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Form 990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

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

OMB No 1545-0047

2019

Open to Public Inspection

For calendar year 2019 or tax year beginning , 2019, and ending , 20

Name of foundation
Ametek Foundation, Inc.

A Employer identification number
13-6095939

Number and street (or P O box number if mail is not delivered to street address) | Room/suite
1100 Cassatt Road

B Telephone number (see instructions)
610-647-2121

City or town, state or province, country, and ZIP or foreign postal code
Berwyn, PA 19312

C If exemption application is pending, check here ▶ ☐

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

D 1. Foreign organizations, check here ▶ ☐

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

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

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

I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ $ 6,398,240.00

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

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

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

			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)	2,000,000 00			
	2	Check ▶ ☑ if the foundation is not required to attach Sch B				
	3	Interest on savings and temporary cash investments	101,307 00	101,307.00		
	4	Dividends and interest from securities				
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	55,586.00			
	b	Gross sales price for all assets on line 6a 1,250,977.00				
	7	Capital gain net income (from Part IV, line 2)		55,586.00		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less. Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)				
	12	**Total.** Add lines 1 through 11	2,156,893.00	156,893.00		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc				
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)				
	c	Other professional fees (attach schedule)	24,000.00	24,000.00		
	17	Interest				
	18	Taxes (attach schedule) (see instructions)				
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)				
	24	**Total operating and administrative expenses.** Add lines 13 through 23	24,000.00	24,000.00		
	25	Contributions, gifts, grants paid	2,041,691.00			
	26	**Total expenses and disbursements.** Add lines 24 and 25	2,065,691.00	24,000.00		
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	91,202.00			
	b	**Net investment income** (if negative, enter -0-)		132,893.00		
	c	**Adjusted net income** (if negative, enter -0-)				

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

			Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	23,420.00	8,874.00	8,874.00
	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	1,000,000 00	1,200,000.00	1,200,000 00
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶			
		Less allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U.S. and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	922,480 00	1,359,057 00	1,359,057.00
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach schedule) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	3,310,720.00	3,830,309.00	3,830,309 00
	14	Land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach schedule) ▶			
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	5,256,620.00	6,398,240.00	6,398,240.00
Liabilities	17	Accounts payable and accrued expenses	6,256.00	7,091.00	
	18	Grants payable	271,863.00	291,986.00	
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	**Total liabilities** (add lines 17 through 22)	278,119.00	299,077.00	
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			
	27	Paid-in or capital surplus, or land, bldg., and equipment fund			
	28	Retained earnings, accumulated income, endowment, or other funds			
	29	**Total net assets or fund balances** (see instructions)	4,978,501.00	6,099,163.00	
	30	**Total liabilities and net assets/fund balances** (see instructions)	5,256,620.00	6,398,240.00	

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	4,978,501 00
2	Enter amount from Part I, line 27a	2	91,202 00
3	Other increases not included in line 2 (itemize) ▶ Net unrealized gain on investments	3	1,029,460 00
4	Add lines 1, 2, and 3	4	6,099,163.00
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29	6	6,099,163.00

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	MISCELLANEOUS COMMON STOCK AND SECURITIES	P	VAR	VAR-2019
b				
c				
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))
a	1,250,977 00	0.00	1,195,391 00	55,586 00
b				
c				
d				
e				

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
	(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a				
b				
c				
d				
e				

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 / If (loss), enter -0- in Part I, line 7 }	2	55,586 00
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) See instructions. If (loss), enter -0- in Part I, line 8	3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☑ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2018	1,774,623.00	5,134,014 00	3457
2017	1,519,765 00	2,092,877.00	.7262
2016	1,663,413 00	1,752,908.00	9489
2015	1,465,108 00	2,695,545.00	.5435
2014	1,416,281 00	3,158,448.00	4484

2	**Total** of line 1, column (d)	2	3.0127
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	.60254
4	Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	4,980,183 00
5	Multiply line 4 by line 3	5	3,000,759.00
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	1,329.00
7	Add lines 5 and 6	7	3,002,088.00
8	Enter qualifying distributions from Part XII, line 4	8	2,065,691.00

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	0.00
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	2,658.00
3	Add lines 1 and 2	3	2,658.00
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)	4	0.00
5	**Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-	5	2,658.00
6	Credits/Payments		
a	2019 estimated tax payments and 2018 overpayment credited to 2019 — 6a		
b	Exempt foreign organizations—tax withheld at source — 6b		
c	Tax paid with application for extension of time to file (Form 8868) — 6c		
d	Backup withholding erroneously withheld — 6d		
7	Total credits and payments. Add lines 6a through 6d	7	0.00
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	0 00
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	2,658 00
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	0 00
11	Enter the amount of line 10 to be: **Credited to 2020 estimated tax** ▶ **Refunded** ▶	11	0 00

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		✔
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition	1b		✔
	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		✔
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation. ▶ $ _____ **(2)** On foundation managers. ▶ $ _____			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ _____			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.	2		✔
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		✔
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		✔
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		✔
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by *General Instruction T.*	5		✔
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	✔	
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	✔	
8a	Enter the states to which the foundation reports or with which it is registered. See instructions ▶ PENNSYLVANIA AND NEW YORK			
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	✔	
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		✔
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		✔

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		✔
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		✔
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	✔	
	Website address ▶ N/A			
14	The books are in care of ▶ ALEX WHITELAM Telephone no ▶ 610-889-5250			
	Located at ▶ 1100 CASSATT ROAD, BERWYN, PA ZIP+4 ▶ 19312-1177			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041**—check here ▶ ☐ and enter the amount of tax-exempt interest received or accrued during the year ▶ 15			
16	At any time during calendar year 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		✔
	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

			Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			
1a	During the year, did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☑ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☑ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☑ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☑ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☑ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☑ No			
b	If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b		✔
	Organizations relying on a current notice regarding disaster assistance, check here ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2019?	1c		✔
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):			
a	At the end of tax year 2019, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2019? ☐ Yes ☑ No			
	If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see instructions.)	2b		✔
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☑ No			
b	If "Yes," did it have excess business holdings in 2019 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969; **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019)	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		✔
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2019?	4b		✔

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

			Yes	No
5a	During the year, did the foundation pay or incur any amount to:			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☑ No			
	(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☑ No			
	(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☑ No			
	(4) Provide a grant to an organization other than a charitable, etc , organization described in section 4945(d)(4)(A)? See instructions ☐ Yes ☑ No			
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☑ No			
b	If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance? See instructions	5b		
	Organizations relying on a current notice regarding disaster assistance, check here ▶ ☐			
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☑ No			
	If "Yes," attach the statement required by Regulations section 53.4945-5(d)			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☑ No			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	6b		✔
	If "Yes" to 6b, file Form 8870.			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☑ No			
b	If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	7b		
8	Is the foundation subject to the section 4960 tax on payment(s) of more than $1,000,000 in remuneration or excess parachute payment(s) during the year? ☐ Yes ☑ No			

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE ATTACHED SCHEDULE				

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

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

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

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

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

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over $50,000 for professional services ▶		

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 NONE	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 NOT APPLICABLE	
2	
All other program-related investments See instructions 3	
Total. Add lines 1 through 3 ▶	

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes:		
a	Average monthly fair market value of securities	1a	5,056,023.00
b	Average of monthly cash balances	1b	0.00
c	Fair market value of all other assets (see instructions)	1c	
d	**Total** (add lines 1a, b, and c)	1d	5,056,023.00
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	5,056,023 00
4	Cash deemed held for charitable activities Enter 1½% of line 3 (for greater amount, see instructions)	4	75,840.00
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	4,980,183 00
6	**Minimum investment return.** Enter 5% of line 5	6	249,009 00

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	249,009.00
2a	Tax on investment income for 2019 from Part VI, line 5 2a		
b	Income tax for 2019. (This does not include the tax from Part VI.) 2b		
c	Add lines 2a and 2b	2c	
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	249,009.00
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	249,009.00
6	Deduction from distributable amount (see instructions)	6	
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	249,009 00

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes:		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26	1a	2,065,691 00
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes	2	
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	2,065,691.00
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b See instructions	5	
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	2,065,691.00

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				249,009.00
2	Undistributed income, if any, as of the end of 2019:				
a	Enter amount for 2018 only				
b	Total for prior years. 20 ___, 20 ___, 20 ___				
3	Excess distributions carryover, if any, to 2019				
a	From 2014 1,258,359.00				
b	From 2015 1,330,331.00				
c	From 2016 1,575,768.00				
d	From 2017 1,415,122.00				
e	From 2018 1,517,922.00				
f	**Total** of lines 3a through e	7,097,502.00			
4	Qualifying distributions for 2019 from Part XII, line 4 ▶ $ 2,065,691.00				
a	Applied to 2018, but not more than line 2a				
b	Applied to undistributed income of prior years (Election required—see instructions)				
c	Treated as distributions out of corpus (Election required—see instructions)				
d	Applied to 2019 distributable amount				
e	Remaining amount distributed out of corpus	1,816,682.00			
5	Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount must be shown in column (a).)				249,009.00
6	**Enter the net total of each column as indicated below:**				
a	Corpus Add lines 3f, 4c, and 4e. Subtract line 5	8,914,184.00			
b	Prior years' undistributed income. Subtract line 4b from line 2b				
c	Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d	Subtract line 6c from line 6b. Taxable amount—see instructions				
e	Undistributed income for 2018. Subtract line 4a from line 2a. Taxable amount—see instructions				
f	Undistributed income for 2019 Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020				
7	Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required—see instructions)				
8	Excess distributions carryover from 2014 not applied on line 5 or line 7 (see instructions)				
9	**Excess distributions carryover to 2020.** Subtract lines 7 and 8 from line 6a	8,914,184.00			
10	Analysis of line 9				
a	Excess from 2015 1,330,331.00				
b	Excess from 2016 1,575,768.00				
c	Excess from 2017 1,415,122.00				
d	Excess from 2018 1,517,922.00				
e	Excess from 2019 1,816,682.00				

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

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

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			(e) Total
	(a) 2019	(b) 2018	(c) 2017	(d) 2016	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
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).)

NOT APPLICABLE

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

NOT APPLICABLE

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

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

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

ALEX WHITELAM 1100 CASSATT ROAD, BERWYN,PA 19312-1177 610-889-5250

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

NO SPECIFIC INFORMATION FORMS REQUIRED

c Any submission deadlines.

NO DEADLINES

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

NO LIMIT OTHER THAN ENTITY MUST QUALIFY UNDER IRS CODE SECTION 501 (C)(3)

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* **SEE ATTACHED SCHEDULE**				2,041,691.00
Total ▶ **3a**				2,041,691.00
b *Approved for future payment*				
Total ▶ **3b**				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	Related or exempt function income (See instructions)
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					
4 Dividends and interest from securities					101,307.00
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					55,586 00
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory					
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)					156,893 00
13 **Total.** Add line 12, columns (b), (d), and (e)				13	156,893 00

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

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)
	ALL INCOME (LOSS) COMES FROM INVESTMENT OF CHARITABLE CONTRIBUTIONS AND IS DISBURSED FOR CHARITABLE 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)		✔
	(2) Other assets	1a(2)		✔
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		✔
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		✔
	(3) Rental of facilities, equipment, or other assets	1b(3)		✔
	(4) Reimbursement arrangements	1b(4)		✔
	(5) Loans or loan guarantees	1b(5)		✔
	(6) Performance of services or membership or fundraising solicitations	1b(6)		✔
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		✔

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

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

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

b If "Yes," complete the following schedule

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

Sign Here

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

Signature of officer or trustee	Date	Title
	9/9/2020	Secretary & Treasurer

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

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN

Firm's name ▶ | Firm's EIN ▶

Firm's address ▶ | Phone no

Page 1, Part 1, Line 16(c) - Other Professional Fees

Trustee/Bank Fees	24,000

(a) Name of officer	(b) Title and average hours per week devoted to position	(c) Compensaton	(d) Contributions to emplyee benefit plans and deferred compensation	(e) Expense account, other allowances
Directors				
David A Zapico 1100 Cassatt Rd Berwyn, PA 19312	Director As Required	0	0	0
Dennis K Williams 153 S Beach Rd Hobe Sound, FL 33455	Director As Required	0	0	0
Elizabeth R Varet P O Box 287440 New York, NY 10128	Director As Required	0	0	0
Officers				
David A Zapico 1100 Cassatt Rd Berwyn, PA 19312	President As Required	0	0	0
Elizabeth R Varet P O Box 287440 New York, NY 10128	Vice President As Required	0	0	0
Alex Whitelam 1100 Cassatt Rd Berwyn, PA 19312	Secretary & Treasurer As Required	0	0	0
Dennis K Williams 153 S Beach Rd Hobe Sound, FL 33455	Assistant Secretary/ Assistant Treasurer As Required	0	0	0

AMETEK FOUNDATION, INC
SCHEDULE OF DONATIONS
Twelve months ended December 31, 2019

	Total Charged to expense
General Welfare	
Abilities, Inc of Florida	$ 15,000
Ben Curtis Family Foundation	5,000
Blessback Worldwide	24,000
Byron Saunders Foundation	4,500
Camp Kesem	5,000
Clinch Valley Trail Alliance	5,000
Connecticut Food Bank	7,000
Cradles to Crayons	5,000
CYN Counseling Center	5,000
Devereux Foundation	7,500
Erica Pombrio Foundation	4,455
For Goodness Sake	2,000
For Pete's Sake Cancer Respite Foundation	1,500
Hauto Volunteer Fire Company	5,000
Helping Adults with Autism Perform and Excel	5,000
MAPI Foundation	5,000
Middlesex United Way	34,274
Monadnock United Way	5,261
Nesquehoning Hose Co #1	8,000
Old Colony YMCA	1,500
Optimist International Foundation	2,505
PARC Foundation Inc	5,000
The Philadelphia Foundation	20,000
Philanthropy Network of Great Philadelphia	5,250
PitCare Inc	5,000
Renaissance Faimily Center	10,000
Safe Haven of Greater Waterbury	5,000
Safe Harbor of Chester County	2,500
Schuylkill/Carbon Marine Corp League Toys for Tots	2,178
Science Explorer Inc	-
Paterson School District (School 27 Elementary)	92,598
Tulsa School District (Whitman Elementary)	79,775
Penn Bernville Elementary (Reading, PA)	66,020
Whitehall Elementary (Norristown, PA)	86,427
St Lucy's Auxiliary to the Blind	5,000
United Way of Auglaize County	2,216
United Way of Berks County	21,168
United Way of Broome County	6,258
United Way of Buffalo & Erie County	3,718
United Way of Dane County	11,789
United Way of Greater Greensboro	2,565
United Way of Greater Philadelphia and Southern New Jersey - Corporate	77,754
United Way of Greater Philadelphia and Southern New Jersey - DAZ match	49,000
United Way of Greater Philadelphia and Southern New Jersey	2,413
United Way of Greater Rochester	2,300
United Way of Greater Waterbury	12,077
United Way of Lebanon County	192
United Way of Portage County	23,519
United Way of San Luis Obispo County	2,848
United Way of Sanilac County	402
United Way of Schuylkill County	1,300
United Way of Southeastern Michigan	70
United Way of Southwestern Pennsylvania	2,498
United Way of Suncoast	1,560
United Way of the Plains	5,022
United Way of Tulsa Area	2,511
United Way of Ulster County	5,972
United Way of Washington County	7,077
Wichita Habitat for Humanity	10,000
Total General Welfare	796,472

AMETEK FOUNDATION, INC
SCHEDULE OF DONATIONS
Twelve months ended December 31, 2019

	Total Charged to expense
Education	
Alamance Community College Foundation, Inc	$ 5,000
Alana Maddox Memorial Scholarship - Drexel University	2,000
Arcadia University	5,000
Binghamaton University Foundation/Society of Women Engineers	5,000
Boston College	5,000
Boston University College of Engineering	15,000
California Polytechnic State University	5,000
ESL In-Home Program of Northern Nevada	1,000
Franklin Institute Science Museum - Corporate Partner Program	12,000
Georgia Tech Foundation - Georgia Tech Promise Scholarship	25,000
Hatboro Horsham Education Foundation	5,000
International STEM Scholarship	74,760
IYRS School of Technology & Trades	5,000
Lancaster Science Factory	10,000
LaSalle College High School	1,000
Mighty Writers	5,000
National Ment Scholarship Corp	66,630
National Society of Black Engineers	5,000
North Carolina A&T State University	20,000
North Wales Area Library	11,200
Northeastern University Society of Women Engineers	5,000
Notre Dame University	1,500
Panther Valley Elementary School - Playground	18,840
Penn State University - Abington Campus	2,500
Penn State University - Brandywine Campus	2,500
Penn State University Morgan Academic Ctr	5,000
Penn State University Open Doors Scholarship	9,353
Pennsylvania State University - Great Valley	10,000
Pennsylvania State University - College of Engineering	7,500
St Joseph's University - Haub School	2,500
Temple University - Fox School	1,000
Thurgood Marshall Center Trust	5,000
University of Pennsylvania, Track Team Fund	10,000
University of St Thomas	2,000
University of Southern California - School of Dramatic Arts	10,000
Villanova University School of Law	3,500
Vision to Learn	142,415
Wichita State University Foundation	30,000
Wichita State University Foundation - Women in Engineering Endowed Scholarship	12,000
Yale University Law School	5,000
100 Book Challenge	
Alamance Burlington School Dist Grove Park Elem (100 Book Challenge®)	90,775
Binghamton School Dist (100 Book Challenge®)	-
Panther Valley School Dist (100 Book Challenge®)	123,365
Sequoia Elementary School, San Diego (100 Book Challenge®)	60,580
Total Education	858,918
Medical Research and Care	
American Cancer Society	$ 6,129
American Heart Association	20,000
Crohns & Colitis Foundation	12,000
Juvenile Diabetes Research Foundation (JDRF)	39,772
Leukemia & Lymphoma Society	5,000
NCH Healthcare Foundation	10,000
Restore Addiction Recovery	2,000
Susan G Komen - Kansas	2,400
Total Medical Research and Care	97,301

AMETEK FOUNDATION, INC
SCHEDULE OF DONATIONS
Twelve months ended December 31, 2019

	Total Charged to expense
Youth Organizations	
Fiver Children's Foundation	$ 2,500
The First Tee of Greater Philadelphia	26,000
Girl Scouts of Eastern PA	2,500
The Little Bit Foundation	5,000
Total Youth Organizations	36,000
Hospitals	
City of Hope	$ 2,500
Mayo Clinic	20,000
Memorial Sloan-Kettering Cancer Center	30,000
MJHS Institute for Innovation In Palliative Care	15,000
Rady Children's Hospital - La Playa Unit	9,000
St Luke's Gnaden Huetten Campus	1,500
St Luke's Miners Memorial Medical Center	1,500
Total Hospitals	79,500
Other	
Able Flight	$ 5,000
American Society of Metals	6,000
Armstrong Air & Space Museum	10,000
Central Park Conservancy	25,000
City of Philadelphia Mural Arts Program	3,000
Delaware Valley Industrial Resource Center (DVIRC)	15,000
Franklin Institute Awards and Ceremony Dinner	10,000
The Greater Philadelphia Alliance for Capital and Technology	25,000
Make-A-Wish OKI	15,000
Philadelphia Hospitality	9,500
R E A C H	2,500
Women's Resource Center of the Delaware Valley	7,500
World Affairs Council of Philadelphia	40,000
Total Other	173,500
Total Donations	$ 2,041,691