . . .				55,793
<b>e</b> Remaining amount distributed out of corpus . . . . .	4,207			
<b>5</b> Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount must be shown in column (a) ) . . . . .				
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5 . . . . .	19,685			
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b . . . . .				
<b>c</b> 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 . . . . .				
<b>d</b> Subtract line 6c from line 6b Taxable amount - see instructions . . . . .				
<b>e</b> Undistributed income for 2018 Subtract line 4a from line 2a Taxable amount - see instructions . . . . .				
<b>f</b> Undistributed income for 2019 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2020 . . . . .				0
<b>7</b> 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) . . . . .				
<b>8</b> Excess distributions carryover from 2014 not applied on line 5 or line 7 (see instructions) . . . . .				
<b>9</b> Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a . . . . .	19,685			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2015 . . . . .	4,086			
<b>b</b> Excess from 2016 . . . . .	4,399			
<b>c</b> Excess from 2017 . . . . .	6,993			
<b>d</b> Excess from 2018 . . . . .				
<b>e</b> Excess from 2019 . . . . .	4,207			

**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 N/A

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

**2a** Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

Tax year	Prior 3 years			(e) Total
(a) 2019	(b) 2018	(c) 2017	(d) 2016	
85% of line 2a				
Qualifying distributions from Part XII, line 4 for each year listed				
Amounts included in line 2c not used directly for active conduct of exempt activities				
Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c				
<b>3</b> Complete 3a, b, or c for the alternative test relied upon				
<b>a</b> "Assets" alternative test - enter				
<b>(1)</b> Value of all assets				
<b>(2)</b> Value of assets qualifying under section 4942(j)(3)(B)(i)				
<b>b</b> "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed				
<b>c</b> "Support" alternative test - enter				
<b>(1)</b> Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)				
<b>(2)</b> Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)				
<b>(3)</b> Largest amount of support from an exempt organization				
<b>(4)</b> 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

**2a-2d: See STM006**

**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
<b>a</b> Paid during the year {See Following Statement}				52,000
<b>Total</b>			<b>3a</b>	52,000
<b>b</b> Approved for future payment {See Following Statement}				15,000
<b>Total</b>			<b>3b</b>	15,000



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

		Yes	No
<b>1</b>	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?		
<b>a</b>	Transfers from the reporting foundation to a noncharitable exempt organization of		
	(1) Cash . . . . .	<b>1a(1)</b>	<b>X</b>
	(2) Other assets . . . . .	<b>1a(2)</b>	<b>X</b>
<b>b</b>	Other transactions		
	(1) Sales of assets to a noncharitable exempt organization . . . . .	<b>1b(1)</b>	<b>X</b>
	(2) Purchases of assets from a noncharitable exempt organization . . . . .	<b>1b(2)</b>	<b>X</b>
	(3) Rental of facilities, equipment, or other assets . . . . .	<b>1b(3)</b>	<b>X</b>
	(4) Reimbursement arrangements . . . . .	<b>1b(4)</b>	<b>X</b>
	(5) Loans or loan guarantees . . . . .	<b>1b(5)</b>	<b>X</b>
	(6) Performance of services or membership or fundraising solicitations . . . . .	<b>1b(6)</b>	<b>X</b>
<b>c</b>	Sharing of facilities, equipment, mailing lists, other assets, or paid employees . . . . .	<b>1c</b>	<b>X</b>
<b>d</b>	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		

[illegible]

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

**b** If "Yes," complete the following schedule

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

**Sign  
Here**

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

Signature of officer or trustee

Date \_\_\_\_\_

President  
Title

Title

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
------

Firm's name ▶

Firm's EIN ▶

Firm's address ▶

Phone no

**The Parkinson Family Charitable Foundation, Inc**

**EIN: 06-1485191**

**Form 990-PF, 01/01/19-12/31/19**

**PART I, LINE 25 AND PART XV, LINE 3(a)**

**GRANTS AND CONTRIBUTIONS MADE DURING YEAR**

<b><u>NAME AND ADDRESS</u></b>	<b><u>RELATIONSHIP</u></b>	<b><u>STATUS OF RECIPIENT</u></b>	<b><u>PURPOSE</u></b>	<b><u>AMOUNT</u></b>
Friends Of Forman Christian College Inc 3434 Roswell Road, NW Atlanta, Georgia 30305	N/A	PC	Education Scholarships	2,000 00
Global PEHT 105 Woodside Drive Greenwich, Connecticut 06830	N/A	PC	Human Trafficking Prevention & Relief	2,000 00
The Grace Notes, Inc. P O Box 14 Old Greenwich, CT 06870	N/A	PC	Community Enrichment Through Music	1,000 00
Greenwich Center for Hope and Renewal 237 Taconic Road Greenwich, CT 06831	N/A	PC	Counseling Scholarships	4,000 00
Greenwich Chaplaincy Services 70 Parsonage Road Greenwich, Connecticut 06830	N/A	PC	Chaplaincy Services	1,000.00
Greenwich Chaplaincy Services 70 Parsonage Road Greenwich, Connecticut 06830	N/A	PC	Chaplaincy Services	1,000 00
Greenwich Country Day School Old Church Road Greenwich, CT 06836-0623	N/A	PC	School Capital Campaign	5,000 00
Greenwich Family YMCA 50 East Putnam Ave Greenwich, Connecticut 06830	N/A	PC	Youth Development	1,000 00
Luis Palau Association 1500 NW 167th Place Beaverton, Oregon 97006	N/A	PC	Leadership Development	2,000 00
The Marshall Legacy Institute 2425 Wilson Blvd, Suite 240 Arlington, VA 22201	N/A	PC	Landmine Eradication Support & Education	5,000 00
Partnership For Resource Development Inc 1403 Sommerton Way Chesapeake, Virginia 23320	N/A	PC	Discipleship Ministry	1,000 00
Pivot Ministries Inc. 485 Jane Street Bridgeport, CT 06608	N/A	PC	Addiction Recovery	1,500 00
The Seed Company 220 Westway Place Arlington, Texas 76018	N/A	PC	Bible Translation	5,000 00

**The Parkinson Family Charitable Foundation, Inc**

**EIN: 06-1485191**

**Form 990-PF, 01/01/19-12/31/19**

**PART I, LINE 25 AND PART XV, LINE 3(a)**

**GRANTS AND CONTRIBUTIONS MADE DURING YEAR**

<u>NAME AND ADDRESS</u>	<u>RELATIONSHIP</u>	<u>STATUS OF RECIPIENT</u>	<u>PURPOSE</u>	<u>AMOUNT</u>
Spirit of America 1100 N Glebe Road Arlington, VA 22201	N/A	PC	Human Services	2,500.00
Stanwich Congregational Church 202 Taconic Road Greenwich, CT 06831	Employer	PC	Church Operations	5,000.00
Stanwich Congregational Church 202 Taconic Road Greenwich, CT 06831	Employer	PC	Clergy Programs	5,000.00
University of Virginia P O Box 400807 Charlottesville, VA 22904-4807	N/A	PC	Historical Preservation	1,000 00
Virginia Athletics Foundation P O Box 400833 Charlottesville, VA 22907-3015	N/A	PC	Athletic Program Support	1,500 00
Waterside School 770 Pacific Street Stamford, Connecticut 06902	N/A	PC	School Support	2,500 00
World Vision Inc 34834 Weyerhaeuser Way South Federal Way, WA 98063-9716	N/A	PC	Water & Sanitation Education & Projects	3,000 00
<b>TOTAL</b>				<b>52,000.00</b>

**The Parkinson Family Charitable Foundation, Inc**

**EIN: 06-1485191**

**Form 990-PF, 01/01/19-12/31/19**

**PART XV, LINE 3(b)**

**GRANTS AND CONTRIBUTIONS APPROVED FOR FUTURE USE**

<b><u>NAME AND ADDRESS</u></b>	<b><u>RELATIONSHIP</u></b>	<b><u>STATUS OF RECIPIENT</u></b>	<b><u>PURPOSE</u></b>	<b><u>AMOUNT</u></b>
Greenwich Center for Hope and Renewal 237 Taconic Road Greenwich, CT 06831	N/A	PUBLIC	Counseling Scholarships	5,000 00
Greenwich Country Day School Old Church Road Greenwich, CT 06836-0623	N/A	PUBLIC	School Capital Campaign	5,000 00
The Seed Company 220 Westway Place, Suite 100 Arlington, Texas 76018	N/A	PUBLIC	Bible Translation	5,000.00
<b>TOTAL</b>				<b>15,000.00</b>



The Parkinson Family Charitable Foundation, Inc  
 EIN: 06-1485191  
 2019 Return of Private Foundation (Form 990-PF)

**Attachment to Part X Minimum Investment Return**

Part X, Line 1a - Average Monthly Fair Market Value of Securities

NOTE: The fair market value of securities (excluding cash) determined by averaging the fair market value of the entire securities portfolio on the first and last days of each month.

DATE	BEGINNING OF MONTH	ENDING OF MONTH	AVERAGE
Jan-19	\$ 931,507.05	\$ 933,485.86	\$ 932,496.46
Feb-19	\$ 933,485.86	\$ 919,492.32	\$ 926,489.09
Mar-19	\$ 919,492.32	\$ 924,777.65	\$ 922,134.99
Apr-19	\$ 924,777.65	\$ 895,892.11	\$ 910,334.88
May-19	\$ 895,892.11	\$ 859,832.90	\$ 877,862.51
Jun-19	\$ 859,832.90	\$ 916,130.72	\$ 887,981.81
Jul-19	\$ 916,130.72	\$ 916,838.07	\$ 916,484.40
Aug-19	\$ 916,838.07	\$ 920,347.57	\$ 918,592.82
Sep-19	\$ 920,347.57	\$ 929,360.98	\$ 924,854.28
Oct-19	\$ 929,360.98	\$ 951,504.72	\$ 940,432.85
Nov-19	\$ 951,504.72	\$ 1,042,764.15	\$ 997,134.44
Dec-19	\$ 1,042,764.15	\$ 998,135.28	\$ 1,020,449.72

Average Fair Market Value of Securities **\$ 931,270.68**

Part X, Line 1b - Average Monthly Cash Balances

DATE	BEGINNING OF MONTH	ENDING OF MONTH	AVERAGE
Jan-19	\$ 118,608.35	\$ 194,119.62	\$ 156,363.99
Feb-19	\$ 194,119.62	\$ 231,381.78	\$ 212,750.70
Mar-19	\$ 231,381.78	\$ 233,639.82	\$ 232,510.80
Apr-19	\$ 233,639.82	\$ 274,429.78	\$ 254,034.80
May-19	\$ 274,429.78	\$ 256,426.58	\$ 265,428.18
Jun-19	\$ 256,426.58	\$ 257,110.13	\$ 256,768.36
Jul-19	\$ 257,110.13	\$ 232,697.75	\$ 244,903.94
Aug-19	\$ 232,697.75	\$ 212,506.71	\$ 222,602.23
Sep-19	\$ 212,506.71	\$ 215,632.15	\$ 214,069.43
Oct-19	\$ 215,632.15	\$ 216,100.46	\$ 215,866.31
Nov-19	\$ 216,100.46	\$ 216,754.78	\$ 216,427.62
Dec-19	\$ 216,754.78	\$ 285,739.58	\$ 251,247.18

Average of Monthly Cash Balances **\$ 228,581.13**

## Schedule of Contributors

OMB No 1545-0047

2019

- Attach to Form 990, Form 990-EZ, or Form 990-PF  
► Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information

Name of the organization

Parkinson Family Foundation

Employer identification number

06-1485191

Organization type (check one)

Filers of

Section

Form 990 or 990-EZ

- ☐ 501(c)( ) (enter number) organization
- ☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation
- ☐ 527 political organization

Form 990-PF

- ☒ 501(c)(3) exempt private foundation
- ☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
- ☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the General Rule or a Special Rule

Note Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions

### General Rule

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

### Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000, or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 exclusively for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals Complete Parts I, II, and III
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions exclusively for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000 If this box is checked, enter here the total contributions that were received during the year for an exclusively religious, charitable, etc., purpose Don't complete any of the parts unless the General Rule applies to this organization because it received nonexclusively religious, charitable, etc., contributions totaling \$5,000 or more during the year..... ► \$ \_\_\_\_\_

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

Name of organization  
Parkinson Family Foundation

Employer identification number  
06-1485191

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

(a) No	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	Geoffrey & Elizabeth Parkinson  c/o Parkinson Family Foundation  Greenwich, CT 06830	\$ 70,218	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions )
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )

Employer identification number

06-1485191

## Part II

(a) No. from Part I	(b) <b>Description of noncash property given</b>	(c) <b>FMV (or estimate)</b> (See instructions)	(d) <b>Date received</b>
<u>  1  </u>	<u>200 shares of Boeing</u> <u>Company common stock</u>  	\$ <u>            70,218        </u>	<u>     11-04-2019     </u>
(a) No. from Part I	(b) <b>Description of noncash property given</b>	(c) <b>FMV (or estimate)</b> (See instructions)	(d) <b>Date received</b>
<u>      </u>	    	\$ _____	_____
(a) No. from Part I	(b) <b>Description of noncash property given</b>	(c) <b>FMV (or estimate)</b> (See instructions)	(d) <b>Date received</b>
<u>      </u>	    	\$ _____	_____
(a) No. from Part I	(b) <b>Description of noncash property given</b>	(c) <b>FMV (or estimate)</b> (See instructions)	(d) <b>Date received</b>
<u>      </u>	    	\$ _____	_____
(a) No. from Part I	(b) <b>Description of noncash property given</b>	(c) <b>FMV (or estimate)</b> (See instructions)	(d) <b>Date received</b>
<u>      </u>	    	\$ _____	_____
(a) No. from Part I	(b) <b>Description of noncash property given</b>	(c) <b>FMV (or estimate)</b> (See instructions)	(d) <b>Date received</b>
<u>      </u>	    	\$ _____	_____

The Parkinson Family Charitable Foundation, Inc  
 EIN: 06-1485191  
 2019 Return of Private Foundation (Form 990-PF) - ATTACHMENTS

**Part I** Attachment to Part I Analysis of Revenues and Expenses

**STATEMENT 001**

<b>Line 3</b>	Interest on savings and temporary cash	Revenue & Expenses Per Books	Net Investment Income	Adjusted Net Income	Charitable Purposes
<u>Interest</u>					
	Morgan Stanley Smith Barney	\$ 255	\$ 255	\$ -	\$ -
		\$ 255	\$ 255	\$ 0	\$ 0

**STATEMENT 002**

<b>Line 4</b>	Dividends & interest from securities	Revenue & Expenses Per Books	Net Investment Income	Adjusted Net Income	Charitable Purposes
<u>Dividends</u>					
	Fidelity Investments	\$ 18,562	\$ 18,562	\$ -	\$ -
	Morgan Stanley Smith Barney	\$ 1,995	\$ 2,192	\$ -	\$ -
<u>Interest</u>					
	Fidelity Investments	\$ 1,873	\$ 1,873	\$ -	\$ -
		\$ 22,431	\$ 22,627	\$ 0	\$ 0

**Line 6a** Net gain or (loss) from sale of assets  
**Line 7** Capital gain net income

**STATEMENT 003**

Includes a cost basis adjustment affecting long-term gains - for assets acquired by purchase - in the amount of \$352.33 due to wash sale disallowance

**STATEMENT 106**

<b>Line 11</b>	Other Income	Revenue & Expenses Per Books	Net Investment Income	Adjusted Net Income	Charitable Purposes
<u>Description</u>					
1	Excise Tax Refund with Interest	\$ 510	\$ 10	\$ 0	\$ 0

**STATEMENT 109**

<b>Line 16c</b>	Other Professional Fees	Revenue & Expenses Per Books	Net Investment Income	Adjusted Net Income	Charitable Purposes
<u>Description</u>					
1	Foundation Services LLC - 2018	\$ 5,000	\$ 1,000		\$ 4,000
2	Foundation Services LLC - 2019	\$ 5,000	\$ 1,000		\$ 4,000
		\$ 10,000	\$ 2,000	\$ 0	\$ 8,000

**Part I** Attachment to Part I Analysis of Revenues and Expenses *Continued...*

**STATEMENT 004**

Line 17 Interest		Revenue	Net Investment	Adjusted	Charitable
		& Expenses	Income	Net Income	Purposes
Description		Per Books			
1	Margin Interest Expense	\$ 11	\$ 11	\$ 0	\$ 0

**STATEMENT 110**

Line 18 Taxes		Revenue	Net Investment	Adjusted	Charitable
		& Expenses	Income	Net Income	Purposes
Description		Per Books			
1	2019 Estimated Excise Tax	\$ 2,500	\$ -	\$ -	\$ -
2	Foreign Taxes Withheld	\$ 602	\$ 602	\$ -	\$ -
		\$ 3,102	\$ 602	\$ 0	\$ 0

**STATEMENT 116**

**Part III** Attachment to Part III - Analysis of Changes in Net Assets or Fund Balances

Line 5 Other Decreases		Change in	
		Net Assets	
	Rounding Adjustment	\$	1
Contribution from Schedule B		FMV	Cost
	200 shares Boeing Co common stock	\$ 70,218	\$ 4,005
			\$ 66,213
<b>Total Decreases</b>			<b>\$ 66,214</b>

**STATEMENT 114**

**Part VIIA** Attachment to Part VII-A - Statements Regarding Activities

**Line 10** Substantial Contributors

GEOFFREY & BETSY PARKINSON  
 c/o GREENWICH ADVISORY ASSOCIATES  
 94 PERKINS ROAD  
 GREENWICH, CT 06830