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Form 990-PF

OMB No. 1545-0047

2019

Department of the Treasury  
Internal Revenue ServiceReturn 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](http://www.irs.gov/Form990PF) for instructions and the latest information.

For calendar year 2019 or tax year beginning 2019, and endingD'OLIER FOUNDATION  
161 FOXWOOD DRIVE  
MOORESTOWN, NJ 08057-4107

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

H Check type of organization:  Section 501(c)(3) exempt private foundation 04  
 Section 4947(a)(1) nonexempt charitable trust  Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, column (c), line 15) \$ 3,054,515. J Accounting method.  Cash  Accrual  
 Other (specify) (Part I, column (d), must be on cash basis.)

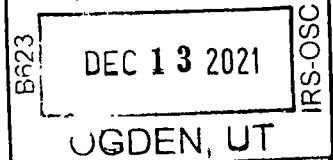
A Employee identification number  
22-6075471  
B Telephone number (see instructions)  
(610) 293-0700  
C If exemption application is pending, check here.   
D 1 Foreign organizations, check here   
2 Foreign organizations meeting the 85% test, check here and attach computation   
E If private foundation status was terminated under section 507(b)(1)(A), check here   
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)
	1 Contributions, gifts, grants, etc. received (attach schedule) <u>3/4</u>				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	258.	258.	258.	
	4 Dividends and interest from securities	45,204.	45,204.	45,204.	
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	24,737.			
	b Gross sales price for all assets on line 6a	<u>76,474.</u>			
	7 Capital gain net income (from Part IV, line 2)		24,737.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales loss				
	b 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	<u>70,199.</u>	<u>70,199.</u>	<u>45,462.</u>	
	13 Compensation of officers, directors, trustees, etc.	<u>7,245.</u>			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach sch.)				
	c Other professional fees (attach sch.) SEE STM 1	<u>16,149.</u>	<u>16,149.</u>	<u>16,149.</u>	<u>16,149.</u>
	17 Interest				
	18 Taxes (attach schedule) SEE STM 2	<u>614.</u>			
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)				
	SEE STATEMENT 3	<u>338.</u>			
	24 Total operating and administrative expenses. Add lines 13 through 23	<u>24,346.</u>	<u>16,149.</u>	<u>16,149.</u>	<u>16,149.</u>
	25 Contributions, gifts, grants paid PART XV	<u>137,000.</u>			<u>137,000.</u>
	26 Total expenses and disbursements. Add lines 24 and 25	<u>161,346.</u>	<u>16,149.</u>	<u>16,149.</u>	<u>153,149.</u>
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	<u>-91,147.</u>			
	b Net investment income (if negative, enter -0-)		<u>54,050.</u>		
	c Adjusted net income (if negative, enter -0-)			<u>29,313.</u>	

BAA For Paperwork Reduction Act Notice, see instructions.

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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
	1 Cash – non-interest-bearing				
	2 Savings and temporary cash investments		95,529.	44,992.	44,992.
	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 sch)				
	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)		960,872.	920,742.	3,009,523.
	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)	614.			
	16 Total assets (to be completed by all filers – see the instructions. Also, see page 1, item I)	1,057,015.	965,734.	3,054,515.	
	17 Accounts payable and accrued expenses				
	18 Grants payable				
	19 Deferred revenue				
	20 Loans from officers, directors, trustees, & 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.		
	Foundations that follow FASB ASC 958, check here and complete lines 24, 25, 29, and 30.	<input type="checkbox"/>			
	24 Net assets without donor restrictions				
	25 Net assets with donor restrictions				
	Foundations that do not follow FASB ASC 958, check here and complete lines 26 through 30.	<input checked="" type="checkbox"/>			
	26 Capital stock, trust principal, or current funds	1,039,017.	1,039,017.		
	27 Paid-in or capital surplus, or land, bldg., and equipment fund				
	28 Retained earnings, accumulated income, endowment, or other funds	17,998.	-73,283.		
	29 Total net assets or fund balances (see instructions)	1,057,015.	965,734.		
	30 Total liabilities and net assets/fund balances (see instructions)	1,057,015.	965,734.		

## 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	1,057,015.
2 Enter amount from Part I, line 27a	2	-91,147.
3 Other increases not included in line 2 (itemize)	3	
4 Add lines 1, 2, and 3	4	965,868.
5 Decreases not included in line 2 (itemize) ► SEE STATEMENT 4	5	134.
6 Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 29	6	965,734.

**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 CLASS ACTION PROCEEDS		P	VARIOUS	6/03/19
b 50 SHS AUTOZONE INC		P	7/18/17	10/23/19
c 200 SHS CELGENE CORP		P	7/18/17	11/21/19
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 26.			26.	
b 54,706.		24,871.	29,835.	
c 21,742.		26,866.	-5,124.	
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				(i) 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			26.	
b			29,835.	
c			-5,124.	
d				
e				
2 Capital gain net income or (net capital loss). <span style="border: 1px solid black; padding: 2px;">If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7</span>			2	24,737.
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. <span style="border: 1px solid black; padding: 2px;">If (loss), enter -0- in Part I, line 8.</span>			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	169,111.	2,721,917.	0.062129
2017	154,408.	2,606,400.	0.059242
2016	143,269.	2,473,096.	0.057931
2015	126,932.	2,575,485.	0.049285
2014	132,063.	2,518,801.	0.052431

2 Total of line 1, column (d).	2	0.281018
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	0.056204
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	2,852,441.
5 Multiply line 4 by line 3	5	160,319.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	541.
7 Add lines 5 and 6.	7	160,860.
8 Enter qualifying distributions from Part XII, line 4.	8	153,149.

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)**1 a Exempt operating foundations described in section 4940(d)(2), check here  and enter 'N/A' on line 1Date 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 2b

c All other domestic foundations enter 2% of line 2b. 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-)

3 Add lines 1 and 2

4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)

5 Tax based on Investment Income. Subtract line 4 from line 3. If zero or less, enter -0-

6 Credits/Payments:

a 2019 estimated tax paid and 2018 overpayment credited to 2019

6a  612

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  6128 Enter any penalty for underpayment of estimated tax. Check here  if Form 2220 is attached

SEE STATEMENT 5

8  12

9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed

9  481

10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid

10  Refunded

11 Enter the amount of line 10 to be Credited to 2020 estimated tax

11 **Part VII: Statements Regarding Activities**

1 a 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  Yes  Nob Did it spend more than \$100 during the year (either directly or indirectly) for political purposes?  
See the instructions for the definition.1b  Yes  No

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.

1c  Yes  No

c Did the foundation file Form 1120-POL for this year?

d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:

(1) On the foundation  \$ 0 (2) On foundation managers  \$ 0e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers  \$ 0

2 Has the foundation engaged in any activities that have not previously been reported to the IRS?

If 'Yes,' attach a detailed description of the activities.

2  Yes  No

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  Yes  No

4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?

4a  Yes  No

b If 'Yes,' has it filed a tax return on Form 990-T for this year?

4b  Yes  No

5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?

5  Yes  No

If 'Yes,' attach the statement required by General Instruction T.

6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:

6  Yes  No

• 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?

7  Yes  No

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

8 a Enter the states to which the foundation reports or with which it is registered. See instructions

N/A

8b  Yes  No

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.

9  Yes  No

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.

10  Yes  No

10 Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses

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SEE STATEMENT 6

**Part VII-B Statements Regarding Activities (continued)**

11	Yes	No
11	<input checked="" type="checkbox"/>	
12	Yes	No
12	<input checked="" type="checkbox"/>	
13	Yes	No
13	<input checked="" type="checkbox"/>	
Website address. ► <a href="http://WWW.DOLIERFOUNDATION.ORG">WWW.DOLIERFOUNDATION.ORG</a>		
14	Telephone no.	610-293-0700
Located at ► 175 STRAFFORD AVE, #210 WAYNE PA ZIP + 4 ► 19087-3332		
15	N/A	► <input type="checkbox"/>
15	N/A	
16	Yes	No
16	<input checked="" type="checkbox"/>	
See the instructions for exceptions and filing requirements for FinCEN Form 114. If 'Yes,' enter the name of the foreign country ►		

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

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

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**Part V: Statements Regarding Activities for Which Form 4720 May Be Required (continued)**

5 a 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

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).

N/A

6 a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

If 'Yes' to 6b, file Form 8870.

 Yes  No7 a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?  Yes  Nob If 'Yes,' did the foundation receive any proceeds or have any net income attributable to the transaction?  Yes  No8 Is the foundation subject to the section 4950 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
WALTER L. EVANS 62 MEDFORD LEAS MEDFORD, NJ 08055	TRUSTEE 0.50	1,500.	0.	0.
MARY ANNE POLK O'MEARA 161 FOXWOOD DRIVE MORESTOWN, NJ 08057-4107	TRUSTEE 5.00	3,000.	0.	0.
RAMONA THOMAS 680 MEDFORD LEAS MEDFORD, NJ 08055	TRUSTEE 0	1,373.	0.	0.
WILLIAMM GUTHE 425 LINDEN STREET, APT. B MORESTOWN, NJ 08057	TRUSTEE 0.50	1,372.	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  0

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**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.....		C

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	N/A	
2		

All other program-related investments. See instructions.

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	2,796,454.
b	Average of monthly cash balances	1b	99,425.
c	Fair market value of all other assets (see instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	2,895,879.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	2,895,879.
4	Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	43,438.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,852,441.
6	Minimum Investment return. Enter 5% of line 5	6	142,622.

**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	142,622.
2a	Tax on investment income for 2019 from Part VI, line 5	2a	1,081.
b	Income tax for 2019. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	1,081.
3	Distributable amount before adjustments Subtract line 2c from line 1	3	141,541.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	141,541.
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	141,541.

**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	153,149.
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	153,149.
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	153,149.

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. ....				141,541.
2 Undistributed income, if any, as of the end of 2019.			0.	
a Enter amount for 2018 only		0.		
b Total for prior years: 20, 20, 20		0.		
3 Excess distributions carryover, if any, to 2019:				
a From 2014. ....	12,885.			
b From 2015. ....	865.			
c From 2016. ....	20,992.			
d From 2017. ....	24,782.			
e From 2018. ....	36,903.			
f Total of lines 3a through e. ....	96,427.			
4 Qualifying distributions for 2019 from Part XII, line 4: ► \$ 153,149.			0.	
a Applied to 2018, but not more than line 2a.		0.		
b Applied to undistributed income of prior years (Election required - see instructions) ....		0.		
c Treated as distributions out of corpus (Election required - see instructions) ....	0.			
d Applied to 2019 distributable amount ....				141,541.
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2019. (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5. ....	11,608.			
b Prior years' undistributed income. Subtract line 4b from line 2b. ....	108,035.			
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed. ....	0.			
d Subtract line 6c from line 6b. Taxable amount - see instructions. ....	0.			
e Undistributed income for 2018. Subtract line 4a from line 2a. Taxable amount - see instructions. ....	0.			
f Undistributed income for 2019. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020. ....				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions). ....	0.			
8 Excess distributions carryover from 2014 not applied on line 5 or line 7 (see instructions). ....	12,885.			
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a	95,150.			
10 Analysis of line 9				
a Excess from 2015. ....	865.			
b Excess from 2016. ....	20,992.			
c Excess from 2017. ....	24,782.			
d Excess from 2018. ....	36,903.			
e Excess from 2019. ....	11,608.			

BAA

Form 990-PF (2019)

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

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2019, enter the date of the ruling	>			
1 b Check box to indicate whether the foundation is a private operating foundation described in section <input type="checkbox"/> 4942(j)(3) or <input checked="" type="checkbox"/> 4942(j)(5)				
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed				
2 b 85% of line 2a				
2 c Qualifying distributions from Part XII, line 4, for each year listed				
2 d Amounts included in line 2c not used directly for active conduct of exempt activities				
2 e Qualifying distributions made directly for active conduct of exempt activities				
2 f Subtract line 2d from line 2c				
3 g Complete 3a, b, or c for the alternative test relied upon:				
3 a 'Assets' alternative test — enter:				
3 (1) Value of all assets				
3 (2) Value of assets qualifying under section 4942(j)(3)(B)(i)				
3 b 'Endowment' alternative test — enter 2/3 of minimum investment return shown in Part X, line 6, for each year listed				
3 c 'Support' alternative test — enter:				
3 (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)				
3 (2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(ii)				
3 (3) Largest amount of support from an exempt organization				
3 (4) Gross investment income				

**Part XVI. Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year — see instructions.)****1 Information Regarding Foundation Managers:**

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

NONE

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

NONE

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

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

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

**SEE STATEMENT 7**

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

**SEE STATEMENT FOR LINE 2A**

c Any submission deadlines:

**SEE STATEMENT FOR LINE 2A**

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

**SEE STATEMENT FOR LINE 2A**

**Part V Supplementary Information (continued)****3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>Name and address (home or business)</b>				
<b>a Paid during the year</b>				
<b>SEE STATEMENT 8</b>				
<b>Total</b>				► 3a 137,000.
<b>b Approved for future payment</b>				
<b>Total</b>				► 3b
<b>BAA</b>	TEEA0301L 08/22/19			

**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) Exclu- sion 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	258.	
4 Dividends and interest from securities			14	45,204.	
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					24,737.
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)				45,462.	24,737.
13 Total. Add line 12, columns (b), (d), and (e)				13	70,199.

(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.)
N/A	

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

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	1 a (1)	X
(2) Other assets	1 a (2)	X
<b>b Other transactions:</b>		
(1) Sales of assets to a noncharitable exempt organization	1 b (1)	X
(2) Purchases of assets from a noncharitable exempt organization	1 b (2)	X
(3) Rental of facilities, equipment, or other assets.	1 b (3)	X
(4) Reimbursement arrangements.	1 b (4)	X
(5) Loans or loan guarantees	1 b (5)	X
(6) Performance of services or membership or fundraising solicitations	1 b (6)	X
<b>c Sharing of facilities, equipment, mailing lists, other assets, or paid employees</b>	1 c	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.

**2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527? . . . . .

Yes  No

**b** If 'Yes,' complete the following schedule.

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

Sign  
Up

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.

### Supplements

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→ TRUSTEE

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May the IRS discuss  
this return with the  
preparer shown below?  
See instructions.

**Paid  
Preparer  
Use Only**

Signature of officer or trustee		Date	TRUSTEE	See instructions <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
<b>Paid Preparer Use Only</b>	Print/Type preparer's name		Preparer's signature	Date	Check <input type="checkbox"/> if self-employed
	<b>GEOFFREY D. BEUCLER</b>		<i>Geoffrey D. Becler</i>	<i>10/21/20</i>	<b>PIN</b> <b>P00838905</b>
	Firm's name	► <b>BEUCLER KELLY &amp; IRWIN LTD.</b>			Firm's EIN ► <b>23-2371615</b>
Firm's address	<b>125 STRAFFORD AVE STE 116 WAYNE, PA 19087-3388</b>			Phone no.	<b>(610) 688-3200</b>

**BAA**

**2019****FEDERAL STATEMENTS****PAGE 1****D'OLIER FOUNDATION****22-6075471****STATEMENT 1**  
**FORM 990-PF, PART I, LINE 16C**  
**OTHER PROFESSIONAL FEES**

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT ADVISORY FEES	\$ 16,149.	\$ 16,149.	\$ 16,149.	\$ 16,149.
TOTAL	<u>\$ 16,149.</u>	<u>\$ 16,149.</u>	<u>\$ 16,149.</u>	<u>\$ 16,149.</u>

**STATEMENT 2**  
**FORM 990-PF, PART I, LINE 18**  
**TAXES**

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
EXCISE TAX	\$ 614.	\$ 0.	\$ 0.	\$ 0.
TOTAL	<u>\$ 614.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>

**STATEMENT 3**  
**FORM 990-PF, PART I, LINE 23**  
**OTHER EXPENSES**

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
OFFICE EXPENSES	\$ 338.	\$ 0.	\$ 0.	\$ 0.
TOTAL	<u>\$ 338.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>

**STATEMENT 4**  
**FORM 990-PF, PART III, LINE 5**  
**OTHER DECREASES**

BASIS ADJUSTMENT	\$ 134.
TOTAL	<u>\$ 134.</u>

**STATEMENT 5**  
**FORM 990-PF, PART VI, PENALTY AND INTEREST**  
**BALANCE DUE**

TAX DUE	\$ 481.
LATE PAYMENT PENALTY	9.
LATE INTEREST	4.
TOTAL	<u>\$ 494.</u>

2019

FEDERAL STATEMENTS

PAGE 2

D'OLIER FOUNDATION

22-6075471

**STATEMENT 6**  
**FORM 990-PF**  
**REASONABLE CAUSE FROM LATE PENALTIES**

DUE TO A CHANGE IN TRUSTEES, CHARLES SCHWAB ISSUED A NEW ACCOUNT NUMBER. WHEN THE ORGANIZATION WENT TO FILE THE EXTENSION AND MAKE A PAYMENT THROUGH THE ELECTRONIC FEDERAL TAX PAYMENT SYSTEM (EFTPS), THE OLD ACCOUNT NUMBER WAS STILL LINKED AND THE EXTENSION WAS INADVERTANTLY SUBMITTED WITH THE OLD ACCOUNT NUMBER. ACCORDINGLY, SINCE THIS ACCOUNT NUMBER WAS NO LONGER VALID, THE PAYMENT WAS NOT PROCESS AND THE EXTENSION WAS NOT REFLECTED AS BEING ACCEPTED. THE ORGANIZATION HAS SUBSEQUENTLY CORRECT THE LINKED ACCOUNT.

**STATEMENT 7**  
**FORM 990-PF, PART XV, LINE 2A-D**  
**APPLICATION SUBMISSION INFORMATION**

NAME OF GRANT PROGRAM:

NAME: MARY ANNE POLK O'MEARA

CARE OF:

STREET ADDRESS: 161 FOXWOOD DRIVE  
CITY, STATE, ZIP CODE: MOORESTOWN, NJ 08057-4107

TELEPHONE: (610) 293-0700

E-MAIL ADDRESS: TRUSTEES@DOLIERFOUNDATION.ORG

FORM AND CONTENT: PROJECT PROPOSAL SHOULD BE SUBMITTED VIA E-MAIL (TRUSTEES@DOLIERFOUNDATION.ORG) AND SHOULD INCLUDE A COVER LETTER AND PROPOSED BUDGET. A SINGLE COPY OF YOUR LATEST AUDITED FINANCIAL STATEMENTS AND YOUR IRS 501(C)(3) DETERMINATION LETTER SHOULD ALSO BE INCLUDED AS AN ATTACHMENT TO THE EMAIL. IN ADDITION, TWO HARD COPIES OF THE APPLICATION (WITHOUT ATTACHMENTS) MUST BE MAILED TO THE FOLLOWING ADDRESS:

161 FOXWOOD DRIVE  
MOORESTOWN, NJ 08057

SEE [HTTP://FDNWEB/DOLIER//APPLY](http://FDNWEB/DOLIER//APPLY) FOR UPDATES AND FURTHER INFORMATION.

SUBMISSION DEADLINES: SEPTEMBER 30

RESTRICTIONS ON AWARDS: GRANTS ARE MADE ONLY TO 501(C)(3) ORGANIZATIONS. NO GRANTS ARE MADE TO INDIVIDUALS.

THE MISSION OF THE FOUNDATION IS TO FULFILL THE EXPECTATIONS OF MABEL D'OLIER'S TRUST BY MAKING GRANTS TO QUAKER RELATED ORGANIZATIONS PRIMARILY IN THE SOUTH JERSEY AREA OR NON-QUAKER ORGANIZATIONS THAT EFFECTIVELY SUPPORT QUAKER CONCERNs.

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## FEDERAL STATEMENTS

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D'OLIER FOUNDATION

22-6075471

**STATEMENT 8**  
**FORM 990-PF, PART XV, LINE 3A**  
**RECIPIENT PAID DURING THE YEAR**

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
PHILADELPHIA YEARLY MEETING 1515 CHERRY STREET PHILADELPHIA PA 19102			YOUNG ADULT PROGRAM	\$ 2,500.
MOORESTOWN FRIENDS SCHOOL 110 EAST MAIN ST MOORESTOWN NJ 08057			SUPPORT OF CAMDEN SCHOLARS PROGRAM	10,000.
MOORESTOWN FRIENDS MEETING 118 EAST MAIN ST MOORESTOWN NJ 08057			LEAD GIFT FOR CAPITAL CAMPAIGN	25,000.
MT LAUREL MEETING C/O MRSTWN MTG 118 E MAIN ST MOORESTOWN NJ 08057			BUILDING REPAIRS	7,000.
MOORESTOWN MEETING 118 EAST MAIN ST MOORESTOWN NJ 08057			FRIENDS ENRICHMENT PROGRAM SCHOLARSHIPS FOR CAMP, MUSIC AND OTHER LESSONS	5,000.
AMERICAN FRIENDS SERVICE COM 1501 CHERRY STREET PHILADELPHIA PA 19102			TWIN CITIES (MN) HEALING JUSTICE PROGRAM	1,000.
CAMP DARK WATERS P.O. BOX 263 MEDFORD NJ 08055			SUPPORT WINTERIZATION AND FINISH OF A YEAR-ROUND STAFF CABIN	4,000.
FCNL EDUCATION FUND 245 SECOND ST, NE WASHINGTON DC 20002			GENERAL PROGRAM SUPPORT	2,500.
FRIENDS SCHOOL 15 HIGH STREET MULLICA HILL NJ 08062			SUPPORT REMOVAL AND REPLACEMENT OF CONTAMINATED GYMNASIUM FLOOR	4,000.
JOHN WOOLMAN ASSOCIATION 99 BRANCH STREET MT. HOLLY NJ 08060			SUPPORT CREATION OF PRESERVATION PLAN AND MASTER PLAN TO RESTORE GARDENS AND PROPERTY	9,000.

2019

## FEDERAL STATEMENTS

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D'OLIER FOUNDATION

22-6075471

STATEMENT 8 (CONTINUED)  
 FORM 990-PF, PART XV, LINE 3A  
 RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
MEDFORD LEAS ONE MEDFORD LEAS WAY MEDFORD NJ 08055			UPGRADE AUDIO EQUIPMENT	\$ 7,000.
ALICE PAUL INSTITUTE- PO BOX 1376 MT. LAUREL NJ 08054			"MEETING ALICE" - SCHOOL ASSEMBLY PILOT PROGRAM	1,500.
MOORESTOWN VISITING NURSES ASSOCIATION 300 HARPER DRIVE MOORESTOWN NJ 08057			OFFSETTING COST OF CHARITABLE CARE	2,000.
PERKINS CENTER FOR THE ARTS 395 KINGS HIGHWAY MOORESTOWN NJ 08057			GENERAL OPERATING SUPPORT	10,000.
PLANNED PARENTHOOD OF N, CENTRAL, & S NJ 317 S BROADWAY CAMDEN NJ 08103			SEXUALITY EDUCATION AND TRAINING PROGRAMS	5,000.
PROVIDENCE HOUSE 595 RANCOCAS ROAD WESTAMPTON NJ 08060			FOOD FOR RESIDENTS	2,000.
THE TENDER, INC 4501 CHURCH ROAD MT LAUREL NJ 08054			MASSAGE THERAPY FOR THE ELDERLY	4,000.
HABITAT FOR HUMANITY 530 ROUTE 38 MAPLE SHADE NJ 08052			PURCHASE MATERIALS FOR CONSTRUCTION OF HOMES IN BURLINGTON COUNTY IN SUPPORT OF HABITAT FOR HUMANITY OF BURLINGTON COUNTY AND GREATER TRENTON-PRINCETO N	7,500.
SAMARITAN HEALTHCARE & HOSPICE 5 EVES DRIVE, SUITE 101 MARLTON NJ 08053			FIVE WISHES END OF LIFE PLANNING BOOKLET	2,000.

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## FEDERAL STATEMENTS

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D'OLIER FOUNDATION

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**STATEMENT 8 (CONTINUED)**  
**FORM 990-PF, PART XV, LINE 3A**  
**RECIPIENT PAID DURING THE YEAR**

<u>NAME AND ADDRESS</u>	<u>DONEE RELATIONSHIP</u>	<u>FOUND- ATION STATUS</u>	<u>PURPOSE OF GRANT</u>	<u>AMOUNT</u>
FRIENDS WORLD COMMITTEE FOR CONSULTATION 1506 RACE STREET PHILADELPHIA PA 19102			SECTION OF THE AMERICAS - SUPPORT TRAINING RETREAT FOR TRAVELLING MINISTERS	\$ 1,500.
FRIENDS GENERAL CONFERENCE 1216 ARCH STREET, #2B PHILADELPHIA PA 19107			SUPPORT QUAKER LEADERSHIP DEVELOPMENT AMONG YOUTH AND ADULT FRIENDS	2,000.
HADDONFIELD FRIENDS MEETING 45 FRIENDS AVENUE HADDONFIELD NJ 08033			SUPPORT ASSISTANCE PROGRAM FOR LOCAL REFUGEES	10,000.
JEWISH FAMILY & CHILDREN'S SERVICES 1301 SPRINGDALE ROAD, SUITE 150 CHERRY HILL NJ 08003			SUPPORT FOR SOUPS AND SWEETS CULINARY TRAINING AND CATERING PROGRAM	8,500.
PENDLE HILL 338 PLUSH MILL ROAD WALLINGFORD PA 19086			SUPPORT FOR YOUNG ADULT CONFERENCE	2,000.
SOUTH JERSEY QUAKERS 19 QUAKER STREET MARLTON NJ 08053			GENERAL PROGRAM SUPPORT	2,000.
<b>TOTAL</b>				<b>\$ 137,000.</b>



2019

**FEDERAL WORKSHEETS**

**D'OLIER FOUNDATION**

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**22-6075471**

**AVERAGE MONTHLY CASH BALANCES**  
FORM 990-PF, PART X, LINE 1B

CASH BAL.	JANUARY	FEBRUARY	MARCH	APRIL	MAY	JUNE	JULY	AUGUST	SEPTEMBER	OCTOBER	NOVEMBER	DECEMBER
SCENAB #5806	91,164	95,319	98,781	102,437	106,421	110,286	105,844	110,276	113,245	165,758	48,571	44,992
AVERAGES	91,164	95,319	98,781	102,437	106,421	110,286	105,844	110,276	113,245	165,758	48,571	44,992

TOTALS 1,193,094

NUMBER OF MONTHS 12

AVERAGE MONTHLY CASH BALANCES 99,425