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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 , 2019, and ending , 20

Name of foundation: THE LODESTAR FOUNDATION	A Employer identification number: 20-4480084
Number and street (or P O box number if mail is not delivered to street address): 4455 EAST CAMELBACK ROAD — Room/suite: #215A	B Telephone number (see instructions): (602) 956-2699
City or town, state or province, country, and ZIP or foreign postal code: PHOENIX, AZ 85018	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: [X] 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) ▶ $ 306,161. — 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 ▶ ☐

3A 6 04

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)	1,244,261.			
	2 Check ▶ ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	475.	475.		
	4 Dividends and interest from securities	3,094.	3,094.		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	39,240.			
	b Gross sales price for all assets on line 6a 972,450.				
	7 Capital gain net income (from Part IV, line 2)		605,769.		
	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	1,287,070.	609,338.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0.			
	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) [1]	14,685.			14,685.
	17 Interest				
	18 Taxes (attach schedule) (see instructions) [2]	8,664.			
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy	784.			784.
	21 Travel, conferences, and meetings	43,712.			43,712.
	22 Printing and publications	1,684.			1,684.
	23 Other expenses (attach schedule) ATCH 3	8,672.	120.		8,529.
	24 **Total operating and administrative expenses.** Add lines 13 through 23	78,201.	120.		69,394.
	25 Contributions, gifts, grants paid	1,020,433.			1,020,433.
	26 Total expenses and disbursements Add lines 24 and 25	1,098,634.	120.		1,089,827.
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	188,436.			
	b **Net investment income** (if negative, enter -0-)		609,218.		
	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)

	Line	Description	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			
	2	Savings and temporary cash investments	74,613.	51,998.	51,998.
	3	Accounts receivable ▶ Less allowance for doubtful accounts ▶			
	4	Pledges receivable ▶ Less allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ Less allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments - U S and state government obligations (attach schedule)			
	b	Investments - corporate stock (attach schedule) ATCH 4		211,051.	254,163.
	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)			
	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)	74,613.	263,049.	306,161.
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 (attach schedule)			
	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			
	27	Paid-in or capital surplus, or land, bldg, and equipment fund			
	28	Retained earnings, accumulated income, endowment, or other funds	74,613.	263,049.	
	29	**Total net assets or fund balances** (see instructions)	74,613.	263,049.	
	30	**Total liabilities and net assets/fund balances** (see instructions)	74,613.	263,049.	

Part III Analysis of Changes in Net Assets or Fund Balances

	Description	Line	Amount
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	74,613.
2	Enter amount from Part I, line 27a	2	188,436.
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	263,049.
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	263,049.

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)
1 a	SEE PART IV SCHEDULE			
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				
b				
c				
d				
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				
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 } 2 605,769.

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 0.

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	929,068.	135,139.	6.874907
2017	1,143,708.	180,755.	6.327393
2016	981,233.	122,620.	8.002226
2015	844,880.	78,084.	10.820142
2014	1,144,140.	107,148.	10.678127

2	**Total** of line 1, column (d)	2	42.702795
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	8.540559
4	Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	320,680.
5	Multiply line 4 by line 3	5	2,738,786.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	6,092.
7	Add lines 5 and 6	7	2,744,878.
8	Enter qualifying distributions from Part XII, line 4	8	1,089,827.

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	12,184.
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	
3	Add lines 1 and 2	3	12,184.
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	12,184.
6	Credits/Payments		
a	2019 estimated tax payments and 2018 overpayment credited to 2019 — 6a: 7,500.		
b	Exempt foreign organizations - tax withheld at source — 6b:		
c	Tax paid with application for extension of time to file (Form 8868) — 6c: 4,707.		
d	Backup withholding erroneously withheld — 6d:		
7	Total credits and payments Add lines 6a through 6d	7	12,207.
8	Enter any **penalty** for underpayment of estimated tax Check here ☒ if Form 2220 is attached	8	23.
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	
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 ▶ $ ______ (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		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?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? ATCH 5 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 ▶ AZ,			
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

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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 ▶ FOUNDATION SOURCE Telephone no ▶ 800-839-1754

Located at ▶ 501 SILVERSIDE ROAD, SUITE 123 WILMINGTON, DE ZIP+4 ▶ 19809-1377

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** - check here ▶ ☐

and enter the amount of tax-exempt interest received or accrued during the year ▶ | 15 |

			Yes	No
16	At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		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

			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		X
	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)	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)	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	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		X
	If "Yes" to 6b, file Form 8870			
7a	At any time during the tax year, was the foundation a party to a prohibited tax 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
ATCH 6		0.	0.	0.

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		0.

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 N/A	
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 NONE	
2	
All other program-related investments See instructions	
3 NONE	
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	230,438.
b	Average of monthly cash balances	1b	95,125.
c	Fair market value of all other assets (see instructions)	1c	
d	**Total** (add lines 1a, b, and c)	1d	325,563.
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	325,563.
4	Cash deemed held for charitable activities Enter 1 1/2 % of line 3 (for greater amount, see instructions)	4	4,883.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	320,680.
6	**Minimum investment return.** Enter 5% of line 5	6	16,034.

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	16,034.
2a	Tax on investment income for 2019 from Part VI, line 5	2a	12,184.		
b	Income tax for 2019 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	12,184.
3	Distributable amount before adjustments Subtract line 2c from line 1			3	3,850.
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	3,850.
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	3,850.

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	1,089,827.
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	1,089,827.
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	0.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	1,089,827.

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					3,850.
2 Undistributed income, if any, as of the end of 2019					
a Enter amount for 2018 only					
b Total for prior years 20 17 ,20 16 ,20 15					
3 Excess distributions carryover, if any, to 2019					
a From 2014	1,143,255.				
b From 2015	842,940.				
c From 2016	981,233.				
d From 2017	1,067,081.				
e From 2018	929,068.				
f Total of lines 3a through e		4,963,577.			
4 Qualifying distributions for 2019 from Part XII, line 4 ▶ $ 1,089,827.					
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					3,850.
e Remaining amount distributed out of corpus		1,085,977.			
5 Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount must be shown in column (a))					
6 **Enter the net total of each column as indicated below:**					
a Corpus Add lines 3f, 4c, and 4e Subtract line 5		6,049,554.			
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)		1,244,261.			
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		4,805,293.			
10 Analysis of line 9					
a Excess from 2015	741,934.				
b Excess from 2016	981,233.				
c Excess from 2017	1,067,081.				
d Excess from 2018	929,068.				
e Excess from 2019	1,085,977.				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9) NOT APPLICABLE

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			
	(a) 2019	(b) 2018	(c) 2017	(d) 2016	(e) Total
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))

I JEROME HIRSCH

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

N/A

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

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

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

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

c Any submission deadlines

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

Part XV Supplementary Information *(continued)*

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
ATCH 7				
Total . . . . ▶ **3a**				1,020,433.
b *Approved for future payment*				
Total . . . . ▶ **3b**				

JSA
9E1491 1 000

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	475.	
4 Dividends and interest from securities			14	3,094.	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	39,240.	
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)				42,809.	

13 Total. Add line 12, columns (b), (d), and (e) . . . . . 13 42,809.

(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)

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		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

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

Lois Savage | 10.28.2020 | President

Signature of officer or trustee | Date | Title

Lois Savage

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
JEFFREY D HASKELL	JEFFREY D HASKELL	10/14/2020		P01345770
Firm's name ▶ FOUNDATION SOURCE			Firm's EIN ▶510398347	
Firm's address ▶ ONE HOLLOW LN, STE 212 LAKE SUCCESS, NY 11042			Phone no 800-839-1754	

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
THE LODESTAR FOUNDATION

Employer identification number
20-4480084

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 THE LODESTAR FOUNDATION

Employer identification number 20-4480084

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	HIRSCH, I. JEROME 4455 E. CAMELBACK ROAD, #215A PHOENIX, AZ 85018	$ 1,244,261.	Person [X] Payroll [ ] Noncash [X] (Complete Part II for noncash contributions.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II for noncash contributions.)

Name of organization THE LODESTAR FOUNDATION

Employer identification number 20-4480084

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
1	HARRIS CORP DEL HRS, 1123 SH.	$ 184,537.	02/21/2019
1	CLOROX CO CLX, 977 SH.	$ 156,198.	03/18/2019
1	3M CO MMM, 737 SH.	$ 152,636.	03/18/2019
1	V F CORP VFC, 1963 SH.	$ 167,572.	03/18/2019
1	SPOTIFY TECHNOLOGY SA SPOT, 4138 SH.	$ 483,318.	09/25/2019
		$	

Name of organization THE LODESTAR FOUNDATION

Employer identification number 20-4480084

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

Use duplicate copies of Part III if additional space is needed

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

(e) Transfer of gift

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

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

(e) Transfer of gift

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

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

(e) Transfer of gift

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

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

(e) Transfer of gift

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

ATTACHMENT 1

FORM 990PF, PART I - OTHER PROFESSIONAL FEES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	CHARITABLE PURPOSES
PHILANTHROPIC CONSULTING SRVCS	14,685.	14,685.
TOTALS	14,685.	14,685.

ATTACHMENT 2

FORM 990PF, PART I - TAXES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS
990-PF ESTIMATED TAX FOR 2019	7,500.
990-PF EXCISE TAX FOR 2018	1,164.
TOTALS	8,664.

ATTACHMENT 3

FORM 990PF, PART I - OTHER EXPENSES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	CHARITABLE PURPOSES
ADMINISTRATIVE FEES	5,780.		5,780.
BANK CHARGES	120.	120.	
FOUNDATION DUES & MEMBERSHIPS	2,300.		2,300.
CREDIT CARD MISCELLANEOUS FEES	23.		
OFFICE SUPPLIES	25.		25.
STATE OR LOCAL FILING FEES	10.		10.
WEBSITE HOSTING/SUPPORT	364.		364.
CREDIT CARD ANNUAL FEE	50.		50.
TOTALS	8,672.	120.	8,529.

ATTACHMENT 4

FORM 990PF, PART II - CORPORATE STOCK

DESCRIPTION	ENDING BOOK VALUE	ENDING FMV
3M CO	37,486.	31,932.
SPOTIFY TECHNOLOGY SA	173,565.	222,231.
TOTALS	211,051.	254,163.

FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
		PUBLICLY-TRADED SECURITIES						
972,450.		366,681.					605,769.	
TOTAL GAIN(LOSS)							605,769.	

ATTACHMENT 5

FORM 990PF, PART VII-A - LIQUIDATION, TERMINATION, ETC. STATEMENT

AS EXPLAINED BELOW, THE FOUNDATION HAS NO PLANS FOR DISSOLUTION. THIS STATEMENT IS SUBMITTED TO REPORT THE DISTRIBUTION OF CERTAIN ASSETS DURING THE YEAR. THE DISTRIBUTIONS RESULTED IN A SUBSTANTIAL CONTRACTION OF ASSETS. THE FOLLOWING INFORMATION IS SUBMITTED IN ACCORDANCE WITH TREASURY REGULATION SECTION 1.6043-3(A)(1) AND THE FORM 990-PF INSTRUCTIONS: DURING THE TAXABLE YEAR ENDING DECEMBER 31, 2019, THE FOUNDATION MADE DISTRIBUTIONS FROM ASSETS FROM SOURCES OTHER THAN CURRENT INCOME. COLLECTIVELY, THE DISTRIBUTIONS IN EXCESS OF CURRENT INCOME TOTALED $1,020,433. THIS AMOUNT REPRESENTS 25% OR MORE OF THE FOUNDATION'S NET ASSETS OF $74,613 (AS MEASURED BY FAIR MARKET VALUE) AT THE BEGINNING OF THE FOUNDATION'S TAXABLE YEAR ENDING DECEMBER 31, 2019. ALTHOUGH THE FOUNDATION TECHNICALLY EXPERIENCED A SUBSTANTIAL CONTRACTION, IT WILL CONTINUE IN EXISTENCE AND HAS NO PLANS FOR DISSOLUTION. THE FOUNDATION MADE DISTRIBUTIONS OF CASH TO THE GRANTEES LISTED IN THE ATTACHMENT TO PART XV, LINE 3A; EACH SUCH GRANT WAS MADE SOLELY FOR THE CHARITABLE PURPOSE SPECIFIED THEREIN.

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

ATTACHMENT 5

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION	CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	EXPENSE ACCT AND OTHER ALLOWANCES
I JEROME HIRSCH 4455 EAST CAMELBACK ROAD #215A PHOENIX, AZ 85018	DIR, SEC 5.00	0.	0.	0.
LOIS SAVAGE 4455 EAST CAMELBACK ROAD #215A PHOENIX, AZ 85018	PRES 5.00	0.	0.	0.
	GRAND TOTALS	0.	0.	0.

The Lodestar Foundation
EIN: 20-4480084
Taxable Year Ending December 31, 2019

Form 990-PF, Part XIII, Line 7
Amount Treated as Distributions out of Corpus to Satisfy Section 170(b)(1)(F)(ii)

The Lodestar Foundation (the "Foundation") hereby elects to satisfy the requirements of Internal Revenue Code ("Code") Section 170(b)(1)(F)(ii) in respect of contributions of $100,000 and publicly traded securities with a value of $1,144,261 on the dates received in the taxable year ending December 31, 2019 (the "Conduit Election Year"). To satisfy the requirements of Code Section 170(b)(1)(F)(ii), a private non-operating foundation must: (A) by the end of the Conduit Election Year, distribute any undistributed income from the year immediately preceding the Conduit Election Year; (B) distribute, in the absence of an election under Code Section 4942(h)(2), any undistributed income from the Conduit Election Year by the end of the Conduit Election Year; and (C) make qualifying distributions treated as distributions out of corpus by no later than the 15th day of the third month of the taxable year following the Conduit Election Year in an amount equal to 100 percent of the contributions received by such foundation in the Conduit Election Year.

A. Satisfaction of Minimum Distribution Requirement for the Conduit Election Year. As reported on Part XIII, Line 2, column (c), the undistributed income for the year immediately preceding the Conduit Election Year is $0. In other words, the Foundation had no undistributed income for 2018.

B. Timely Satisfaction of Minimum Distribution Requirement for the Taxable Year following the Conduit Election Year. As reported on Part XIII, Line 6f, column (d), the undistributed income for the Conduit Election Year is $0. In other words, the Foundation had no undistributed income for 2019.

C. Sufficient Timely Qualified Distributions Made Out of Corpus. To satisfy the requirements of Internal Revenue Code Section 170(b)(1)(F)(ii), the Foundation had until March 15, 2020, the 15th day of the third month of the taxable year following the Conduit Election Year, to make distributions out of corpus in an amount equal to 100 percent of the contributions received by it in the Conduit Election Year, $1,244,261. As reported on Part XIII, Line 7, the Foundation is treating $1,244,261 as a current distribution out of corpus in full satisfaction of the requirements of Code Section 170(b)(1)(F)(ii) in respect of the Conduit Election Year. The Foundation has attached the necessary election, pursuant to Treasury Regulations Section 53.4942(a)-3(c)(2)(iv), to treat $1,244,261, of its unused prior years' corpus distributions, as a current distribution out of corpus.

The Lodestar Foundation
EIN: 20-4480084
Taxable Year Ending December 31, 2019

Form 990-PF, Part XIII, Line 7
Election to Treat Unused Prior Year Corpus Distributions as Current Year Corpus Distributions

Pursuant to Treasury Regulations Section 53.4942(a)-3(c)(2)(iv), The Lodestar Foundation hereby elects to treat, as a current distribution out of corpus, the following unused prior year's distributions that were treated as corpus distributions under Treasury Regulations Section 53 4942(a)-3(d)(1)(iii) in such prior tax year.

Tax Year	Amount
2014	$1,143,255
2015	$ 101,006

Signed: Lois Savage
Name Lois Savage
Title. President

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 7

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
ACT ONE 910 E OSBORN RD STE C PHOENIX, AZ 85014	N/A PC	GENERAL & UNRESTRICTED	5,000
AMERICAN FRIENDS OF FORUM 2000 INC 380 LEXINGTON AVE 17TH FL NEW YORK, NY 10168	N/A PC	GENERAL & UNRESTRICTED	25,000
ARIZONA COMMUNITY FOUNDATION - SOCIAL VENTURE PART 2201 E CAMELBACK RD, STE 405B PHOENIX, AZ 85016	N/A PC	GENERAL & UNRESTRICTED	5,500
ARIZONA GRANTMAKERS FORUM 2201 E CAMELBACK RD RM 405B PHOENIX, AZ 85016	N/A PC	GENERAL & UNRESTRICTED	2,500
ARIZONA STATE UNIVERSITY FOUNDATION FOR A NEW AMER PO BOX 2260 TEMPE, AZ 85280	N/A PC	GENERAL OPERATIONS FOR THE BENEFIT OF THE MCCAIN INSTITUTE	25,000
ARIZONA WOMENS BOARD 5921 E INDIAN BEND RD PARADISE VLY, AZ 85253	N/A PC	GENERAL & UNRESTRICTED	2,500

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 7 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
BARROW NEUROLOGICAL FOUNDATION 350 W THOMAS RD PHOENIX, AZ 85013	N/A PC	GENERAL & UNRESTRICTED	40,000
BRIDGE ALLIANCE EDUCATION FUND 214 S ALLEN ST STATE COLLEGE, PA 16801	N/A PC	CHARITABLE EVENT	5,000
BROPHY COLLEGE PREPARATORY 4701 N CENTRAL AVE PHOENIX, AZ 85012	N/A PC	GENERAL & UNRESTRICTED	2,000
CENTRAL ARIZONA SHELTER SERVICES INC 230 S 12TH AVE PHOENIX, AZ 85007	N/A PC	GENERAL & UNRESTRICTED	10,000
CITIZENS FOR RESPONSIBILITY AND ETHICS IN WASHINGT 1101 K ST NW WASHINGTON, DC 20005	N/A PC	GENERAL & UNRESTRICTED	25,000
COALITION FOR INTEGRITY INC 1023 15TH ST NW STE 300 WASHINGTON, DC 20005	N/A PC	CHARITABLE EVENT	50,000

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 7 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
COMMITTEE FOR A RESPONSIBLE FEDERAL BUDGET 1900 M ST NW STE 850 WASHINGTON, DC 20036	N/A PC	EDUCATING ON THE ROOT CAUSES OF DIVISION PHASE 1 PROJECT FUND	32,000
COMMUNITIES IN SCHOOLS OF THE CHARLESTON AREA INC 1691 TURNBULL AVE STE 200 N CHARLESTON, SC 29405	N/A PC	EXPLORATION OF A MERGER OF 3 SOUTH CAROLINA COMMUNITIES IN SCHOOLS ORGANIZATIONS INTC 1 STATEWIDE ENTITY	20,000
CRISIS ACTION INC 708 3RD AVE RM 1820 NEW YORK, NY 10017	N/A PC	PRODUCTION OF A VIDEO AND ACCOMPANYING INFOGRAPHICS FOR MARKETING, PROMOTIONAL AND EDUCATIONAL PURPOSES	27,500
EXPERIENCE MATTERS CONSORTIUM INC 360 E CORONADO RD STE 170 PHOENIX, AZ 85004	N/A PC	GENERAL & UNRESTRICTED	2,500
FJC 520 8TH AVE 20TH FL NEW YORK, NY 10018	N/A PC	GRANT TO PURCHASE AMPLIFIER FOR THE GIVING CIRCLE BACKBONE INFRASTRUCTURE	30,000
GLF GLOBAL LEADERSHIP FOUNDATION U SA 3030 CLARENDON BLVD 7TH FL ARLINGTON, VA 22201	N/A PC	GENERAL & UNRESTRICTED	25,000

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 7 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
INSTITUTE FOR EASTWEST STUDIES INC 155 E 44TH ST STE 1105 NEW YORK, NY 10017	N/A PC	GENERAL & UNRESTRICTED	10,000
K2 ADVENTURES FOUNDATION 20645 N PIMA RD STE 100 SCOTTSDALE, AZ 85255	N/A PC	GENERAL & UNRESTRICTED	5,000
LODESTAR DAY RESOURCE CENTER 1125 W JACKSON ST PHOENIX, AZ 85007	N/A PC	GENERAL & UNRESTRICTED	5,000
MCE SOCIAL CAPITAL 5758 GEARY BLVD #261 SAN FRANCISCO, CA 94121	N/A PC	GENERAL & UNRESTRICTED	7,56[illegible]
PHILANTHROPY FOR ACTIVE CIVIC ENGAGEMENT 1717 RHODE ISLAND AVE NW WASHINGTON, DC 20036	N/A PC	GRANT TO SUPPORT EXPANSION OF THE CIVIC ENGAGEMENT PRIMER IN CONJUNCTION WITH THE FUNDERS SUMMIT ON DEMOCRACY AND CIVIC LIFE	5,000
PHILANTHROPY FOR ACTIVE CIVIC ENGAGEMENT 1717 RHODE ISLAND AVE NW WASHINGTON, DC 20036	N/A PC	FUNDERS SUMMIT ON DEMOCRACY AND CIVIC LIFE	20,000

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 7 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
POLICY IMPACT 1107 9TH ST STE 500 SACRAMENTO, CA 95814	N/A PC	GENERAL SUPPORT OF THE PATRIOTS AND PRAGMATISTS PROGRAM	40,000
RENEW DEMOCRACY INITIATIVE INC PO BOX 20995 NEW YORK, NY 10025	N/A PC	GENERAL & UNRESTRICTED	60,000
RENEW DEMOCRACY INITIATIVE INC PO BOX 20995 NEW YORK, NY 10025	N/A PC	INTEGRITY NATION INITIATIVE	110,000
REPRESENT US EDUCATION FUND PO BOX 60008 FLORENCE, MA 01062	N/A PC	UNRIG SUMMIT NASHVILLE	25,000
SEACHANGE CAPITAL PARTNERS INC 1385 BROADWAY 23RD FL NEW YORK, NY 10018	N/A PC	EXPLORATION OF A MERGER BETWEEN KIVA AND WORKING CAPITAL FOR COMMUNITY NEEDS	7,778
SEACHANGE CAPITAL PARTNERS INC 1385 BROADWAY 23RD FL NEW YORK, NY 10018	N/A PC	EXPLORATION OF A MERGER BETWEEN THE MOUNTAIN INSTITUTE AND RARE	6,667

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 7 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
SEACHANGE CAPITAL PARTNERS INC 1385 BROADWAY 23RD FL NEW YORK, NY 10018	N/A PC	EXPLORATION OF A MERGER OF THE AMERICAN ACADEMY OF HOME CARE MEDICINE AND THE HOME CENTERED CARE INSTITUTE	8,889
SEACHANGE CAPITAL PARTNERS INC 1385 BROADWAY 23RD FL NEW YORK, NY 10018	N/A PC	EXPLORATION OF A MERGER OF THE DEMPSEY CENTERS FOR QUALITY CANCER CARE AND THE CANCER COMMUNITY CENTER	13,333
SEACHANGE CAPITAL PARTNERS INC 1385 BROADWAY 23RD FL NEW YORK, NY 10018	N/A PC	MERGER OF COLLEGE POSSIBLE AND COLLEGE ACCESS NOW	8,444
SEACHANGE CAPITAL PARTNERS INC 1385 BROADWAY 23RD FL NEW YORK, NY 10018	N/A PC	MERGER OF EMMANUEL HOUSE AND JOSEPH CORPORATION	4,444
SEACHANGE CAPITAL PARTNERS INC 1385 BROADWAY 23RD FL NEW YORK, NY 10018	N/A PC	MERGER OF INVEST IN GIRLS AND COUNCIL FOR ECONOMIC EDUCATION	15,111.
SEACHANGE CAPITAL PARTNERS INC 1385 BROADWAY 23RD FL NEW YORK, NY 10018	N/A PC	MERGER OF REGIONAL YOUTH ADULT SOCIAL ACTION PARTNERSHIP, COMMUNITIES4ACTION AND HEALTHY MINDS CONNECTICUT/SOUTHWEST REGIONAL MENTAL HEALTH BOARD	5,333.

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 7 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
SEACHANGE CAPITAL PARTNERS INC 1385 BROADWAY 23RD FL NEW YORK, NY 10018	N/A PC	MERGER OF THE ARC NEW LONDON COUNTY AND THE ARC QUINEBAUG VALLEY	8,889
SEACHANGE CAPITAL PARTNERS INC 1385 BROADWAY 23RD FL NEW YORK, NY 10018	N/A PC	MERGER OF THE BONNIE J ADDARIO LUNG CANCER FOUNDATION AND THE LUNG CANCER ALLIANCE	8,889
SEACHANGE CAPITAL PARTNERS INC 1385 BROADWAY 23RD FL NEW YORK, NY 10018	N/A PC	NYMAC FUND RENEWAL GRANT	25,000
SEACHANGE CAPITAL PARTNERS INC 1385 BROADWAY 23RD FL NEW YORK, NY 10018	N/A PC	ANNUAL ADMINISTRATIVE GRANT	175,000
SEACHANGE CAPITAL PARTNERS INC 1385 BROADWAY 23RD FL NEW YORK, NY 10018	N/A PC	EXPLORATION OF A MERGER OF NEW HAVEN LAND TRUST AND NEW HAVEN FARMS	8,089
STAND UP IDEAS INC 1140 3RD ST NE WASHINGTON, DC 20003	N/A PC	2019 NATIONAL SUMMIT FOR DEMOCRACY CONVENING	35,000

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 7 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
SYNERGOS INSTITUTE INC 3 E 54TH ST 14TH FL NEW YORK, NY 10022	N/A PC	GENERAL & UNRESTRICTED	25,000
TESSERACT RESEARCH CENTER INC 1701 K ST NW STE 750 WASHINGTON, DC 20006	N/A PC	PATRIOTIC MILLIONAIRES GENERAL OPERATIONS FUND	10,000
THE NISKANEN CENTER INC 820 1ST ST NE STE 675 WASHINGTON, DC 20002	N/A PC	GENERAL & UNRESTRICTED	25,000
VALLEY LEADERSHIP CORPORATION 910 E OSBORN RD STE A PHOENIX, AZ 85014	N/A PC	GENERAL & UNRESTRICTED	7,500
		TOTAL CONTRIBUTIONS PAID	1,020,433