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Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

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

1912

OMB No 1545-0047

2019

Open to Public Inspection

For calendar year 2019 or tax year beginning , and ending

Name of foundation
EAGAN FAMILY FOUNDATION, INC.
C/O MONARCH WEALTH & BUSINESS MGMT

Internal Revenue Service
Received US Bank - USB
534
NOV 16 2020
Ogden, UT

A Employer identification number
13-4085533

Number and street (or P O box number if mail is not delivered to street address) Room/suite
209 EAST 31ST STREET

B Telephone number
212-894-8100

City or town, state or province, country, and ZIP or foreign postal code
NEW YORK, NY 10016

C If exemption application is pending, check here ▶ ☐

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G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

D 1. Foreign organizations, check here ▶ ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

H Check type of organization: [X] Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

04

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶$ 7,326,716.

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

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

3/9

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))

		(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				
	2 Check ▶ [X] if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	13,683.	13,683.	13,683.	STATEMENT 1
	4 Dividends and interest from securities	134,353.	134,353.	134,353.	STATEMENT 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	224,716.			
	b Gross sales price for all assets on line 6a 1,418,411.				
	7 Capital gain net income (from Part IV, line 2)		224,716.		
	8 Net short-term capital gain			N/A	
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss)				
	11 Other income				
	12 **Total.** Add lines 1 through 11	372,752.	372,752.	148,036.	
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0.	0.	0.	0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees				
	c Other professional fees				
	17 Interest				
	18 Taxes STMT 3	1,817.	0.	0.	0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses STMT 4	53,317.	0.	0.	0.
	24 **Total operating and administrative expenses.** Add lines 13 through 23	55,134.	0.	0.	0.
	25 Contributions, gifts, grants paid	365,450.			365,450.
	26 **Total expenses and disbursements.** Add lines 24 and 25	420,584.	0.	0.	365,450.
	27 Subtract line 26 from line 12.				
	a Excess of revenue over expenses and disbursements	-47,832.			
	b **Net investment income** (if negative, enter -0-)		372,752.		
	c **Adjusted net income** (if negative, enter -0-)			148,036.	

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Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
Assets	1 Cash - non-interest-bearing	201,806.		61,538.
	2 Savings and temporary cash investments			
	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			
	7 Other notes and loans receivable ▶			
	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			
	b Investments - corporate stock			
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment: basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 6	5,955,826.	7,265,178.	7,265,178.
	14 Land, buildings, and equipment: basis ▶			
	Less accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 **Total assets** (to be completed by all filers - see the instructions. Also, see page 1, item I)	6,157,632.	7,265,178.	7,326,716.
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	23 **Total liabilities** (add lines 17 through 22)	0.	0.	
Net Assets or Fund Balances	**Foundations that follow FASB ASC 958, check here ▶ ☐ and complete lines 24, 25, 29, and 30.**			
	24 Net assets without donor restrictions			
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here ▶ ☒ and complete lines 26 through 30.			
	26 Capital stock, trust principal, or current funds	0.	0.	
	27 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	28 Retained earnings, accumulated income, endowment, or other funds	6,157,632.	7,326,715.	
	29 **Total net assets or fund balances**	6,157,632.	7,326,715.	
	30 **Total liabilities and net assets/fund balances**	6,157,632.	7,326,715.	

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	6,157,632.
2	Enter amount from Part I, line 27a	2	-47,832.
3	Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 5	3	5,503,796.
4	Add lines 1, 2, and 3	4	11,613,596.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29	6	11,613,596.

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	WF 4506	P	VARIOUS	12/31/19
b	WF 4506	P	VARIOUS	12/31/19
c	WF 9077	P	VARIOUS	12/31/19
d	WF 9077	P	VARIOUS	12/31/19
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))
a	151,866.		147,110.	4,756.
b	1,099,197.		881,698.	217,499.
c	165,201.		164,887.	314.
d	2,147.			2,147.
e				

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.

	(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a				4,756.
b				217,499.
c				314.
d				2,147.
e				

2 Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	224,716.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8		3	4,756.

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	340,540.	6,920,747.	.049206
2017	310,443.	6,668,642.	.046553
2016	254,356.	5,355,461.	.047495
2015	119,292.	1,372,338.	.086926
2014	118,319.	1,445,641.	.081845

2 **Total** of line 1, column (d)	2	.312025
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years	3	.062405
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	6,905,366.
5 Multiply line 4 by line 3	5	430,929.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	3,728.
7 Add lines 5 and 6	7	434,657.
8 Enter qualifying distributions from Part XII, line 4	8	365,450.

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

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

1a Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter: ______ (attach copy of letter if necessary-see instructions)		
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☐ and enter 1% of Part I, line 27b	1	7,455.
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	7,455.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	4	0.
5 **Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-	5	7,455.
6 Credits/Payments:		
a 2019 estimated tax payments and 2018 overpayment credited to 2019 — 6a: 0.		
b Exempt foreign organizations - tax withheld at source — 6b: 0.		
c Tax paid with application for extension of time to file (Form 8868) — 6c: 0.		
d Backup withholding erroneously withheld — 6d: 0.		
7 Total credits and payments. Add lines 6a through 6d	7	0.
8 Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	282.
9 **Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** SEE STATEMENT 7 ▶	9	7,737.
10 **Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	
11 Enter the amount of line 10 to be: **Credited to 2020 estimated tax** ▶ **Refunded** ▶	11	

Part VII-A Statements Regarding Activities

		Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b Did it spend more than $100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition	1b		X
If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c Did the foundation file **Form 1120-POL** for this year?	1c		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ $ 0. (2) On foundation managers. ▶ $ 0.			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ 0.			
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.	2		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		X
4a Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b If "Yes," has it filed a tax return on **Form 990-T** for this year? N/A	4b		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by *General Instruction T*	5		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X	
7 Did the foundation have at least $5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	7	X	
8a Enter the states to which the foundation reports or with which it is registered. See instructions. ▶ NONE			
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G*? If "No," attach explanation	8b	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2019 or the tax year beginning in 2019? See the instructions for Part XIV. If "Yes," complete Part XIV	9		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

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 ▶ N/A

14 The books are in care of ▶ MONARCH WEALTH & BUSINESS MANAGEMEN Telephone no. ▶ 212-894-8100
Located at ▶ 209 EAST 31ST STREET, NEW YORK, NY ZIP+4 ▶ 10016

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here ▶ ☐
and enter the amount of tax-exempt interest received or accrued during the year ▶ 15 N/A

			Yes	No
16	At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		X
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ▶			

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

				Yes	No
1a	During the year, did the foundation (either directly or indirectly):				
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	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		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):				
a	At the end of tax year 2019, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2019?	☐ Yes ☒ No			
	If "Yes," list the years ▶ ______, ______, ______, ______				
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. ▶ ______, ______, ______, ______				
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2019 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use 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		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2019?		4b		X

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

			Yes	No
5a During the year, did the foundation pay or incur any amount to:				
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes ☒ No			
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	☐ Yes ☒ No			
(3) Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes ☒ No			
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	☐ Yes ☒ No			
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes ☒ No			
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions	N/A	5b		
Organizations relying on a current notice regarding disaster assistance, check here	▶ ☐			
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? If "Yes," attach the statement required by Regulations section 53.4945-5(d).	N/A ☐ Yes ☐ No			
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes ☒ No			
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870.		6b		X
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes ☒ No			
b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	N/A	7b		
8 Is the foundation subject to the section 4960 tax on payment(s) of more than $1,000,000 in remuneration or excess parachute payment(s) during the year?	☐ Yes ☒ No			

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

1 List all officers, directors, trustees, and foundation managers and their compensation.

(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
J. CHRISTOPHER EAGAN 143 6TH AVENUE BROOKLYN, NY 11217	PRESIDENT & TREASURER 0.00	0.	0.	0.
MARIA EAGAN 12135 SADDLE ROAD CARMEL VALLEY, CA 93924	EXECUTIVE VICE-PRESIDENT 0.00	0.	0.	0.
KELSY RICHMOND 32 BOND STREET APT 1112 BROOKLYN, NY 11201	VICE PRESIDENT 0.00	0.	0.	0.
KRISTY EAGAN 377 RECTOR PLACE, APT 7K NEW YORK, NY 10280	VICE PRESIDENT & SECRETARY 0.00	0.	0.	0.

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

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

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

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

3 Five highest-paid independent contractors for professional services. 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	
2	
3	
4	

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
1 N/A		
2		
All other program-related investments. See instructions. 3		
Total. Add lines 1 through 3	▶	0.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	6,896,895.
b	Average of monthly cash balances	1b	113,629.
c	Fair market value of all other assets	1c	
d	**Total** (add lines 1a, b, and c)	1d	7,010,524.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) — 1e: 0.		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	7,010,524.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	105,158.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	6,905,366.
6	**Minimum investment return.** Enter 5% of line 5	6	345,268.

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

1	Minimum investment return from Part X, line 6			1	345,268.
2a	Tax on investment income for 2019 from Part VI, line 5	2a	7,455.		
b	Income tax for 2019. (This does not include the tax from Part VI.)	2b			
c	Add lines 2a and 2b			2c	7,455.
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	337,813.
4	Recoveries of amounts treated as qualifying distributions			4	0.
5	Add lines 3 and 4			5	337,813.
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	337,813.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	365,450.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	4	365,450.
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	365,450.

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2018	(c) 2018	(d) 2019
1 Distributable amount for 2019 from Part XI, line 7				337,813.
2 Undistributed income, if any, as of the end of 2019				
a Enter amount for 2018 only			0.	
b Total for prior years: ___ , ___ , ___		0.		
3 Excess distributions carryover, if any, to 2019:				
a From 2014 — 48,213.				
b From 2015 — 53,291.				
c From 2016				
d From 2017				
e From 2018 — 3,117.				
f **Total** of lines 3a through e	104,621.			
4 Qualifying distributions for 2019 from Part XII, line 4: ▶ $ 365,450.				
a Applied to 2018, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2019 distributable amount				337,813.
e Remaining amount distributed out of corpus	27,637.			
5 Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	132,258.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2018. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2019. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2014 not applied on line 5 or line 7	48,213.			
9 **Excess distributions carryover to 2020.** Subtract lines 7 and 8 from line 6a	84,045.			
10 Analysis of line 9:				
a Excess from 2015 — 53,291.				
b Excess from 2016				
c Excess from 2017				
d Excess from 2018 — 3,117.				
e Excess from 2019 — 27,637.				

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

1 a 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 ▶

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

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

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

1 **Information Regarding Foundation Managers:**

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

J. CHRISTOPHER EAGAN

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.

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

J. CHRISTOPHER EAGAN, 2128948100
143 6TH AVENUE, BROOKLYN, NY 11217

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

NONE

c Any submission deadlines.

NONE

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

NONE

Part XV Supplementary Information *(continued)*

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
ALZHEIMER'S FOUNDATION OF AMERICA 322 8TH AVENUE #700 NEW YORK, NY 10001	N/A	PUBLIC CHARITY	SUPPORT FOR INDIVIDUALS AND FAMILIES CONFRONTING DEMENTIA	2,000.
AMERICAN DIABETES ASSOCIATION 333 7TH AVENUE #1700 NEW YORK, NY 10001	N/A	PUBLIC CHARITY	SUPPORT FOR DIABETES PREVENTION AND CURE	2,000.
AMERICAN MUSEUM OF NATURAL HISTORY CENTRAL PARK WEST & 79TH STREET NEW YORK, NY 10024	N/A	PUBLIC CHARITY	SUPPORT ART EDUCATION	1,000.
AMERICARES 88 HAMILTON AVENUE STAMFORD, CT 06906	N/A	PUBLIC CHARITY	SUPPORT GLOBAL HEALTH AND DISASTER RELIEF	3,000.
AMNESTY INTERNATIONAL USA 5 PENNSYLVANIA PLAZA NEW YORK, NY 10001				2,000.
Total SEE CONTINUATION SHEET(S)			▶ 3a	365,450.
b Approved for future payment NONE				
Total			▶ 3b	0.

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
AMVETS NATIONAL SERVICE FOUNDATION 4647 FORBES BOULEVARD LANHAM, MD 20706	N/A	PUBLIC CHARITY	SUPPORT FOR VETERANS	1,000.
ARTHRITIS FOUNDATION 122 E 42ND STREET #18 NEW YORK NEW YORK, NY 10168	N/A	PUBLIC CHARITY	SUPPORT PREVENTION, CONTROL AND CURE OF ARTHRITIS	1,000.
BARRINGTON STAGE COMPANY 30 UNION STREET PITTSBURG, MA 01201	N/A	PUBLIC CHARITY	SUPPORT FOR THE PERFORMING ARTS	9,400.
BED-STUY CAMPAIGN AGAINST HUNGER 2010 FULTON STREET BROOKLYN, NY 11233	N/A	PUBLIC CHARITY	SUPPORT FOR EMERGENCY FOOD SUPPLY	2,000.
BIG BROTHERS BIG SISTERS OF NEW YORK CITY 40 RECTOR STREET NEW YORK, NY 10006	N/A	PUBLIC CHARITY	SUPPORT FOR YOUTH MENTORING	2,500.
BOSTON SYMPHONY ORCHESTRA 301 MASSACHUSETTS AVENUE BOSTON, MA 02115	N/A	PUBLIC CHARITY	SUPPORT FOR MUSIC ENJOYMENT TO MILLIONS	10,000.
BROOKLYN ACADEMY OF MUSIC 30 LAFAYETTE AVENUE BROOKLYN, NY 11217	N/A	PUBLIC CHARITY	SUPPORT FOR THEATRE AND ARTS EDUCATION	5,000.
BROOKLYN CONSERVATORY OF MUSIC 58TH 7TH AVENUE BROOKLYN, NY 11217	N/A	PUBLIC CHARITY	SUPPORT MUSIC EDUCATION	500.
CARNEGIE HALL 881 7TH AVENUE NEW YORK, NY 10019	N/A	PUBLIC CHARITY	SUPPORT MUSIC EDUCATION	6,500.
CATHOLIC RELIEF SERVICE 229 W. LEXINGTON STREET BALTIMORE, MD 21201	N/A	PUBLIC CHARITY	SUPPORT RELIGIOUS FAITH	1,000.
Total from continuation sheets				355,450.

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
CENTER FOR COMMUNITY ADVOCACY 22 W GABILAN STREET SALINAS, CA 93901	N/A	PUBLIC CHARITY	SUPPORT FOR FARM WORKERS AND LOW INCOME FAMILIES	5,000.
CHILTON MEDICAL CENTER 97 WEST PKWY POMPTON PLAINS, NJ 07444	N/A	PUBLIC CHARITY	SUPPORT COMMUNITY HEALTH	5,000.
CHURCHES FOR MIDDLE EAST PEACE 110 MARYLAND AVENUE, NE #311 WASHINGTON, DC 20002	N/A	PUBLIC CHARITY	SUPPORT PEACE IN MIDDLE EAST	1,000.
COLUMBIA UNIVERISTY COLLEGE FUND 116TH STREET NEW YORK, NY 10027	N/A	PUBLIC CHARITY	SUPPORT EDUCATION	5,000.
COMMUNITY HOSPITAL OF MONTEREY PENINSULA 23625 HOLMAN HWY MONTEREY, CA 93942	N/A	PUBLIC CHARITY		5,000.
COVENANT HOUSE 460 W 41ST STREET NEW YORK, NY 10036	N/A	PUBLIC CHARITY	SUPPORT TRAFFICKING AND HOMELESSNESS	1,000.
DOOR TO HOPE 130 CHURCH STREET SALINAS, CA 93901	N/A	PUBLIC CHARITY	SUPPORT FOR PEOPLE WITH ADDICTION, MENTAL ISSUES AND TRAUMA	2,500.
EASTERN CHRISTIAN CHILDREN'S RETREAT 700 MOUNTAIN AVENUE WYCKOFF, NJ 07481	N/A	PUBLIC CHARITY	SUPPORT FOR INDIVIDUALS WITH DEVELOPMENTAL DISABILITIES	1,000.
EQUAL JUSTICE AMERICA 13540 EAST BOUNDARY ROAD MIDLOTHIAN, VA 23112	N/A	PUBLIC CHARITY	SUPPORT FOR LEGAL SERVICES	500.
FOOD BANK FOR MONTEREY COUNTY 815 MARKET STREET, #5 SALINAS, CA 93901	N/A	PUBLIC CHARITY	SUPPORT FOR EMERGENCY FOOD SUPPLY	5,000.
Total from continuation sheets				

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
FORDHAM LAW SCHOOL ANNUAL FUND 150 W 62ND STREET NEW YORK, NY 10023	N/A	PUBLIC CHARITY	SUPPORT FOR EDUCATION	2,500.
FORDHAM LAW SCHOOL ANNUAL FUND 150 W 62ND STREET NEW YORK, NY 10023	N/A	PUBLIC CHARITY	SUPPORT FOR EDUCATION	2,500.
GATHERING FOR WOMEN 147 EL DORADO ST MONTEREY, CA 93940				5,000.
GIRLS INC. OF THE CENTRAL COAST 318 CAYUGA STREET #209 SALINAS, CA 93901	N/A	PUBLIC CHARITY	SUPPORT FOR GIRLS COMMUNITY	2,500.
GIRLS ON THE RUN NYC 81 PROSPECT ST BROOKLYN, NY 11201	N/A	PUBLIC CHARITY	SUPPORT FOR GIRLS COMMUNITY	1,500.
GMHC 446 WEST 33RD STREET NEW YORK, NY 10001	N/A	PUBLIC CHARITY	SUPPORT TO END AIDS	1,000.
GODDARD COLLEGE CORPORATION 123 PITKIN ROAD PLAINFIELD, VT 05667	N/A	PUBLIC CHARITY	SUPPORT FOR EDUCATION	7,000.
HEALING THE CHILDREN 112 5TH AVENUE HAWTHORNE, NJ 07506	N/A	PUBLIC CHARITY	SUPPORT QUALITY OF MEDICAL TREATMENTS FOR CHILDREN	1,000.
HEART & SOUL CHARITABLE FUND, INC. 1157 LEXINGTON AVENUE NEW YORK, NY 10075	N/A	PUBLIC CHARITY	SUPPORT FOR MARGINALIZED POPULATION OF NEW YORK	1,000.
HOSPICE GIVING FOUNDATION 80 GARDEN CT #201 MONTEREY, CA 93940				2,000.
Total from continuation sheets				

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
HUMAN RIGHTS CAMPAIGN FOUNDATION 1640 RHODE ISLAND AVE., N.W. WASHINGTON, DC 20036	N/A	PUBLIC CHARITY	SUPPORT FOR EQUALITY	10,000.
ICE THEATER OF NEW YORK 62 CHELSEA PIERS, SUITE 308 NEW YORK, NY 10011	N/A	PUBLIC CHARITY	SUPPORT FOR THEATRE EDUCATION	8,000.
ICE THEATER OF NEW YORK 62 CHELSEA PIERS, SUITE 308 NEW YORK, NY 10011	N/A	PUBLIC CHARITY	SUPPORT FOR THEATRE EDUCATION	2,000.
INTER SCHOOL ORCHESTRAS OF NEW YORK 121 W 27TH STREET NEW YORK, NY 10001	N/A	PUBLIC CHARITY	SUPPORT FOR EQUAL OPPORTUNITIES OF YOUTHS IN ORCHESTRA	500.
INTERLOCHEN ANNUAL FUND 4000 HIGHWAY M-137 INTERLOCHEN, MI 49643	N/A	PUBLIC CHARITY	SUPPORT FOR ART	2,000.
KERNES ADAPTIVE AQUATICS 15 PORTOLA AVENUE MONTEREY, CA 93940	N/A	PUBLIC CHARITY	SUPPORT FOR REHABILITATION AND RELIEF THROUGH WATER EXERCISES	2,000.
LAGUARDIA PARENTS ASSOCIATION 100 AMSTERDAM AVENUE NEW YORK, NY 10023	N/A	PUBLIC CHARITY	SUPPORT FOR THEATER CHILDREN	500.
LEVITTOWN UNION FREE SCHOOL DISTRICT 150 ABBEY LANE LEVITTOWN, NY 11756	N/A	PUBLIC CHARITY	SUPPORT FOR EDUCATION	42,000.
LINCOLN CENTER THEATER 150 W 65TH ST NEW YORK, NY 10023				10,000.
MANHATTAN SCHOOL OF MUSIC ANNUAL FUND 120 CLAREMONT AVENUE NEW YORK, NY 10027	N/A	PUBLIC CHARITY	SUPPORT FOR MUSIC EDUCATION	2,000.
Total from continuation sheets				

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
MARYKNOLL FATHERS AND BROTHERS PO BOX 302 MARYKNOLL, NY 10545	N/A	PUBLIC CHARITY	SUPPORT THE POOR AND SICK	1,000.
MEDICAL MISSIONS FOR CHILDREN, INC. 35 GETTY AVENUE PATTERSON, NJ 07503	N/A	PUBLIC CHARITY	SUPPORT QUALITY OF MEDICAL TREATMENTS	12,000.
MEMORIAL SLOAN KETTERING CANCER 1275 YORK AVE MEW YORK, NY 10065		PUBLIC CHARITY	SUPPORT FOR THOSE WITH CANCER	2,000.
MONTEREY BAY AQUARIUM FOUNDATION 886 CANNERY ROW MONTEREY, CA 93940	N/A	PUBLIC CHARITY	SUPPORT TO PROTECT OCEAN LIFE	10,000.
MSF USA; DOCTORS WITHOUT BORDERS 333 7TH AVENUE, 2ND FLOOR NEW YORK, NY 10001	N/A	PUBLIC CHARITY	SUPPORT EMERGENCY MEDICAL AID WORDWIDE	3,000.
MUSEUM FOUNDATION OF PACIFIC GROVE INC 165 FOREST AVE PACIFIC GROVE, CA 93950				2,000.
NATIONAL ASSOCIATION FOR THE ADVANCEMENT OF COLOR PEOPLE 40 RECTOR STREET, 5TH FLOOR NEW YORK, NY 10006	N/A	PUBLIC CHARITY	MADDEN - 04/30/20 02:18PM WORKSHEET PRIVATE FOUNDATION	1,000.
NATIONAL CENTER FOR LESBIAN RIGHTS 870 MARKET STREET, SUITE 370 SAN FRANCISCO, CA 94102	N/A	PUBLIC CHARITY	SUPPORT FOR EQUALITY	10,000.
NATIONAL LAW ENFORCEMENT OFFICER MEMORIAL FUND SUPPORTER SERVICES E ST NW WASHINGTON, DC 20004	N/A	PUBLIC CHARITY	SUPPORT TO MAINTAIN THE OFFICERS MEMORIAL	1,000.
NATIONAL MULTIPLE SCLEROSIS SOCIETY - NJ CHAPTER 1480 U.S. 9 #301 WOODBRIDGE, NJ 07095	N/A	PUBLIC CHARITY	SUPPORT IMPROVING QUALITY OF LIFE AFFECTED BY MS	2,000.
Total from continuation sheets				

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Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
NATIONAL PARKINSON FOUNDATION, INC. 200 SE 1ST STREET, SUITE 800 MIAMI, FL 33131	N/A	PUBLIC CHARITY	SUPPORT PARKINSON CURE RESEARCH	2,000.
NEW YORK CHIROPRACTIC COLLEGE 2360 NEW YORK 89 SENECA FALLS, NY 13148	N/A	PUBLIC CHARITY	SUPPORT FOR CHIROPRACTIC EDUCATION	7,000.
NEW YORK PHILHARMONIC 10 LINCOLN CENTER NEW YORK, NY 10023	N/A	PUBLIC CHARITY	SUPPORT FOR THEATRE AND ARTS EDUCATION	25,000.
NEW YORK PHILHARMONIC 10 LINCOLN CENTER NEW YORK, NY 10023	N/A	PUBLIC CHARITY	SUPPORT FOR THE PERFORMING ARTS	4,300.
NEW YORK PRESBYTERIAN HOSPITAL JAMES LENOX SOCIETY 5141 BROADWAY NEW YORK, NY 10034	N/A	PUBLIC CHARITY	SUPPORT HEALTH	2,000.
NPR FOUNDATION 11 W 42ND STREET #19 NEW YORK, NY 10036	N/A	PUBLIC CHARITY	SUPPORT FOR NEWS	1,500.
OGALA LAKODA COLLEGE 3 MILE CREEK ROAD KYLE, SD 57752	N/A	PUBLIC CHARITY	SUPPORT FOR TRIBAL EDUCATION	1,000.
PACKER COLLEGIATE INSTITUTE 170 JORALEMON STREET BROOKLYN, NY 11201	N/A	PUBLIC CHARITY	SUPPORT FOR EDUCATION	3,000.
PAPER MILL PLAYHOUSE 22 BROOKSIDE DRIVE MILLBURN, NJ 07041	N/A	PUBLIC CHARITY	SUPPORT FOR THEATRE EDUCATION	1,000.
PARK SLOPE CHRISTIAN HELP-CHIPS 200 4TH AVENUE BROOKLYN, NY 11217	N/A	PUBLIC CHARITY	SUPPORT FOR HOMELESS WOMEN AND INFANTS	2,000.
Total from continuation sheets				

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
PLANNED PARENTHOOD FEDERATION OF AMERICA 123 WILLIAM STREET NEW YORK, NY 10038	N/A	PUBLIC CHARITY	SUPPORT FOR REPRODUCTIVE RIGHTS	2,000.
PROSPECT PARK ALLIANCE 95 PROSPECT PARK WEST BROOKLYN, NY 11215	N/A	PUBLIC CHARITY	SUPPORT OF WILDLIFE	3,000.
PREP FOR PREP 328 W 71ST ST NEW YORK, NY 10023				2,500.
RED CLOUD INDIAN SCHOOL 100 MISSION DRIVE PINE RIDGE, SD 57770	N/A	PUBLIC CHARITY	SUPPORT FOR INDIAN EDUCATION	1,000.
REGIS HIGH SCHOOL 55 E 84TH ST NEW YORK, NY 10028				1,000.
SIGNATURE THEATRE COMPANY 480 W 42ND STREET NEW YORK, NY 10036	N/A	PUBLIC CHARITY	SUPPORT FOR THE PERFORMING ARTS	3,000.
SPCA FOR MONTERERY COUNTY 1002 MONTEREY SALINAS HWY SALINAS, CA 93908	N/A	PUBLIC CHARITY	SUPPORT FOR ANIMALS IN NEED	3,000.
ST. FRANCIS OF ASSISI CHURCH 135 W 31ST STREET NEW YORK, NY 10001	N/A	PUBLIC CHARITY	SUPPORT RELIGIOUS FAITH	16,000.
THE CARTER CENTER 452 FREEDOM PARKWAY ATLANTA, GA 30307	N/A	PUBLIC CHARITY	SUPPORT FREEEDOM, DEMOCRACY AND IMPROVE HEALTH	3,000.
THE EDUCATION ALLIANCE, INC. 344 E 14TH ST NEW YORK, NY 10003				1,500.
Total from continuation sheets				

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
THE JULLIARD SCHOOL 60 LINCOLN CENTER PLAZA NEW YORK, NY 10023				6,250.
THE NEW YORK TIMES NEEDIESET CASES FUND PO BOX 5193 NEW YORK, NY 10087	N/A	PUBLIC CHARITY	SUPPORT FOR SOCIAL SERVICES	2,000.
THIRTEEN/WNET 825 EIGHT AVENUE NEW YORK, NY 10019	N/A	PUBLIC CHARITY	SUPPORT CULTURAL AND EDUCATION MEDIA	2,000.
UNITED NATIONS ASSOCIATION OF UNITED STATES OF AMERICA 801 2ND AVENUE #2 NEW YORK, NY 10017	N/A	PUBLIC CHARITY	SUPPORT FOR A BETTER WORLD	2,000.
UNITED STATES FUND FOR UNICEF 331 E 38TH STREET #3 NEW YORK, NY 10016	N/A	PUBLIC CHARITY	MADDEN - 04/17/19 05:01PM WORKSHEET PRIVATE FOUNDATION	6,000.
UNITED STATES NAVY MEMORIAL 701 PENNSYLVANIA AVE NW WASHINGTON, DC 20004	N/A	PUBLIC CHARITY	SUPPORT NAVAL HERITAGE, VALUES AND TRADITIONS	1,000.
UNITED WAY OF PASSAIC COUNTY 301 MAIN STREET PATTERSON, NJ 07505	N/A	PUBLIC CHARITY	SUPPORT COMMUNITY PROGRAMS	5,000.
UNIVERSITY OF COLORADO FOUNDATION 1800 GRANT STREET #725 DENVER, CO 80203	N/A	PUBLIC CHARITY	SUPPORT FOR EDUCATION	7,500.
UTICA COLLEGE ANNUAL FUND 1600 BURRSTONE ROAD UTICA, NY 13502	N/A	PUBLIC CHARITY	SUPPORT FOR EDUCATION	7,500.
WE CAN KICK IT 34-27 33RD STREET LONG ISLAND CITY, NY 11106		PUBLIC CHARITY	SUPPORT FOR THOSE AFFECTED BY CANCER	500.
Total from continuation sheets				

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
WEILL CORNELL MEDICAL COLLEGE 1300 YORK AVENUE NEW YORK, NY 10065	N/A	PUBLIC CHARITY	SUPPORT EDUCATION IN MEDICINE	2,000.
WNYC RADIO 160 VARICK STREET NEW YORK, NY 10013	N/A	PUBLIC CHARITY	SUPPORT FOR EXCELLENT RADIO PROGRAMMING	1,500.
WORLD WILD LIFE FUND 1250 24TH STREET, N.W. WASHINGTON, DC 20037	N/A	PUBLIC CHARITY	SUPPORT FOR ENDANGERED SPECIES	1,000.
WOUNDED WARRIOR PROJECT 370 7TH AVENUE NEW YORK, NY 10001	N/A	PUBLIC CHARITY	SUPPORT FOR VETERANS	2,000.
WQXR 160 VARICK STREET, 8TH FLOOR NEW YORK, NY 10013	N/A	PUBLIC CHARITY	SUPPORT FOR EXCELLENT RADIO PROGRAMMING	2,500.
YOUNG AUDIENCES NEW YORK 1 E 53RD STREET NEW YORK, NY 10022	N/A	PUBLIC CHARITY	SUPPORT FOR THEATR VISUAL AND DIGITAL ARTS PROGRAMS	1,000.
YOUTH ON COURSE 3200 LOPEZ ROAD PEBBLE BEACH, CA 93953	N/A	PUBLIC CHARITY	SUPPORT FOR YOUTH GOLF EDUCATION	2,000.
Total from continuation sheets				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	13,683.	
4 Dividends and interest from securities			14	134,353.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory					224,716.
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0.		148,036.	224,716.
13 **Total.** Add line 12, columns (b), (d), and (e)				13	372,752.

(See worksheet in line 13 instructions to verify calculations.)

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes).

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

		Yes	No
1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a Transfers from the reporting foundation to a noncharitable exempt organization of:			
(1) Cash	1a(1)		X
(2) Other assets	1a(2)		X
b Other transactions:			
(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
(3) Rental of facilities, equipment, or other assets	1b(3)		X
(4) Reimbursement arrangements	1b(4)		X
(5) Loans or loan guarantees	1b(5)		X
(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.

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

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: 11/15/2020 — Title: PRESIDENT

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

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
BARRY KLARBERG	BARRY KLARBERG	11/16/20		P01493095
Firm's name ▶ MONARCH BUSINESS & WEALTH MGMT LLC			Firm's EIN ▶ 27-4125859	
Firm's address ▶ 209 E. 31ST STREET NEW YORK, NY 10016			Phone no. 212-894-8100	

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

Name of the organization	Employer identification number
EAGAN FAMILY FOUNDATION, INC. C/O MONARCH WEALTH & BUSINESS MGMT	13-4085533

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	Employer identification number
EAGAN FAMILY FOUNDATION, INC. C/O MONARCH WEALTH & BUSINESS MGMT	13-4085533

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	ESTATE OF JOHN EAGAN 143 6TH AVENUE BROOKLYN, NY 11217	$	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions.)
2	ESTATE OF JOHN EAGAN 143 6TH AVENUE BROOKLYN, NY 11217	$	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions.)
3	ESTATE OF JOHN EAGAN 143 6TH AVENUE BROOKLYN, NY 11217	$	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions.)
4	JOHN EAGAN- DECEASED 143 6TH AVENUE BROOKLYN, NY 11217	$	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
5	ESTATE OF JOHN EAGAN 143 6TH AVENUE BROOKLYN, NY 11217	$	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions.)
6	JOHN EAGAN- DECEASED 143 6TH AVENUE BROOKLYN, NY 11217	$	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

Name of organization	Employer identification number
EAGAN FAMILY FOUNDATION, INC. C/O MONARCH WEALTH & BUSINESS MGMT	13-4085533

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

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

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

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

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

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

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

Name of organization	Employer identification number
EAGAN FAMILY FOUNDATION, INC. C/O MONARCH WEALTH & BUSINESS MGMT	13-4085533

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

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

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

(e) Transfer of gift

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

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

(e) Transfer of gift

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

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

(e) Transfer of gift

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

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

(e) Transfer of gift

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

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
WF 2439 INTEREST	10.	10.	10.
WF 4605 INTEREST	290.	290.	290.
WF 9077 INTEREST	13,383.	13,383.	13,383.
TOTAL TO PART I, LINE 3	13,683.	13,683.	13,683.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME
WF 2439 DIVIDENDS	21,431.	0.	21,431.	21,431.	21,431.
WF 4605 DIVIDENDS	76,376.	0.	76,376.	76,376.	76,376.
WF 9077 DIVIDENDS	36,546.	0.	36,546.	36,546.	36,546.
TO PART I, LINE 4	134,353.	0.	134,353.	134,353.	134,353.

FORM 990-PF TAXES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES	1,817.	0.	0.	0.
TO FORM 990-PF, PG 1, LN 18	1,817.	0.	0.	0.

FORM 990-PF OTHER EXPENSES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ADVISORY FEES	53,317.	0.	0.	0.
TO FORM 990-PF, PG 1, LN 23	53,317.	0.	0.	0.

FORM 990-PF OTHER INCREASES IN NET ASSETS OR FUND BALANCES STATEMENT 5

DESCRIPTION	AMOUNT
CHANGE IN VALUE OF STOCKS, OPTIONS, ETFS - WF 2439	115,085.
CHANGE IN VALUE OF STOCKS, OPTIONS, ETFS - WF 4605	613,084.
CHANGE IN VALUE OF STOCKS, OPTIONS, ETFS - WF 9077	581,184.
SECURITIES PURCHASED	1,887,223.
SECURITIES SOLD AND REDEEMED	2,029,735.
UNREALIZED GAIN/LOSS	277,485.
TOTAL TO FORM 990-PF, PART III, LINE 3	5,503,796.

FORM 990-PF OTHER INVESTMENTS STATEMENT 6

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
WELLS FARGO-VARIOUS	FMV	7,265,178.	7,265,178.
TOTAL TO FORM 990-PF, PART II, LINE 13		7,265,178.	7,265,178.

FORM 990-PF INTEREST AND PENALTIES STATEMENT 7

TAX DUE FROM FORM 990-PF, PART VI	7,455.
UNDERPAYMENT PENALTY	282.
LATE PAYMENT INTEREST	76.
LATE PAYMENT PENALTY	186.
TOTAL AMOUNT DUE	7,999.

FORM 990-PF LATE PAYMENT PENALTY STATEMENT 8

DESCRIPTION	DATE	AMOUNT	BALANCE	MONTHS	PENALTY
TAX DUE	07/15/20	7,455.	7,455.	5	186.
DATE FILED	11/16/20		7,455.		
TOTAL LATE PAYMENT PENALTY					186.

FORM 990-PF LATE PAYMENT INTEREST STATEMENT 9

DESCRIPTION	DATE	AMOUNT	BALANCE	RATE	DAYS	INTEREST
TAX DUE	07/15/20	7,455.	7,455.	.0300	124	76.
DATE FILED	11/16/20		7,531.			
TOTAL LATE PAYMENT INTEREST						76.

EXTENDED TO NOVEMBER 16, 2020

Form **4720**

Department of the Treasury
Internal Revenue Service

Return of Certain Excise Taxes Under Chapters 41 and 42 of the Internal Revenue Code

(Sections 170(f)(10), 664(c)(2), 4911, 4912, 4941, 4942, 4943, 4944, 4945, 4955, 4958, 4959, 4960, 4965, 4966, 4967, and 4968)
▶ Go to www.irs.gov/Form4720 for instructions and the latest information.

OMB No 1545-0052

2019

For calendar year 2019 or other tax year beginning , 2019, and ending ,

Name of organization or entity	Employer identification number
EAGAN FAMILY FOUNDATION, INC. C/O MONARCH WEALTH & BUSINESS MGMT	13-4085533
Number, street, and room or suite no. (or P.O. box if mail is not delivered to street address) 209 EAST 31ST STREET	Check box for type of annual return: ☐ Form 990 ☐ Form 990-EZ
City or town, state or province, country, and ZIP or foreign postal code NEW YORK, NY 10016	☒ Form 990-PF ☐ Other ☐ Form 5227

		Yes	No
A	Is the organization a foreign private foundation within the meaning of section 4948(b)?		X
B	Has corrective action been taken on any taxable event that resulted in Ch. 42 taxes being reported on this form? (Enter "N/A" if not applicable)	N/A	

If "Yes," attach a detailed description and documentation of the corrective action taken and, if applicable, enter the fair market value of any property recovered as a result of the correction ▶ $. If "No," (that is, any uncorrected acts or transactions), attach an explanation (see instructions).

Part I Taxes on Organization (Sections 170(f)(10), 664(c)(2), 4911(a), 4912(a), 4942(a), 4943(a), 4944(a)(1), 4945(a)(1), 4955(a)(1), 4959, 4960(a), 4965(a)(1), 4966(a)(1), and 4968(a))

1	Tax on undistributed income - Schedule B, line 4	1	
2	Tax on excess business holdings - Schedule C, line 7	2	
3	Tax on investments that jeopardize charitable purpose - Schedule D, Part I, column (e)	3	
4	Tax on taxable expenditures - Schedule E, Part I, column (g)	4	
5	Tax on political expenditures - Schedule F, Part I, column (e)	5	
6	Tax on excess lobbying expenditures - Schedule G, line 4	6	
7	Tax on disqualifying lobbying expenditures - Schedule H, Part I, column (e)	7	
8	Tax on premiums paid on personal benefit contracts	8	
9	Tax on being a party to prohibited tax shelter transactions - Schedule J, Part I, column (h)	9	
10	Tax on taxable distributions - Schedule K, Part I, column (f)	10	
11	Tax on a charitable remainder trust's unrelated business taxable income. Attach statement	11	
12	Tax on failure to meet the requirements of section 501(r)(3) - Schedule M, Part II, line 2	12	
13	Tax on excess executive compensation - Schedule N	13	
14	Tax on net investment income of private colleges and universities - Schedule O	14	
15	**Total** (add lines 1 - 14)	15	

Part II-A Taxes on Managers, Self-Dealers, Disqualified Persons, Donors, Donor Advisors, and Related Persons

(Sections 4912(b), 4941(a), 4944(a)(2), 4945(a)(2), 4955(a)(2), 4958(a), 4965(a)(2), 4966(a)(2), and 4967(a))

	(a) Name and address of person subject to tax. City or town, state or province, country, ZIP or foreign postal code	(b) Taxpayer identification number
a		
b		
c		

	(c) Tax on self-dealing - Schedule A, Part II, col. (d), and Part III, col. (d)	(d) Tax on investments that jeopardize charitable purpose - Schedule D, Part II, col. (d)	(e) Tax on taxable expenditures - Schedule E, Part II, col. (d)	(f) Tax on political expenditures - Schedule F, Part II, col. (d)
a				
b				
c				
Total				

	(g) Tax on disqualifying lobbying expenditures - Sch H, Part II, col. (d)	(h) Tax on excess benefit transactions - Schedule I, Part II, col. (d), and Part III, col. (d)	(i) Tax on being a party to prohibited tax shelter transactions - Schedule J, Part II, col. (d)	(j) Tax on taxable distributions - Schedule K, Part II, col. (d)
a				
b				
c				
Total				

	(k) Tax on prohibited benefits - Sch L, Part II, col. (d), and Part III, col. (d)	(l) Total - Add cols. (c) through (k)
a		
b		
c		
Total		

924061 12-04-19 LHA **For Privacy Act and Paperwork Reduction Act Notice, see the separate instructions.** Form **4720** (2019)

Part II-B Summary of Taxes (See Tax Payments in the instructions.)

1	Enter the taxes listed in Part II-A, column (l), that apply to managers, self-dealers, disqualified persons, donors, donor advisors, and related persons who sign this form. If all sign, enter the total amount from Part II-A, column (l)	1	
2	**Total tax.** Add Part I, line 15, and Part II-B, line 1	2	
3	Total payments including amount paid with Form 8868 (see instructions)	3	
4	**Tax due.** If line 2 is larger than line 3, enter amount owed (see instructions) ▶	4	0.
5	**Overpayment.** If line 2 is smaller than line 3, enter the difference. This is your refund ▶	5	

SCHEDULE A - Initial Taxes on Self-Dealing (Section 4941)

Part I Acts of Self-Dealing and Tax Computation

(a) Act number	(b) Date of act	(c) Description of act
1		
2		
3		
4		
5		

(d) Question number from Form 990-PF, Part VII-B, or Form 5227, Part VI-B, applicable to the act	(e) Amount involved in act	(f) Initial tax on self-dealer (10% of col. (e))	(g) Tax on foundation managers (if applicable) (lesser of $20,000 or 5% of col (e))

Part II Summary of Tax Liability of Self-Dealers and Proration of Payments

(a) Names of self-dealers liable for tax	(b) Act no. from Part I, col. (a)	(c) Tax from Part I, col. (f), or prorated amount	(d) Self-dealer's total tax liability (add amounts in col. (c)) (see instructions)

Part III Summary of Tax Liability of Foundation Managers and Proration of Payments

(a) Names of foundation managers liable for tax	(b) Act no. from Part I, col. (a)	(c) Tax from Part I, col. (g), or prorated amount	(d) Manager's total tax liability (add amounts in col. (c)) (see instructions)

SCHEDULE B - Initial Tax on Undistributed Income (Section 4942)

1	Undistributed income for years before 2018 (from Form 990-PF for 2019, Part XIII, line 6d)	1	
2	Undistributed income for 2018 (from Form 990-PF for 2019, Part XIII, line 6e)	2	
3	Total undistributed income at end of current tax year beginning in 2019 and subject to tax under section 4942 (add lines 1 and 2)	3	
4	**Tax** - Enter 30% of line 3 here and on Part I, line 1	4	

SCHEDULE C - Initial Tax on Excess Business Holdings (Section 4943)

Business Holdings and Computation of Tax

If you have taxable excess holdings in more than one business enterprise, attach a separate schedule for each enterprise. Refer to the instructions for each line item before making any entries.

Name and address of business enterprise

Employer identification number ▶

Form of enterprise (corporation, partnership, trust, joint venture, sole proprietorship, etc.) ▶

		(a) Voting stock (profits interest or beneficial interest)	(b) Value	(c) Nonvoting stock (capital interest)
1 Foundation holdings in business enterprise	1			
2 Permitted holdings in business enterprise	2			
3 Value of excess holdings in business enterprise	3			
4 Value of excess holdings disposed of within 90 days; or, other value of excess holdings not subject to section 4943 tax (attach statement)	4			
5 Taxable excess holdings in business enterprise - line 3 minus line 4	5			
6 Tax - Enter 10% of line 5	6			
7 **Total tax** - Add amounts on line 6, columns (a), (b), and (c); enter total here and on Part I, line 2	7			

SCHEDULE D - Initial Taxes on Investments That Jeopardize Charitable Purpose (Section 4944)

Part I Investments and Tax Computation

(a) Investment number	(b) Date of investment	(c) Description of investment	(d) Amount of investment	(e) Initial tax on foundation (10% of col. (d))	(f) Initial tax on foundation managers (if applicable) - (lesser of $10,000 or 10% of col. (d))
1					
2					
3					
4					
5					
Total - Column (e). Enter here and on Part I, line 3					
Total - Column (f). Enter total (or prorated amount) here and in Part II, column (c), below					

Part II Summary of Tax Liability of Foundation Managers and Proration of Payments

(a) Names of foundation managers liable for tax	(b) Investment no. from Part I, col. (a)	(c) Tax from Part I, col. (f), or prorated amount	(d) Manager's total tax liability (add amounts in col. (c)) (see instructions)

SCHEDULE E - Initial Taxes on Taxable Expenditures (Section 4945)

Part I Expenditures and Computation of Tax

(a) Item number	(b) Amount	(c) Date paid or incurred	(d) Name and address of recipient	(e) Description of expenditure and purposes for which made
1				
2				
3				
4				
5				

(f) Question number from Form 990-PF, Part VII-B, or Form 5227, Part VI-B, applicable to the expenditure	(g) Initial tax imposed on foundation (20% of col. (b))	(h) Initial tax imposed on foundation managers (if applicable)- (lesser of $10,000 or 5% of col (b))
Total - Column (g). Enter here and on Part I, line 4		
Total - Column (h). Enter total (or prorated amount) here and in Part II, column (c), below		

Part II Summary of Tax Liability of Foundation Managers and Proration of Payments

(a) Names of foundation managers liable for tax	(b) Item no. from Part I, col. (a)	(c) Tax from Part I, col. (h), or prorated amount	(d) Manager's total tax liability (add amounts in col (c)) (see instructions)

SCHEDULE F - Initial Taxes on Political Expenditures (Section 4955)

Part I Expenditures and Computation of Tax

(a) Item number	(b) Amount	(c) Date paid or incurred	(d) Description of political expenditure	(e) Initial tax imposed on organization or foundation (10% of col (b))	(f) Initial tax imposed on managers (if applicable) (lesser of $5,000 or 2½% of col (b))
1					
2					
3					
4					
5					
Total - Column (e). Enter here and on Part I, line 5					
Total - Column (f). Enter total (or prorated amount) here and in Part II, column (c), below					

Part II Summary of Tax Liability of Organization Managers or Foundation Managers and Proration of Payments

(a) Names of organization managers or foundation managers liable for tax	(b) Item no. from Part I, col. (a)	(c) Tax from Part I, col. (f), or prorated amount	(d) Manager's total tax liability (add amounts in col (c)) (see instructions)

SCHEDULE G - Tax on Excess Lobbying Expenditures (Section 4911)

1	Excess of grass roots expenditures over grass roots nontaxable amount (from Schedule C (Form 990 or 990-EZ), Part II-A, column (b), line 1h). (See the instructions before making an entry.)	1	
2	Excess of lobbying expenditures over lobbying nontaxable amount (from Schedule C (Form 990 or 990-EZ), Part II-A, column (b), line 1i). (See the instructions before making an entry.)	2	
3	Excess lobbying expenditures - enter the larger of line 1 or line 2	3	
4	**Tax** - Enter 25% of line 3 here and on Part I, line 6	4	

SCHEDULE H - Taxes on Disqualifying Lobbying Expenditures (Section 4912)

Part I Expenditures and Computation of Tax

(a) Item number	(b) Amount	(c) Date paid or incurred	(d) Description of lobbying expenditures	(e) Tax imposed on organization (5% of col. (b))	(f) Tax imposed on organization managers (if applicable)- (5% of col (b))
1					
2					
3					
4					
5					
Total - Column (e). Enter here and on Part I, line 7					
Total - Column (f). Enter total (or prorated amount) here and in Part II, column (c), below					

Part II Summary of Tax Liability of Organization Managers and Proration of Payments

(a) Names of organization managers liable for tax	(b) Item no. from Part I, col. (a)	(c) Tax from Part I, col. (f), or prorated amount	(d) Manager's total tax liability (add amounts in col (c)) (see instructions)

SCHEDULE I - Initial Taxes on Excess Benefit Transactions (Section 4958)

Part I Excess Benefit Transactions and Tax Computation

(a) Transaction number	(b) Date of transaction	(c) Description of transaction
1		
2		
3		
4		
5		

(d) Amount of excess benefit	(e) Initial tax on disqualified persons (25% of col. (d))	(f) Tax on organization managers (if applicable) (lesser of $20,000 or 10% of col. (d))

SCHEDULE I - Initial Taxes on Excess Benefit Transactions (Section 4958) *Continued*

Part II Summary of Tax Liability of Disqualified Persons and Proration of Payments

(a) Names of disqualified persons liable for tax	(b) Trans no from Part I, col (a)	(c) Tax from Part I, col (e), or prorated amount	(d) Disqualified person's total tax liability (add amounts in col (c)) (see instructions)

Part III Summary of Tax Liability of 501(c)(3), (c)(4) & (c)(29) Organization Managers and Proration of Payments

(a) Names of 501(c)(3), (c)(4) & (c)(29) organization managers liable for tax	(b) Trans no from Part I, col (a)	(c) Tax from Part I, col (f), or prorated amount	(d) Manager's total tax liability (add amounts in col (c)) (see instructions)

SCHEDULE J - Taxes on Being a Party to Prohibited Tax Shelter Transactions (Section 4965)

Part I Prohibited Tax Shelter Transactions (PTST) and Tax Imposed on the Tax-Exempt Entity

(see instructions)

(a) Transaction number	(b) Transaction date	(c) Type of transaction 1 - Listed 2 - Subsequently listed 3 - Confidential 4 - Contractual protection	(d) Description of transaction
1			
2			
3			
4			
5			

(e) Did the tax-exempt entity know or have reason to know this transaction was a PTST when it became a party to the transaction? Answer **Yes** or **No**	(f) Net income attributable to the PTST	(g) 75% of proceeds attributable to the PTST	(h) Tax imposed on the tax-exempt entity (see instructions)
Total - Column (h). Enter here and on Part I, line 9			

Part II Tax Imposed on Entity Managers (Section 4965) *Continued*

(a) Name of entity manager	(b) Transaction number from Part I, col (a)	(c) Tax - enter $20,000 for each transaction listed in col (b) for each manager in col (a)	(d) Manager's total tax liability (add amounts in col (c))

SCHEDULE K - Taxes on Taxable Distributions of Sponsoring Organizations Maintaining Donor Advised Funds (Section 4966). See the instructions.

Part I Taxable Distributions and Tax Computation

(a) Item number	(b) Name of sponsoring organization and donor advised fund	(c) Description of distribution
1		
2		
3		
4		

(d) Date of distribution	(e) Amount of distribution	(f) Tax imposed on organization (20% of col. (e))	(g) Tax on fund managers (lesser of 5% of col. (e) or $10,000)
Total - Column (f). Enter here and on Part I, line 10			
Total - Column (g). Enter total (or prorated amount) here and in Part II, column (c), below			

Part II Summary of Tax Liability of Fund Managers and Proration of Payments

(a) Name of fund managers liable for tax	(b) Item no from Part I, col (a)	(c) Tax from Part I, col (g) or prorated amount	(d) Manager's total tax liability (add amounts in col (c)) (see instructions)

SCHEDULE L - Taxes on Prohibited Benefits Distributed From Donor Advised Funds (Section 4967)

See the instructions

Part I Prohibited Benefits and Tax Computation

(a) Item number	(b) Date of prohibited benefit	(c) Description of benefit
1		
2		
3		
4		
5		

(d) Amount of prohibited benefit	(e) Tax on donors, donor advisors, or related persons (125% of col. (d)) (see instructions)	(f) Tax on fund managers (if applicable) (lesser of 10% of col. (d) or $10,000) (see instructions)

Part II Summary of Tax Liability of Donors, Donor Advisors, Related Persons, and Proration of Payments

(a) Names of donors, donor advisors, or related persons liable for tax	(b) Item no from Part I, col (a)	(c) Tax from Part I, col (e) or prorated amount	(d) Donor's, donor advisor's, or related person's total tax liability (add amounts in col (c)) (see instructions)

Part III Summary of Tax Liability of Fund Managers and Proration of Payments

(a) Names of fund managers liable for tax	(b) Item no from Part I, col (a)	(c) Tax from Part I, col (f) or prorated amount	(d) Fund manager's total tax liability (add amounts in col (c)) (see instructions)

Schedule M - Tax on Hospital Organization for Failure to Meet the Community Health Needs Assessment Requirements (Sections 4959 and 501(r)(3)) (See instructions.)

Part I Failures to Meet Section 501(r)(3)

(a) Item number	(b) Name of hospital facility	(c) Description of the failure	(d) Tax year hospital facility last conducted a CHNA	(e) Tax year hospital facility last adopted an implementation strategy
1				
2				
3				
4				
5				

Part II Computation of Tax

1	Number of hospital facilities operated by the hospital organization that failed to meet the Community Health Needs Assessment requirements of section 501(r)(3)	1	
2	Tax - Enter $50,000 multiplied by line 1 here and on Part I, line 12	2	

SCHEDULE N - Tax on Excess Executive Compensation (Section 4960). (See instructions.)

(a) Item number	(b) Name of covered employee	(c) Excess remuneration	(d) Excess parachute payment	(e) Total. Add column (c) and (d)
1				
2				
3				
4				
5				
6	Attachment, if necessary. See instructions			
Total (add column (e) items 1 - 6)				
Tax. Enter 21% of the amount above here and on Part I, line 13				

SCHEDULE O - Excise Tax on Net Investment Income of Private Colleges and Universities (Section 4968)

		(a) Name	(b) EIN	(c) Gross investment income (See instructions.)	(d) Capital gain net income	(e) Administrative expenses allocable to income included in cols. (c) and (d)	(f) Net investment income (See instructions.)
1	Filing Organization						
2	Related Organization						
3	Related Organization						
4	Related Organization						
5	Total from attachment, if necessary						
6	Total						
7	Excise Tax on Net Investment Income. Enter 1.4% of the amount in 6(f) here and on Part I, line 14						

Form 4720 (2019)

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 — Title: PRESIDENT — Date

Signature (and organization or entity name if applicable) of manager, self-dealer, disqualified person, donor, donor advisor, or related person — Date

Signature (and organization or entity name if applicable) of manager, self-dealer, disqualified person, donor, donor advisor, or related person — Date

Signature (and organization or entity name if applicable) of manager, self-dealer, disqualified person, donor, donor advisor, or related person — Date

Signature (and organization or entity name if applicable) of manager, self-dealer, disqualified person, donor, donor advisor, or related person — Date

May the IRS discuss this return with the preparer shown below? (see instructions) [X] Yes [ ] No

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check [ ] if self-employed	PTIN
BARRY KLARBERG	BARRY KLARBERG	11/16/20		P01493095
Firm's name ▶ MONARCH BUSINESS & WEALTH MGMT LLC			Firm's EIN ▶ 27-4125859	
Firm's address ▶ 209 E. 31ST STREET NEW YORK, NY 10016			Phone no. 212-894-8100	