Form 990-PF Department of the Treasury Internal Revenue Service

SCANNED MAY 07 2021

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.

| | For | caler | ndar year 2019 or tax year | r beginning | | , and ending | | |
|-------------------|------------|----------------------|---|--------------------------------------|---------------------------------------|---------------------------|---|---|
| | Na | me o | f foundation | | | | A Employer identification | number |
| | | | | | UNDATION, INC | _ | 0.5 54.000.54 | |
| | | | | WILLIAMS FO | 06-6107864 | | | |
| | | | • | f mail is not delivered to street a | odress) | Room/suite | B Telephone number 203-661-30 | 01 |
| | | | HARTCH, P.C | | actal anda | <u></u> | | |
| | | | ENWICH, CT | untry, and ZIP or foreign p 06836 | osiai code | | C If exemption application is pe | ending, check here |
| | | | all that apply: | Initial return | Initial return of a fo | ormer public charity | D 1. Foreign organizations | check here |
| | u (| JIICUI | Can that apply. | Final return | Amended return | ormer public charity | 1. Toroign organizations | s, check here |
| | | | | Address change | Name change | | Foreign organizations me check here and attach co. | eting the 85% test, |
| | H (| Check | type of organization | X Section 501(c)(3) ex | empt private foundation | 64 | E If private foundation sta | · — |
| | | Se | ction 4947(a)(1) nonexem | pt charitable trust | Other taxable private founda | ition 07 | under section 507(b)(1) | _ |
| | l Fa | air ma | arket value of all assets at | ´ I — | - | Accrual | F If the foundation is in a | 60-month termination |
| | | | Part II, col. (c), line 16) | | ther (specify) | | under section 507(b)(1) | (B), check here |
| | | \$ | | | nn (d), must be on cash bas | IS.) | | 1.0 |
| | Pa | art I | Analysis of Revenue an (The total of amounts in colu | mns (b), (c), and (d) may not | (a) Revenue and expenses per books | (b) Net investment income | (c) Adjusted net income | (d) Disbursements for charitable purposes |
| | | T 4 | necessarily equal the amoun | | expenses per seeks | 111001110 | N/A | (cash basis only) |
| 2 | | | Contributions, gifts, gran | | | | N/A | |
| - 7 | | 3 | Interest on savings and tempo | | | | | |
| ٩ | | 4 | Dividends and interest fro | om securities | 5,940. | 5,940. | | STATEMENT 1 |
| 6 | | 5a | Gross rents | | | | | |
| Ö | | b | Net rental income or (loss) | | - | ı | | |
| | d) | 6a | Net gain or (loss) from sale of | | 199. | | | |
| Z | Revenue | b | Gross sales price for all assets on line 6a | 199. | <u>-</u> | 100 | | |
| 円 | | 7 | Capital gain net income (from | | | 199. | | |
| Z | | ^ | Net short-term capital ga | ın | | | | |
| CANNED MAY | | 9 | Income modifications Gross sales less returns | İ | <u></u> | | | |
| 0 | | | and allowances Less Cost of goods sold | | <u> </u> | | | |
| 07 | | | Gross profit or (loss) | | | | | _ |
| 2021 | | 11 | Other income | | | | | _ |
|)21 | | 12 | Total. Add lines 1 throug | h 11 | 6,139. | 6,139. | | |
| | | 13 | Compensation of officers, dire | ectors, trustees, etc | 0. | 0. | | 0. |
| | | 14 | Other employee salaries a | and wages | | | | |
| | | | Pension plans, employee | | 1 000 | 100 | | 1 700 |
| | enses | 16a | Legal fees | STMT 2 | 1,800. | 100. | | 1,700. |
| 2 | | | Accounting fees Other professional fees | | | | | |
| 4 2 | e Exp | | Interest | | | | DEGENTED | |
| JAN 0 4 202 | rative | 18 | Taxes | STMT 3 | 300. | 0 - | RECEIVED | 0. |
| Z | nistra | 19 | Depreciation and depletion | | | | 14 | 18 |
| ~ | E | 20 | Occupancy | | | 00025 | NUV 2 3) 2020 | 10 |
| CE | Ad | 21 | Travel, conferences, and | meetings | | | | 78 |
| D B | and | 22 | Printing and publications | | | | OGDEN, UT | |
| 55 Batching Ogden | ğ | 22 23 24 25 | Other expenses | | | | 3 3 3 3 4 4 5 1 | |
| e de la company | rat | 24 | Total operating and adm | | 2 100 | 100. | | 1 700 |
| α ω | ő | 0.5 | expenses. Add lines 13 t Contributions, gifts, grant | - | 2,100. 12,800. | 100. | | 1,700. 12,800. |
| വ് | | | Total expenses and disb | | 12,000. | | | 12,000: |
| | | 20 | Add lines 24 and 25 | ursements. | 14,900. | 100. | | 14,500. |
| | | 27 | Subtract line 26 from line | : 12 | | | | I |
| | | | Excess of revenue over expen- | | <8,761.> | | | |
| | | b | Net investment income (| if negative, enter -0-) | | 6,039. | | |
| | | С | Adjusted net income (if n | | | | N/A | |
| | 9235 | 01 12 | -17-19 LHA For Paper | work Reduction Act Notice | e, see instructions | • | | Form 990-PF (2019) |

923501 12-17-19 LHA For Paperwork Reduction Act Notice, see instructions

2019.05000 VIANDA PLAYTER WILLIAMS F 146005

923521 12-17-19

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|---|--|--------------|-------------|-------------------|
| Part VI Excise Tax Based on Investment Income (Section 49 | | 948 - see II | nstruct | lions) |
| 1a Exempt operating foundations described in section 4940(d)(2), check here an | | | | |
| Date of ruling or determination letter (attach copy of letter if | | | | |
| b Domestic foundations that meet the section 4940(e) requirements in Part V, check here | ▶ | 1 | | 121. |
| of Part I, line 27b | | | | |
| c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter | | | | |
| 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 | | 121. |
| 4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only | ; others, enter -0-) | 4 | | $\frac{0.}{121.}$ |
| 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- | | 5 | | <u> </u> |
| 6 Credits/Payments | 6a 203. | | | |
| a 2019 estimated tax payments and 2018 overpayment credited to 2019 | | | ···· | |
| b Exempt foreign organizations - tax withheld at source | 6b 0. | 1 | | } |
| c Tax paid with application for extension of time to file (Form 8868) | | ┨ | | i |
| d Backup withholding erroneously withheld | [6d] U. | | | 403. |
| 7 Total credits and payments. Add lines 6a through 6d | attached | 8 | | 0. |
| 8 Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is a 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed | Macrieu | 9 | | |
| 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid | | 10 | | 282. |
| 11 Enter the amount of line 10 to be Credited to 2020 estimated tax | 282. Refunded | 11 | | 0. |
| Part VII-A Statements Regarding Activities | 202 Treidinged | | | |
| 1a During the tax year, did the foundation attempt to influence any national, state, or local le | oislation or did it participate or interveni | : in | T - T | Yes No |
| any political campaign? | g.o.a.o. | , | 1a | X |
| b Did it spend more than \$100 during the year (either directly or indirectly) for political pur | poses? See the instructions for the defi | nition | 1b | x |
| If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copie | | | | |
| distributed by the foundation in connection with the activities. | , | | 1. 1 | 1. 1 |
| c Did the foundation file Form 1120-POL for this year? | | | 1c | <u> </u> |
| 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 manag | ers. ▶ \$0 . | _ | | 1. 1 |
| e Enter the reimbursement (if any) paid by the foundation during the year for political exper | nditure tax imposed on foundation | | | |
| managers \triangleright \$0. | | | | |
| 2 Has the foundation engaged in any activities that have not previously been reported to the | e IRS? | | 2 | X |
| If "Yes," attach a detailed description of the activities. | | | | |
| 3 Has the foundation made any changes, not previously reported to the IRS, in its governing | g instrument, articles of incorporation, o | r | | |
| bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes | | | 3 | <u> </u> |
| 4a Did the foundation have unrelated business gross income of \$1,000 or more during the y | ear? | | 4a | X |
| b If "Yes," has it filed a tax return on Form 990-T for this year? | | N/A | 4b | _ |
| 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year | ar, | | 5 | X, |
| If "Yes," attach the statement required by General Instruction T | | | | 1 1 |
| 6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied | either: | | | 1 [|
| By language in the governing instrument, or | | . 1 | | 1 1 |
| By state legislation that effectively amends the governing instrument so that no mandal | fory directions that conflict with the stat | e iaw | - | <u></u> |
| remain in the governing instrument? | maleta Doubli and (a) and Doub \\ | | 7 | X |
| 7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," coil | inplete Part II, col. (c), and Part XV | | +++ | ^ |
| 8a Enter the states to which the foundation reports or with which it is registered. See instruc | utuons . | | | |
| CT | diolis. | | | |
| b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the | Attorney General (or decignate) | | | |
| of each state as required by General Instruction G2 If "No," attach explanation | Actionists delicial (of designate) | | 8b - | ${\mathbf{x}}$ |
| 9 Is the foundation claiming status as a private operating foundation within the meaning of | section 4942(i)(3) or 4942(i)(5) for cale | ndar | " | |
| year 2019 or the tax year beginning in 2019? See the instructions for Part XIV. If "Yes," or | | | 9 | — x |
| 10 Did any persons become substantial contributors during the tax year? if "Yes," attach a schi | | | 10 | <u> </u> |
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| Pa | art 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 | | <u> </u> |
| 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 ► N/A | | | |
| 14 | The books are in care of ▶ THOMAS F. HARTCH Telephone no. ▶ 203-66 | | | |
| | Located at ►PO BOX 676, GREENWICH, CT ZIP+4 ►06 | <u>836</u> | <u>-06</u> | <u>76</u> |
| 15 | Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here | | | |
| | and enter the amount of tax-exempt interest received or accrued during the year | N | /A | |
| 16 | At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority over a bank, | | Yes | No |
| | securities, or other financial account in a foreign country? | 16 | | <u>X</u> |
| | See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the | | | |
| _ | foreign country | | | |
| Pa | art 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. | <u> </u> | Yes | No |
| 1a | During the year, did the foundation (either directly or indirectly): | | i | |
| | (1) Engage in the sale or exchange, or leasing of property with a disqualified person? | | | ľ |
| | (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) | | | |
| | a disqualified person? | | | l |
| | (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes X No Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes X 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 X 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.) | | | ļ |
| | of fany 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 | | | |
| | Organizations relying on a current notice regarding disaster assistance, check here | | | |
| c | E Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected | | | ł |
| · | before the first day of the tax year beginning in 2019? | 1c | | X |
| 2 | Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation | | | |
| _ | defined in section 4942(j)(3) or 4942(j)(5)): | | | İ |
| а | 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? | | | } |
| | If "Yes," list the years | | | ٠ |
| 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.) 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 | | | 1 |
| | > | | | |
| 3a | Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time | | | |
| | during the year? | | | |
| b | olf "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 | | |
| | Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? | 4a | | <u> </u> |
| 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 | | <u>X</u> |

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|--|--|-----------------------------------|--|-------------------|--|
| Part VII-B Statements Regarding Activities for Which F | form 4720 May Be Re | equired (contin | ued) | | |
| 5a 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 | n 4945(e))? | Y | es X No | · · | Ti |
| (2) Influence the outcome of any specific public election (see section 4955); of | or to carry on, directly or indire | ctly, | | | |
| any voter registration drive? | | | es X No | | 1 1 |
| (3) Provide a grant to an individual for travel, study, or other similar purposes | · · | | es X No | - 1 | 1 1 |
| (4) Provide a grant to an organization other than a charitable, etc., organization | | | | - 1 | 1 1 |
| 4945(d)(4)(A)? See instructions | | | es X No | | 1 1 |
| (5) Provide for any purpose other than religious, charitable, scientific, literary, | or educational nurnoses, or fo | | | | 1 1 |
| the prevention of cruelty to children or animals? | or oddounonal purposso, or re | | es X No | | |
| b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify un | der the exceptions described in | · | | | 1 1 |
| section 53.4945 or in a current notice regarding disaster assistance? See instri | • | · | N/A | 5b | |
| Organizations relying on a current notice regarding disaster assistance. See institutions relying on a current notice regarding disaster assistance, check l | | | | - | † |
| c If the answer is "Yes" to question 5a(4), does the foundation claim exemption fi | | nad | - J- | | · |
| | | | | | 1 1 |
| expenditure responsibility for the grant? | 14 | /A Y | es L 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 | | Г о л | | |
| a personal benefit contract? | | , L Y | es X No _ | | |
| b Did the foundation, during the year, pay premiums, directly or indirectly, on a p | personal benefit contract? | | | 6b | X. |
| If "Yes" to 6b, file Form 8870. | | | | | |
| 7a At any time during the tax year, was the foundation a party to a prohibited tax s | | Ye | es X No | | 4 |
| b If "Yes," did the foundation receive any proceeds or have any net income attribu | | | N/A | 7b | |
| 8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$ | S1,000,000 in remuneration or | | | - | 1 1 |
| excess parachute payment(s) during the year? | | | s X No | | |
| Part VIII Information About Officers, Directors, Truste | ees, Foundation Man | agers, Highly | | | |
| Paid Employees, and Contractors | | | | | |
| List all officers, directors, trustees, and foundation managers and the | T | | [/d\ | _ | |
| (-) Name and address | (b) Title, and average hours per week devoted | (c) Compensation (If not paid, | (d) Contributions to employee benefit plans | (e) Ex | pense other |
| (a) Name and address | to position | enter -0-) | and deferred compensation | allowa | ances |
| THOMAS F. HARTCH | PRES., TREASU | RER | | | |
| | | | | | |
| GREENWICH, CT | 0.00 | 0. | 0. | | 0. |
| GALE B. HARTCH | SECRETARY., D | IRECTOR | | | |
| | | | | | |
| GREENWICH, CT | 0.00 | 0. | 0. | | 0. |
| TIMOTHY E. HARTCH | VP, DIRECTOR | | | | |
| | 1 | | | | |
| GREENWICH, CT | 0.00 | 0. | 0. | | 0. |
| · · · · · · · · · · · · · · · · · · · | | | | | |
| | 1 | | | | |
| | 1 | | | | |
| Compensation of five highest-paid employees (other than those inc | luded on line 1). If none, e | nter "NONE." | | | |
| | (b) Title, and average | | (d) Contributions to employee benefit plans | (e) Ex | pense |
| (a) Name and address of each employee paid more than \$50,000 | hours per week devoted to position | (c) Compensation | and deferred compensation | account allowa | t, other ances |
| NONE | devoted to position | - | compensation | - 4110111 | |
| ионь | 1 | | | | |
| | · · · · · · · · · · · · · · · · · · · | | • | <u> </u> | |
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| | - | | | | |
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| | | | | | |
| | | | | ! | |
| | | | | | |
| Fotal number of other employees paid over \$50,000 | | | <u> </u> | | 0 |
| | | | Form | 990-PF | (2019) |

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|--|---------------------|---------------------------|
| Part VIII Information About Officers, Directors, Trustees, Foundation Management Paid Employees, and Contractors (continued) | gers, Highly | |
| 3 Five highest-paid independent contractors for professional services. If none, enter "NONE." | | |
| (a) Name and address of each person paid more than \$50,000 | (b) Type of service | (c) Compensation |
| NONE | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| Total number of others receiving over \$50,000 for professional services | ······ | ▶ 0 |
| Part IX-A Summary of Direct Charitable Activities | | |
| List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information number of organizations and other beneficiaries served, conferences convened, research papers produced, etc. | n such as the | Expenses |
| 1 N/A | | |
| | | |
| | · | |
| 2 | | |
| | | |
| | | |
| 3 | | |
| | | |
| | | |
| 4 | | |
| | | |
| Dort IV B Common of December Deleted Investments | | |
| Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2. | | Amount |
| 37/3 | | Amount |
| 1 N/A | | |
| | | |
| 2 | | |
| | | |
| | | |
| All other program-related investments. See instructions. | | |
| 3 | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| Total. Add lines 1 through 3 | > | 0. |
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| ĮP, | art∤X■ Minimum Investment Return (All domestic foundations must complete this part. Foreign fou | ndations, se | e instructions) |
|-----|--|------------------|------------------|
| 1 | Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes. | | |
| а | Average monthly fair market value of securities | 1a | 270,688. |
| b | Average of monthly cash balances | 1b | 6,554. |
| C | Fair market value of all other assets | 1c | |
| d | Total (add lines 1a, b, and c) | 1d | 277,242. |
| е | Reduction claimed for blockage or other factors reported on lines 1a and | | |
| | 1c (attach detailed explanation) | | |
| 2 | Acquisition indebtedness applicable to line 1 assets | 2 | 0. |
| 3 | Subtract line 2 from line 1d | 3 | 277,242. |
| 4 | Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions) | 4 | 4,159. |
| 5 | Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 | 5 | 273,083. |
| 6 | Minimum investment return. Enter 5% of line 5 | 6 | 13,654. |
| IP. | art{XII Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations a | nd certain | |
| | foreign organizations, check here 🕨 🔃 and do not complete this part.) | | |
| 1 | Minimum investment return from Part X, line 6 | 1 | 13,654. |
| 2a | Tax on investment income for 2019 from Part VI, line 5 | | |
| b | Income tax for 2019. (This does not include the tax from Part VI) | | |
| C | Add lines 2a and 2b | 2¢ | 121. |
| 3 | Distributable amount before adjustments. Subtract line 2c from line 1 | 3 | 13,533. |
| 4 | Recoveries of amounts treated as qualifying distributions | 4 | 0. |
| 5 | Add lines 3 and 4 | 5 | 13,533. |
| 6 | Deduction from distributable amount (see instructions) | 6 | 0. |
| 7_ | Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 | 7 | 13,533. |
| œ. | art;XIII Qualifying Distributions (see instructions) | | |
| 1 | Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes: | | |
| а | Expenses, contributions, gifts, etc total from Part I, column (d), line 26 | 1a | 14,500. |
| b | Program-related investments - total from Part IX-B | 1b | 0. |
| 2 | Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes | 2 | |
| 3 | Amounts set aside for specific charitable projects that satisfy the: | | |
| а | Suitability test (prior IRS approval required) | 3a | |
| b | Cash distribution test (attach the required schedule) | 3b | |
| 4 | Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8; and Part XIII, line 4 | 4 | 14,500. |
| 5 | Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment | | |
| | income. Enter 1% of Part I, line 27b | 5 | 0. |
| 6 | Adjusted qualifying distributions. Subtract line 5 from line 4 | 6 | 14,500. |
| | Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation (4940(e) reduction of tax in those years. | qualifies for th | ie section |

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Part XIII Undistributed Income (see instructions) (b) (c) (d) Corpus Years prior to 2018 2018 2019 1 Distributable amount for 2019 from Part XI, 13,533. line 7 2 Undistributed income, if any, as of the end of 2019 0. a Enter amount for 2018 only b Total for prior years: 0. 3 Excess distributions carryover, if any, to 2019: 2,591. a From 2014 1,455. **b** From 2015 10,202. c From 2016 10,864. d From 2017 3,768. e From 2018 28,880 f Total of lines 3a through e 4 Qualifying distributions for 2019 from 14,500. Part XII, line 4: ► \$ 0 a Applied to 2018, but not more than line 2a b Applied to undistributed income of prior 0 years (Election required - see instructions) c Treated as distributions out of corpus 0. (Election required - see instructions) 13,533. d Applied to 2019 distributable amount 967. e Remaining amount distributed out of corpus Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount 0. 0. must be shown in column (a)) 6 Enter the net total of each column as indicated below: 29,847. a Corpus Add lines 3f, 4c, and 4e Subtract line 5 b Prior years' undistributed income Subtract 0. 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 0. assessed d Subtract line 6c from line 6b. Taxable 0. amount - see instructions e Undistributed income for 2018. Subtract line 0 4a from line 2a. Taxable amount - see instr f Undistributed income for 2019, Subtract lines 4d and 5 from line 1. This amount must 0. be distributed in 2020 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election 0. may be required - see instructions) 8 Excess distributions carryover from 2014 2,591. not applied on line 5 or line 7 9 Excess distributions carryover to 2020. 27,256. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9: 1,455. a Excess from 2015 10,202. b Excess from 2016 10,864. c Excess from 2017 3,768. d Excess from 2018

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e Excess from 2019

Form 990-PF (2019)

967.

| | | LIAMS FOUND | | 06-61 | 07864 Page 10 |
|--|---|------------------------------|-----------------------------|------------------------------|---------------------------------------|
| Part XIV Private Operating F | -oundations (see in | nstructions and Part VI | -A, question 9) | N/A | |
| 1 a If the foundation has received a ruling | | • • | | | |
| foundation, and the ruling is effective f | | - | ▶ ∟ | | |
| b Check box to indicate whether the four | | ing foundation described i | | 4942(j)(3) or49 | 42(1)(5) |
| 2 a Enter the lesser of the adjusted net | Tax year | /5) 2010 | Prior 3 years | (d) 2016 | í (a) Tatal |
| income from Part I or the minimum | (a) 2019 | (b) 2018 | (c) 2017 | (0) 2016 | (e) Total |
| investment return from Part X for | | | | | |
| each year listed | | | - | | |
| b 85% of line 2a | | + | | | |
| c Qualifying distributions from Part XII, | | | | | I |
| line 4, for each year listed d Amounts included in line 2c not | | | | | |
| used directly for active conduct of | | | | | |
| exempt activities | | | | | |
| e Qualifying distributions made directly | | | | | - |
| for active conduct of exempt activities. | | | | | |
| Subtract line 2d from line 2c | | | | | |
| 3 Complete 3a, b, or c for the | | | | | |
| alternative test relied upon a "Assets" alternative test - enter; | | | | | |
| (1) Value of all assets | | | | | |
| (2) Value of assets qualifying | | | | | |
| under section 4942(j)(3)(B)(i) | | 1 | | | |
| b "Endowment" alternative test - enter | | _ | | | · · · · · · · · · · · · · · · · · · · |
| 2/3 of minimum investment return shown in Part X, line 6, for each year | | | | | 1 |
| listed | | | L | | |
| c "Support" alternative test - enter: | | | | | 1 |
| (1) Total support other than gross | | | | | 1 |
| investment income (interest, dividends, rents, payments on | | | | | 1 |
| securities loans (section | | | | | 1 |
| 512(a)(5)), or royalties) | | | 1 | | |
| (2) Support from general public | | | | | 1 |
| and 5 or more exempt organizations as provided in | | | | | 1 |
| section 4942(j)(3)(B)(III) | | | | | |
| (3) Largest amount of support from | | | | | ı |
| an exempt organization | | | | | |
| Part XV Supplementary Info | rmetion (Comple | to this port only i | the foundation | had \$5 000 ar mar | o in coooto |
| Part XV Supplementary Info | | | i the foundation | nad \$5,000 or mor | e in assets |
| | | uctions. _j | | | |
| 1 Information Regarding Foundation | | Ab 00/ - 6 Ab - 4 - 4 - 1 | | f | |
| a List any managers of the foundation will year (but only if they have contributed) | | | ibutions received by the | touridation before the close | or any tax |
| NONE | ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,, | | | | |
| b List any managers of the foundation wi | ho own 10% or more of th | a ctack of a corporation (| or an equally large porto | on of the ownership of a pa | rtnerchin or |
| other entity) of which the foundation ha | | | or an equally large portion | on of the ownership of a par | the stilp of |
| NONE | • | | | | |
| 2 Information Regarding Contribut | tion, Grant, Gift, Loan | . Scholarship, etc., Pro | ngrams: | | |
| Check here ► X if the foundation | | | | ot accept unsolicited reque | sts for funds. If |
| the foundation makes gifts, grants, etc. | | | | | |
| a The name, address, and telephone num | nber or email address of the | he person to whom applic | ations should be address | sed: | |
| , , , , | | | | | |
| | | | | | |
| b The form in which applications should | be submitted and informa | ation and materials they sh | ould include | | |
| · | | | | | |
| c Any submission deadlines | | | | | |
| | | | | | |
| d Any restrictions or limitations on award | is, such as by geographic | al areas, charitable fields, | kınds of institutions, or o | other factors: | |

| Part XV Supplementary Information | (continued) | , | | |
|---|--|----------------------|----------------------------------|--------------------------|
| 3 Grants and Contributions Paid During the Ye | ar or Approved for Future F | Payment | | |
| Recipient | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of | Purpose of grant or contribution | Amount |
| Name and address (home or business) | or substantial contributor | recipient | Contribution | |
| a Paid during the year | | | | |
| | | | | |
| | | | | |
| SEE ATTACHED SCHEDULE | | | | |
| SEE ATTACHED SCHEDULE | | | | 12,800. |
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| | <u> </u> | | | |
| Total | Γ | Τ | <u> </u> | 12,800. |
| b Approved for future payment | | | | |
| | | | | |
| NONE | | | | |
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| Total | <u>.</u> | | ▶ 3b | orm 990-PF (2019) |
| 002611 10 17 10 | | | Г | (2019) ا ا 200 اااان |

| Part XVI-A | Analysis | of Incom | e-Producina | Activities |
|------------|----------|----------|-------------|------------|
| | | | | |

| | 1 11. 11. 1 | | т | | |
|---|--|----------------------------------|--|--|---|
| Enter gross amounts unless otherwise indicated. | (a) Business | business income (b) Amount | (C) Exclu- sion | ded by section 512, 513, or 514 (d) Amount | (e) Related or exempt function income |
| 1 Program service revenue. | code | Amount | code | Amount | Tunction income |
| a | - | | + | | |
| b | | | | | |
| c | | | | | |
| d | | | | | |
| e | · | | + | | |
| f | - | | | | |
| g Fees and contracts from government agencies | <u> </u> | | | | |
| 2 Membership dues and assessments | | | | | |
| 3 Interest on savings and temporary cash | | | | | |
| investments | | | 14 | 5,940. | |
| 4 Dividends and interest from securities | | | 1.4 | 3,340. | |
| 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 | | | \vdash | | |
| 7 Other investment income | ļ | | | | |
| 8 Gain or (loss) from sales of assets other | | | 14 | 199. | |
| than inventory | | | 14 | 199. | |
| 9 Net income or (loss) from special events | - | | | | |
| 10 Gross profit or (loss) from sales of inventory | | | | | |
| 11 Other revenue. | | | | | |
| a | · | | | | |
| b | · | | | | |
| c | | | \vdash | | · |
| d | · - | | \vdash | | |
| 6 | · | 0. | | 6 130 | 0. |
| 12 Subtotal. Add columns (b), (d), and (e) | | | | 6,139. 13_ | 6,139. |
| 13 Total. Add line 12, columns (b), (d), and (e) | | | | 13 | 0,133. |
| (See worksheet in line 13 instructions to verify calculations.) | | | | | |
| Part XVI-B Relationship of Activities t | to the Accom | plishment of Ex | empt | Purposes | |
| Explain below how each activity for which income the foundation's exempt purposes (other than | | | contrib | uted importantly to the accom | plishment of |
| | by providing funds | ioi sucii purposes). | | | |
| N/A | | | | | |
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Form 990-PF (2019) VIANDA PLAYTER WILLIAMS FOUNDATION, INC. 06-6107864

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

| Did the | e organization directly or indi | rectly engage in any | of the followin | ig with any other organizatio | on described in sec | ction 501(c) | | es No |
|-----------------------------|---|---------------------------|-------------------|------------------------------------|--|------------------------------------|------------------------------------|---------------|
| (other | than section 501(c)(3) organ | nzations) or in sectio | n 527, relating | to political organizations? | | | | |
| a Transf | ers from the reporting founda | ation to a noncharital | ble exempt org | ganization of: | | | | |
| (1) Ca | | | , , | | | | 1a(1) | X |
| | ther assets | | | | | | 1a(2) | Х |
| , , | transactions: | | | | | | | |
| | ales of assets to a noncharital | ble exempt organizat | ากก | | | | 1b(1) | X |
| ٠, | urchases of assets from a noi | | | | | | 1b(2) | X |
| | ental of facilities, equipment, | • | r garnzation | | | | 1b(3) | X |
| | eimbursement arrangements | | | | | | 1b(4) | <u> </u> |
| • • | oans or loan guarantees | | | | | | 16(5) | X |
| | erformance of services or me | mbarahin ar fundrair | sina caliaitatia | no | | | 1b(6) | X |
| ٠, | | • | • | | | | 10(0) | $\frac{x}{x}$ |
| | g of facilities, equipment, ma | | | • | waya ahaw tha fair | market value of the acada | | |
| | inswer to any of the above is | | | | | | | 5, |
| | vices given by the reporting for | | | eo iess man fair market valui | e in any transactio | on or sharing arrangement, | Snow in | |
| | n (d) the value of the goods, | | | avamet arganization | 1400 | | | |
| (a) Line no | (b) Amount involved | (c) Name of | | exempt organization | (u) Description | on of transfers, transactions, and | snaring arrang | jements |
| _ | | | N/A | | | | | |
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| 2a Is the f | foundation directly or indirect | tly affiliated with, or r | elated to, one | or more tax-exempt organiz | ations described | | | |
| | ion 501(c) (other than section | | | | | [| Yes | X No |
| b If "Yes, | " complete the following sch | edule. | | | | | | |
| | (a) Name of org | | | (b) Type of organization | | (c) Description of relation | ship | |
| | N/A | | | | | | | |
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| | 1 | | | | | · ·- | | |
| Un | nder penalties of perjury, I declare to | hat I have examined this | return, including | accompanying schedules and sta | itements, and to the b | pest of my knowledge | | |
| Sign and | d belief, it is true, correct, and com | plete Declaration of prep | parer (other than | taxpayer) is based on all informat | on of which preparer | nas any knowledge | ay the IRS disc turn with the p | reparer |
| Here | J Male | B. Hart | t le | 111/11/20 | SECRE | | own below? S | |
| 1 | Signature of officer or trustee | , , , | <u> </u> | Daté | Title | | 11 163 | ∟ No |
| | Print/Type preparer's na | | Preparer's si | | Date | Check If PTIN | | |
| | T THIOTYPO PROPARCITS HA | 1110 | 1 10000101 3 31 | ار زر مر | 1 | self- employed | | |
| Paid | THOMAS F H | አ ውጥ <i>ር</i> ፔ | 1 | . + 11-1-1 | / 11/09/20 | 1 | | |
| Prepare | | | ייים פול ער ער | TT & MORGAN I | | Firm's EIN ► 26-1 | 13202 | 2 |
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| 330 OIII | * | O MECH DI | MATARE 31 | TE OND ET OOF | | | | |
| | Firm's address ► 50 | | | | • | | 60 04 | EΛ |
| | j GR | EENWICH, | CT 068. | 3 U | | | 62-24 | |
| | | | | | | ; | orm 990- | PF (2019) |

| FORM 990-PF | DIVIDENDS | AND INT | EREST | FROM SECUR | ITIES S | TATEMENT 1 |
|--|-----------|------------------------------|-------|-------------------------------|-------------------------------|-------------------------------|
| GROSS SOURCE AMOUNT | | CAPITAL GAINS DIVIDENI | | (A) REVENUE PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME |
| FIDELITY | 6,139. | | 199. | 5,940. | 5,940. | |
| TO PART I, LINE 4 | 6,139. | | 199. | 5,940. | 5,940. | |
| | | T 70 | 3. EE | | | ma mentenam - 2 |
| FORM 990-PF | | JiriCi | AL FE | | S | TATEMENT 2 |
| DESCRIPTION | | (A) EXPENSES PER BOOK | | (B) T INVEST- NT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
| LEGAL FEES | | 1,800. | | 100. | | 1,700. |
| TO FM 990-PF, PG 1, | LN 16A = | 1,800. 100. | | | 1,700. | |
| FORM 990-PF | | | AXES | | , Q1 | TATEMENT 3 |
| —————————————————————————————————————— | | | HALLO | | | TATEMENT 5 |
| DESCRIPTION | | (A) EXPENSES PER BOOK | | (B) T INVEST- NT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
| CT SOS FEDERAL EXCISE TAX | | 10 20 | | 0. | | 0. |
| TO FORM 990-PF, PG 1, LN 18 | | 300. | | 0. | | 0. |
| | | | | | | |

| FORM 990-PF CORPORATE STOCK | | STATEMENT 4 | |
|---|------------|----------------------|--|
| DESCRIPTION | BOOK VALUE | FAIR MARKET VALUE | |
| FIDELITY INVESTMENT FUNDS | 248,688. | 285,931. | |
| TOTAL TO FORM 990-PF, PART II, LINE 10B | 248,688. | 285,931. | |

The Vianda Playter Williams Foundation, Inc.

06-6107864, Form 990 PF (2019)

| Name and Address Adam J. Lewis Academy Bridgeport, CT | <u>Status</u> Public | Purpose of Organization General – Education | Amount 100. |
|--|-------------------------|--|----------------|
| Adopt-A-Dog Greenwich, CT | Public | General – Animal Welfare | 100. |
| Advocates International Washington, D. C. | Public | General - Legal | 100. |
| Alliance Defending Freedom Scottsdale, AZ | Public | General – Legal | 100. |
| American Red Cross Greenwich, CT | Public | General - Medical | 100. |
| Boys & Girls Club of Greenwich Greenwich, CT | Public | General – Youth Sports & Crafts | 200. |
| Brunswick School Greenwich, CT | Public | General – School | 400. |
| CATO Washington, DC | Public | General – Policy | 100. |
| Christian Advocates Serving Evangelism Atlanta, GA | Public | General – Policy | 100. |
| Christian Legal Society Springfield, VA | Public | General – Religious Freedom | 1,300. |
| Christian Union Princeton, NJ | Public | General – Religion | 100. |
| Claire Booth Luce Policy Institute Herndon, VA | Public | General – Policy | 100. |
| Concerned Women for America Washington, DC | Public | General – Policy | 200. |

| • • | | | | |
|-------|--|--------|-------------------------|--------|
| | Family Institute of Connecticut Hartford, CT | Public | General – Family | 1,200. |
| | Family ReEntry Norwalk, CT | Public | General – Family | 100. |
| | Father Flanagan's Boys Town Boys Town, NE | Public | General - Youth | 100. |
| | First Liberty Institute Pueblo, CO | Public | General – Policy | 100. |
| | FOCUS New Canaan, CT | Public | General – Humanitarian | 1,000. |
| ' | Focus on the Family Colorado Springs, CO | Public | General – Family | 100. |
| | Foundation for Individual Rights in Education Washington, DC | Public | General – Policy | 100. |
| | Freedom Works Foundation Washington, DC | Public | General – Policy | 100. |
| I | Greenwich Library Greenwich, CT | Public | General - Library | 100. |
| l | Greenwich Country Day School Greenwich, CT | Public | General – School | 100. |
| | Greenwich Emergency Medical Service Greenwich, CT | Public | General – Medical | 100. |
| | Greenwich Hospital Foundation Greenwich, CT | Public | General – Medical | 100. |
| | Heritage Foundation Washington, DC | Public | General – Policy | 100. |
| | Hospital for Special Surgery New York, NY | Public | General – Medical | 100. |
| | Housatonic Valley Association Cornwall, CT | Public | General – Environmental | 100. |

| Institute for Justice Arlington, VA | Public | General – Humanitarian | 100. |
|---|--------|--------------------------|------|
| International Rescue Committee New York, NY | Public | General – Humanitarian | 100. |
| Jubilee Campaign USA Fairfax, VA | Public | General – Humanitarian | 100. |
| Judicial Watch Washington, DC | Public | General – Policy | 300. |
| Leadership Institute Arlington, VA | Public | General – Policy | 100. |
| Lighthouse Guild New York, NY | Public | General – Medical | 100. |
| Liberty University Law School Lynchberg, VA | Public | General – Education | 100. |
| Little Guild of St. Francis West Cornwall, CT | Public | General – Animal Welfare | 100. |
| Media Research Center Washington, DC | Public | General - Press | 200. |
| National Legal & Policy Center Front Royal, VA | Public | General – Policy | 200. |
| National Organization for Marriage Educational Fund Springfield, VA | Public | General – Family | 100. |
| National Right to Work Legal Defense Foundation Springfield, VA | Public | General – Policy | 100. |
| Our Companions Bloomfield, CT | Public | General – Animal Welfare | 100. |
| Overseas Ministries Study Group New Haven CT | Public | General – Humanitarian | 100. |

| Pathways, Inc. Greenwich, CT | Public | General – Medical | 100. |
|--|--------|-------------------------|--------|
| Patrick Henry College Purcellville, VA | Public | General – College | 100. |
| Perkins Foundation Jackson, MS | Public | General – Humanitarian | 100. |
| Phi Gamma Delta Educational Foundation Lexington, KY | Public | General – Educational | 100. |
| Philips Academy Andover Andover, MA | Public | General – School | 500. |
| Pregnancy Health Center Richmond, KY | Public | General – Medical | 300. |
| Project Veritas Washington, DC | Public | General – Policy | 100. |
| Sacred Heart Greenwich Greenwich, CT | Public | General – School | 1,000. |
| Salvation Army Greenwich, CT | Public | General - Humanitarian | 100. |
| Smith College Northhampton, MA | Public | General – College | 500. |
| South Kent School South Kent, CT | Public | General – School | 300. |
| State Policy Network Arlington, VA | Public | General – Public Policy | 100. |
| Sudan Relief Fund Falls Church, VA | Public | General – Humanitarian | 100. |
| Thomas More Law Center Ann Arbor, MI | Public | General – Legal | 200. |
| JSO New York, NY | Public | General – Service | 100. |

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| Voice of the Martyrs Bartlesville, OK | Public | General – Humanitarian | 100. |
|--|--------|------------------------|--------------------------|
| William F. Buckley Program at Yale New Haven, CT | Public | General – Policy | 100. |
| Williams College Williamstown, MA | Public | General – College | 100. |
| Yale University New Haven, CT | Public | General – University | 400. |
| Yankee Institute for Public Policy Hartford, CT | Public | General – Policy | <u>100.</u> \$12,800. |

None of the above donees is related to the donor