

Form **990-PF****Return of Private Foundation**

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

1912

OMB No 1545-0047

2019Department of the Treasury
Internal Revenue Service

- ▶ 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

Open to Public Inspection

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

Name of foundation

THE H & R BLOCK FOUNDATION

A Employer identification number

23-7378232

Number and street (or P O box number if mail is not delivered to street address)

Room/suite

B Telephone number (see instructions)

(816) 854-4361

1 H AND R BLOCK WAY

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

KANSAS CITY, MO 64105-1905

C If exemption application is pending check here. ☐ 6

G Check all that apply

Initial return

Initial return of a former public charity

Final return

Amended return

Address change

☒ Name changeD 1 Foreign organizations, check here. ☐2 Foreign organizations meeting the 85% test, check here and attach computation ☐

H Check type of organization

☒ Section 501(c)(3) exempt private foundationE If private foundation status was terminated under section 507(b)(1)(A), check here. ☐☐ Section 4947(a)(1) nonexempt charitable trust☐ Other taxable private foundationF If the foundation is in a 60-month termination under section 507(b)(1)(B), check here. ☐

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

66,136,960.

J Accounting method

☐ Cash☐ Accrual☒ Other (specify)

MODIFIED CASH

(Part I, column (d), must be on cash basis)

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)	3,800.			
2	Check ☒ if the foundation is not required to attach Sch. B.				
3	Interest on savings and temporary cash investments.	15,977.	15,977.		
4	Dividends and interest from securities	1,020,110.	950,298.		
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	1,759,082.			
b	Gross sales price for all assets on line 6a	7,932,378.			
7	Capital gain net income (from Part IV, line 2)		2,146,430.		
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) ATCH. 1	8,746,009.	390,410.		
12	Total. Add lines 1 through 11	11,544,978.	3,503,115.	0.	
13	Compensation of officers, directors, trustees, etc.	132,318.	21,171.		111,147.
14	Other employee salaries and wages				
15	Pension plans, employee benefits	21,252.	3,400.		17,852.
16a	Legal fees (attach schedule) ATCH. 2	16,032.	8,016.		8,016.
b	Accounting fees (attach schedule) ATCH. 3	65,816.	26,225.		19,745.
c	Other professional fees (attach schedule) ATCH. 4	599,224.	433,279.		158,048.
17	Interest				
18	Taxes (attach schedule) (see instructions)				
19	Depreciation (attach schedule) and depletion				
20	Occupancy	3,354.	168.		3,186.
21	Travel, conferences, and meetings	4,283.	214.		4,069.
22	Printing and publications				
23	Other expenses (attach schedule) ATCH. 5	40,840.	306.		30,904.
24	Total operating and administrative expenses. Add lines 13 through 23.	883,119.	492,779.		352,967.
25	Contributions, gifts, grants paid	2,594,242.			2,594,242.
26	Total expenses and disbursements. Add lines 24 and 25	3,477,361.	492,779.	0.	2,947,209.
27	Subtract line 26 from line 12				
a	Excess of revenue over expenses and disbursements	8,067,617.			
b	Net investment income (if negative, enter -0-)		3,010,336.		
c	Adjusted net income (if negative, enter -0-)			0.	

Received
11/2/20

g60

5

03/04
12/2021
SCANNED MAR 12 2021
04/03Operating and Administrative Expenses
23250262 JAN 20 2021RECEIVED
NOV 20 2020
LOGDEN UT

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing		3,741,410.	3,437,889.	3,437,889.
	2	Savings and temporary cash investments				
	3	Accounts receivable ▶				
		Less allowance for doubtful accounts ▶				
	4	Pledges receivable ▶				
		Less allowance for doubtful accounts ▶				
	5	Grants receivable.				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (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)				
	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)	54,272,862.	62,497,250.	62,497,250.		
14	Land, buildings, and equipment basis ▶					
	Less accumulated depreciation ▶ (attach schedule)					
15	Other assets (describe ▶ ATCH 6)	47,174.	201,821.	201,821.		
16	Total assets (to be completed by all filers - see the instructions Also, see page 1, item I)	58,061,446.	66,136,960.	66,136,960.		
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 ▶ ATCH 7)	68,747.	76,644.		
23	Total liabilities (add lines 17 through 22)	68,747.	76,644.			
Net Assets or Fund Balances		Foundations that follow FASB ASC 958, check here ▶ ☐				
	24	Net assets without donor restrictions				
	25	Net assets with donor restrictions				
		Foundations that do not follow FASB ASC 958, check here ▶ ☒				
	26	Capital stock, trust principal, or current funds	57,992,699.	66,060,316.		
	27	Paid-in or capital surplus, or land, bldg, and equipment fund.				
	28	Retained earnings, accumulated income, endowment, or other funds				
29	Total net assets or fund balances (see instructions)	57,992,699.	66,060,316.			
30	Total liabilities and net assets/fund balances (see instructions)	58,061,446.	66,136,960.			

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	57,992,699.
2	Enter amount from Part I, line 27a.	2	8,067,617.
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	66,060,316.
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	66,060,316.

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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	2,146,430.	
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.

(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	2,971,800.	61,072,382.	0.048660
2017	3,044,923.	60,257,059.	0.050532
2016	3,007,815.	58,731,668.	0.051213
2015	3,074,705.	59,711,766.	0.051492
2014	3,506,488.	63,603,473.	0.055130
2 Total of line 1, column (d)			2 0.257027
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 0.051405
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5			4 58,688,350.
5 Multiply line 4 by line 3.			5 3,016,875.
6 Enter 1% of net investment income (1% of Part I, line 27b).			6 30,103.
7 Add lines 5 and 6.			7 3,046,978.
8 Enter qualifying distributions from Part XII, line 4. 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.			8 2,947,209.

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)		1	60,207.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b			
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	60,207.
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	60,207.
6 Credits/Payments			
a 2019 estimated tax payments and 2018 overpayment credited to 2019	6a	97,417.	
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	97,417.	
8 Enter any penalty for underpayment of estimated tax Check here ☐ if Form 2220 is attached	8		
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	37,210.	
11 Enter the amount of line 10 to be Credited to 2020 estimated tax	11	37,210.	Refunded

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?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition 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		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ 0. (2) On foundation managers \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		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		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	X	
b If "Yes," has it filed a tax return on Form 990-T for this year?	X	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		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?	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	X	
8a Enter the states to which the foundation reports or with which it is registered See instructions MO,		
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	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		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		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		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.		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>HRBLOCKFOUNDATION.ORG</u>	X	
14 The books are in care of ► <u>DAVID MILES</u> Telephone no ► <u>816-854-4361</u> Located at ► <u>1 H AND R BLOCK WAY KANSAS CITY, MO</u> ZIP+4 ► <u>64105</u>		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year		15
16 At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114 If "Yes," enter the name of the foreign country ►		X

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

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

	Yes	No
1a During the year, did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☒ Yes ☐ No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☒ Yes ☐ No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No (6) Agree to pay money or property to a government official? (Exception Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) ☐ Yes ☒ No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions Organizations relying on a current notice regarding disaster assistance, check here	1b	X
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

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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 8		132,318.	21,252.	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
ATCH 9		285,253.

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 ▶	

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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	36,561,190.
b	Average of monthly cash balances	1b	3,611,514.
c	Fair market value of all other assets (see instructions)	1c	19,409,377.
d	Total (add lines 1a, b, and c)	1d	59,582,081.
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	59,582,081.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	893,731.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	58,688,350.
6	Minimum investment return. Enter 5% of line 5	6	2,934,418.

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	2,934,418.
2a	Tax on investment income for 2019 from Part VI, line 5	2a	60,207.
b	Income tax for 2019 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	60,207.
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	2,874,211.
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	2,874,211.
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	2,874,211.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26.	1a	2,947,209.
b	Program-related investments - total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	2,947,209.
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	2,947,209.

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				2,874,211.
2 Undistributed income, if any, as of the end of 2019				
a Enter amount for 2018 only.				
b Total for prior years 20 <u>17</u> , 20 <u>16</u> , 20 <u>15</u>				
3 Excess distributions carryover, if any, to 2019				
a From 2014	397,772.			
b From 2015	242,131.			
c From 2016	80,484.			
d From 2017	63,962.			
e From 2018	53,873.			
f Total of lines 3a through e	838,222.			
4 Qualifying distributions for 2019 from Part XII, line 4 ▶ \$ <u>2,947,209.</u>				
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.				2,874,211.
e Remaining amount distributed out of corpus.	72,998.			
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	911,220.			
b Prior years' undistributed income Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount - see instructions				
e Undistributed income for 2018 Subtract line 4a from line 2a Taxable amount - see instructions				
f Undistributed income for 2019 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2020.				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)				
8 Excess distributions carryover from 2014 not applied on line 5 or line 7 (see instructions)	397,772.			
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a	513,448.			
10 Analysis of line 9				
a Excess from 2015	242,131.			
b Excess from 2016	80,484.			
c Excess from 2017	63,962.			
d Excess from 2018	53,873.			
e Excess from 2019	72,998.			

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

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

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

N/A

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

ATCH 10

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	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
Name and address (home or business)				
a Paid during the year ATCH 11				
Total			▶ 3a	2,594,242.
b Approved for future payment UMKC FOUNDATION 4801 MAIN STREET SUITE 1000 KANSAS CITY, MO 64111	NONE	PC	PLEDGED GRANT	1,082,585.
Total			▶ 3b	1,082,585.

Form 990-PF (2019)

Enter gross amounts unless otherwise indicated

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	15,977.		
4 Dividends and interest from securities			14	1,020,110.		
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	1,759,082.		
9 Net income or (loss) from special events . . .						
10 Gross profit or (loss) from sales of inventory . .						
11 Other revenue a _____						
b ATCH 12 _____				8,746,009.		
c _____						
d _____						
e _____						
12 Subtotal Add columns (b), (d), and (e)				11,541,178.		
13 Total Add line 12, columns (b), (d), and (e)						11,541,178.

(See worksheet in line 13 instructions to verify calculations)

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)
--------------	--

This image shows a single sheet of white paper with horizontal blue or grey ruling lines. A vertical line runs down the left side, creating a narrow margin. The paper appears to be from a notebook or a standard sheet of stationery. There are no markings, text, or drawings on the page.

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? | | Yes | No |
| 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. | | | |

[illegible]

- 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

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.

**Sign
Here**

Signature of officer or trustee

✓11-11-2020
Date

PRESIDENT
Title

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

**Paid
Preparer
Use Only**

Print/Type preparer's name	MICHAEL J ENGLE
----------------------------	-----------------

Preparer's signature M. R. Hyl

Date
11/6/2020

Check ☐ if self-employed	PTIN P00482834
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Firm's name	► BKD, LLP
Firm's address	► 1201 WALNUT, SUITE 1700 KANSAS CITY, MO

	Firm's EIN ▶ 44-0160260
64106-2246	Phone no 816-221-6300

Form **990-PF** (2019)

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)	
		MPLX LP					274.	
		NUSTAR ENERGY					-373.	
		PHILLIPS 66 PTRS					5.	
		WESTERN MIDSTREAM PTRS LP					128.	
		CID CAPITAL OPPORTUNITY FUND II					198,776.	
		OAKWOOD RE PTRS II					30,054.	
		PARAMETRIC GLOBAL DEFENSIVE					135,232.	
		RIVERVEST VENTURE FUND III					712.	
		ARROWSTREET INTERNATIONAL EQUITY					10,399.	
		WELLINGTON TRUST CO CTF DURABLE COMP					166,275.	
		WINGATE PTRS V					-156,245.	
		BUCKEYE PARTNERS					-2,830.	

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)	
7,932,378.		PUBLICLY TRADED SECURITIES 6,906,099.					VARIOUS 1,026,279.	VARIOUS
		SEMPER VIC PARTNERS OFFSHORE					319,049.	
		FIR TREE INTERNATIONAL VALUE FUND LP					227,322.	
		DOVER STREET IX CAYMAN FUND LP					175,815.	
		NHIT CREDIT ASSET TRUST					12,198.	
		RENAISSANCE INSTITUTIONAL EQUITIES FUND					3,360.	
TOTAL GAIN (LOSS)							<u>2,146,430.</u>	

ATTACHMENT 1

FORM 990PF, PART I - OTHER INCOME

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME
INCOME (LOSS) FROM SCHEDULES K-1			
UNREALIZED GAIN (LOSS) ON INVESTMENTS	8,746,009.	390,410.	
TOTALS	8,746,009.	390,410.	

ATTACHMENT 2FORM 990PF, PART I - LEGAL FEES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>	<u>ADJUSTED NET INCOME</u>	<u>CHARITABLE PURPOSES</u>
LEGAL FEES	16,032.	8,016.		8,016.
TOTALS	<u>16,032.</u>	<u>8,016.</u>		<u>8,016.</u>

ATTACHMENT 3

FORM 990PF, PART I - ACCOUNTING FEES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>	<u>ADJUSTED NET INCOME</u>	<u>CHARITABLE PURPOSES</u>
ACCOUNTING AND AUDIT FEES	65,816.	26,225.		19,745.
TOTALS	<u>65,816.</u>	<u>26,225.</u>		<u>19,745.</u>

ATTACHMENT 4FORM 990PF, PART I - OTHER PROFESSIONAL FEES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>	<u>ADJUSTED NET INCOME</u>	<u>CHARITABLE PURPOSES</u>
INVESTMENT ADV. & SERVICE FEES	432,736.	409,443.		23,293.
MANAGEMENT FEES	141,010.	22,562.		110,551.
CONSULTING FEES	25,478.	1,274.		24,204.
TOTALS	<u>599,224.</u>	<u>433,279.</u>		<u>158,048.</u>

ATTACHMENT 5FORM 990PF, PART I - OTHER EXPENSES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT INCOME	ADJUSTED NET INCOME	CHARITABLE PURPOSES
INFORMATION TECHNOLOGY	12,700.			12,700.
SPECIAL EVENT EXPENSES	6,125.	306.		5,819.
VOLUNTEER PROGRAM COSTS	11,521.			11,521.
INSURANCE-GENERAL	4,814.			
MISCELLANEOUS	5,680.			864.
TOTALS	40,840.	306.		30,904.

FORM 990PF, PART II - OTHER ASSETS

ATTACHMENT 6

<u>DESCRIPTION</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
DUE FROM M&H BLOCH FAM FDN	51,358.	51,358.
DUE FROM BROKER	150,463.	150,463.
TOTALS	<u>201,821.</u>	<u>201,821.</u>

ATTACHMENT 7FORM 990PF, PART II - OTHER LIABILITIESDESCRIPTIONENDING
BOOK VALUE

DUE TO HRB MANAGEMENT

76,644.

TOTALS

76,644.

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEESATTACHMENT 8

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION	CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	EXPENSE ACCT AND OTHER ALLOWANCES

HENRY W. BLOCH

1 H AND R BLOCK WAY

KANSAS CITY, MO 64105-1905

CHAIRMAN EMERITUS, DIRECTOR

.75

0.

0.

0.

THOMAS M. BLOCH

1 H AND R BLOCK WAY

KANSAS CITY, MO 64105-1905

CHAIRMAN, TREASURER, DIRECTOR

3.00

0.

0.

0.

BRUCE C. DAVISON

1 H AND R BLOCK WAY

KANSAS CITY, MO 64105-1905

VICE CHAIRMAN, DIRECTOR

.50

0.

0.

0.

THOMAS A. GERKE

1 H AND R BLOCK WAY

KANSAS CITY, MO 64105-1905

DIRECTOR

.50

0.

0.

0.

WILLIAM A. HALL

1 H AND R BLOCK WAY

KANSAS CITY, MO 64105-1905

DIRECTOR

.75

0.

0.

0.

EDWARD T. MATHENY, JR.

1 H AND R BLOCK WAY

KANSAS CITY, MO 64105-1905

DIRECTOR

.50

0

0.

0.

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEESATTACHMENT 8 (CONT'D)

NAME AND ADDRESS	TITLE AND AVERAGE HOURS PER WEEK DEVOTED TO POSITION	COMPENSATION	CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	EXPENSE ACCT AND OTHER ALLOWANCES
JOHN R. PHILLIPS 1 H AND R BLOCK WAY KANSAS CITY, MO 64105-1905	DIRECTOR .50	0.	0.	0.
MORTON I. SOSLAND 1 H AND R BLOCK WAY KANSAS CITY, MO 64105-1905	DIRECTOR .50	0.	0.	0.
SCOTT ANDREASEN 1 H AND R BLOCK WAY KANSAS CITY, MO 64105-1905	ASSISTANT TREASURER .50	0.	0.	0.
DAVID P. MILES 1 H AND R BLOCK WAY KANSAS CITY, MO 64105-1905	PRESIDENT 10.00	60,692.	6,169.	0.
CAREY WILKERSON-LOONEY 1 H AND R BLOCK WAY KANSAS CITY, MO 64105-1905	SECRETARY 30.00	71,626.	15,083.	0.
GRAND TOTALS		132,318.	21,252.	0.

990PF, PART VIII- COMPENSATION OF THE FIVE HIGHEST PAID PROFESSIONALSATTACHMENT 9

<u>NAME AND ADDRESS</u>	<u>TYPE OF SERVICE</u>	<u>COMPENSATION</u>
HRB MANAGEMENT, INC. 1 H & R BLOCK WAY KANSAS CITY, MO 64105	MANAGEMENT	141,010.
CAMBRIDGE ASSOCIATES LLC 100 SUMMER STREET BOSTON, MA 02110	INVESTMENT ADVISOR	144,243.
TOTAL COMPENSATION		<u>285,253.</u>

ATTACHMENT 10FORM 990PF, PART XV - NAME, ADDRESS AND PHONE FOR APPLICATIONS

H & R BLOCK FOUNDATION
1 H AND R BLOCK WAY
KANSAS CITY, MO 64105
816-854-4361

FORM IN WHICH APPLICATION SHOULD BE SUBMITTED AND INFORMATION THEY
SHOULD INCLUDE:

VISIT HRBLOCKFOUNDATION.ORG FOR GRANT APPLICATIONS AND SUBMISSION
GUIDELINES.

SUBMISSION DEADLINES:

VISIT HRBLOCKFOUNDATION.ORG FOR CURRENT SUBMISSION DEADLINES.

RESTRICTIONS OR LIMITATIONS ON AWARDS:

THE FOUNDATION PREFERS TO SUPPORT PROJECTS AND PROGRAMS THAT STRIVE
FOR EXCELLENCE, IMPROVE SERVICE FOR CLIENTS AND STRENGTHEN THE
ORGANIZATION. A MAJOR EMPHASIS IS PLACED ON SUPPORT OF ACTIVITIES
THAT SERVE UNDERSERVED, LOW-INCOME PERSONS LIVING IN JACKSON, CLAY,
AND PLATTE COUNTIES IN MISSOURI, AND WYANDOTTE AND JOHNSON COUNTIES
IN KANSAS.

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 11

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND		PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
	FOUNDATION	STATUS OF RECIPIENT		
ADMIRAL NIMITZ FOUNDATION 328 E MAIN STREET FREDERICKSBURG, TN 78624	NONE PC		HRBF BOARD OF DIRECTORS MATCHING GIFT PROGRAM	200
AMERICAN CANCER SOCIETY OF KANSAS CITY 1100 PENNSYLVANIA KANSAS CITY, MO 64105	NONE PC		HRB EMPLOYEE MATCHING GIFT PROGRAM	400
AMERICAN PUBLIC SQUARE, INC 300 E 39TH STREET KANSAS CITY, MO 64111	NONE PC		REVENUE AND AUDIENCE DIVERSITY EFFORTS	10,000
ARMOUR OAKS SENIOR LIVING COMMUNITY 8100 WORNALL ROAD KANSAS CITY, MO 64114	NONE PC		NEW FULLY ELECTRONIC RESIDENT BEDS FOR THE SKILLED	28,800
ART AS MENTORSHIP 3236 MORRELL AVE KANSAS CITY, MO 64123	NONE PC		ORGANIZATIONAL CAPACITY BUILDING	10,000
ARTS ENGAGEMENT FOUNDATION OF KANSAS CITY 20 E GREGORY BLVD KANSAS CITY, MO 64114	NONE PC		KC STUDIO'S CONTINUED GROWTH	2,500

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 11 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
ARTS KC-REGIONAL ARTS COUNCIL 106 SOUTHWEST BLVD KANSAS CITY, MO 64108	NONE PC	THE 2019 ARTSKC AWARDS, AT WHICH HENRY W BLOCH IS	10,000
ARTS KC-REGIONAL ARTS COUNCIL 106 SOUTHWEST BLVD KANSAS CITY, MO 64108	NONE PC	CATALYST GRANTS MADE TO SMALL AND MID-SIZED ARTS O	15,000
BAPTIST TRINITY LUTHERAN LEGACY FOUNDATION 6675 HOLMES RD KANSAS CITY, MO 64131	NONE PC	KANSAS CITY'S MEDICINE CABINET DATA MANAGEMENT SYS	21,300
BARUCH COLLEGE FUND ONE BERNARD BARUCH WAY NEW YORK, NY 10010	NONE PC	HRB EMPLOYEE MATCHING GIFT PROGRAM	1,000
BASE ACADEMY OF MUSIC 31 W 31ST STREET KANSAS CITY, MO 64108	NONE PC	THE CONTINUATION OF RESEARCH EDUCATION AND SOCIAL-	10,000
BILLINGS CATHOLIC SCHOOLS 215 NORTH 31ST STREET BILLINGS, MT 59101	NONE PC	HRB EMPLOYEE MATCHING GIFT PROGRAM	1,000

ATTACHMENT 11

1197102

V 19-7 5F

2 34 16 PM

3402PU K922 11/5/2020

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 11 (CONT'D)

RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR

AND

FOUNDATION STATUS OF RECIPIENT

RECIPIENT NAME AND ADDRESS

PURPOSE OF GRANT OR CONTRIBUTION

AMOUNT

BISHOP MIEGE HIGH SCHOOL
5041 REINHARDT DRIVE
SHAWNEE MISSION, KS 66205

HRB EMPLOYEE MATCHING GIFT PROGRAM

500

BLUFORD HEALTHCARE LEADERSHIP
7900 LEE'S SUMMIT RD
KANSAS CITY, MO 64139

THE LEADERSHIP INSTITUTE CAPACITY BUILDING PROJECT

10,000

BOY SCOUTS OF AMERICA
710 S HASTINGS WAY
EAU CLAIRE, WI 54701

2019 HENRY W BLOCH OUTSTANDING COMMUNITY SERVICE

2,500

BOY SCOUTS OF AMERICA, HEART OF AMERICA COUNCIL
10210 HOLMES ROAD
KANSAS CITY, MO 64131

H & R BLOCK EMPLOYEE CASH FOR CHAMPIONS PROGRAM

400

BRIDGTON ACADEMY
11 ACADEMY LANE
NORTH BRIDGTON, ME 04057

HRB EMPLOYEE MATCHING GIFT PROGRAM

100

CALIFORNIA LUTHERAN UNIVERSITY
60 W OLSEN ROAD
THOUSAND OAKS, CA 91360

HRB EMPLOYEE MATCHING GIFT PROGRAM

1,000

ATTACHMENT 11

3402PU K922 11/5/2020 2 34 16 PM V 19-7 5F 1197102

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

ATTACHMENT 11 (CONT'D)

RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR
AND
FOUNDATION STATUS OF RECIPIENT

RECIPIENT NAME AND ADDRESS

PURPOSE OF GRANT OR CONTRIBUTION

AMOUNT

CAMPS FOR KIDS 5913 WOODSON RD MISSION, KS 66202	NONE PC	SCHOLARSHIPS TO ATTEND SUMMER CAMP	6,500
CENSUS EQUITY FUND (CENS00) AT THE GREATER KANSAS 1055 BROADWAY KANSAS CITY, MO 64105	NONE PC	THE 2020 CENSUS EQUITY FUND	25,000
CENTER FOR CONFLICT RESOLUTION 6285 PASEO KANSAS CITY, MO 64110	NONE PC	THE FIRST CONFLICT RESOLUTION HUB SITE	25,000
CENTRAL METHODIST UNIVERSITY 411 CENTRAL METHODIST SQUARE FAYETTE, MO 65248	NONE PC	HRB EMPLOYEE MATCHING GIFT PROGRAM	1,000
CENTRAL METHODIST UNIVERSITY 411 CENTRAL METHODIST SQUARE FAYETTE, MO 65248	NONE PC	HRB EMPLOYEE MATCHING GIFT PROGRAM	1,000
CHARLOTTE STREET FOUNDATION P O BOX 10263 KANSAS CITY, MO 64171	NONE PC	THE CHARLOTTE STREET FOUNDATION CAPITAL CAMPAIGN	50,000

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V 19-7 5F

2 34 16 PM

3402PU K922 11/5/2020

ATTACHMENT 11

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 11 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT		PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
COLORADO COLLEGE 14 E CACHE LA POUDE ST COLORADO SPGS, CO 80903	NONE PC		HRB EMPLOYEE MATCHING GIFT PROGRAM	1,000
COMMUNITY ASSISTANCE COUNCIL 10901 BLUE RIDGE BOULEVARD KANSAS CITY, MO 64134	NONE PC		OPERATIONAL IMPROVEMENTS	5,600
COMMUNITY SERVICES LEAGUE 404 NORTH NOLAND ROAD INDEPENDENCE, MO 64050	NONE PC		WAREHOUSE AND FOOD PANTRY CAPACITY ENHANCEMENTS	13,300
COOPERATIVE ESL MINISTRIES P O BOX 65172 CALGARY ALBERTA CANADA T2N 4T6	NONE PC		H & R BLOCK EMPLOYEE CASH FOR CHAMPIONS PROGRAM	400
CORNERSTONES OF CARE 300 E 36TH ST KANSAS CITY, MO 64111	NONE PC		STAFF TRAINING IN THE SOLUTIONS-BASED CASEWORK MOD	43,000
CORPORATION FOR SUPPORTIVE HOUSING 3222 LOCKRIDGE AVENUE KANSAS CITY, MO 64128	NONE PC		KC-ONE ROOF	35,000

1197102

V 19-7 5F

2 34 16 PM

3402PU K922 11/5/2020

ATTACHMENT 11

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 11 (CONT'D)RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR
AND

RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
COVERSA 1317 W 13TH TERRACE KANSAS CITY, MO 64102	NONE PC	H & R BLOCK EMPLOYEE CASH FOR CHAMPIONS PROGRAM	400
COVERSA 1317 W 13TH TERRACE KANSAS CITY, MO 64102	NONE PC	COSTS FOR STAFF AND TECHNOLOGY NECESSARY TO CONVER	25,000
CROSS-LINES COMMUNITY OUTREACH 736 SHAWNEE AVENUE KANSAS CITY, KS 66105	NONE PC	THE COMPREHENSIVE STRATEGIC PLAN	25,000
DETERMINATION, INCORPORATED 4747 TROOST KANSAS CITY, MO 64110	NONE PC	ONE-TIME COSTS RELATED TO WORKSHOPS AND ENTREPRENE	5,000
DONNELLY COLLEGE 608 N 18TH STREET KANSAS CITY, KS 66102	HWB SCHOLARS PC	FUNDS TO SUPPORT ACTIVITIES AND EMERGENCY ASSISTAN	1,040
DONNELLY COLLEGE 608 N 18TH STREET KANSAS CITY, KS 66102	HWB SCHOLARS PC	FUNDS TO SUPPORT HENRY W BLOCH SCHOLARS DURING 20	26,343

ATTACHMENT 11

3402PU K922 11/5/2020 2 34 16 PM V 19-7 5F 1197102

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 11 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT		PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
DONNELLY COLLEGE 608 N 18TH STREET KANSAS CITY, KS 66102	HWB SCHOLARS PC		FUNDS TO SUPPORT HENRY W BLOCH SCHOLARS DURING 20	43,981
DOWNTOWN KANSAS CITY CIVIC VENTURES 1000 WALNUT STREET KANSAS CITY, MO 64106	NONE PC		THE DOWNTOWN KC 2030 STRATEGIC PLAN	50,000
EMPOWERING PARENTS 668 SE BAYBERRY LANE LEE'S SUMMIT, MO 64063	NONE PC		TECHNOLOGICAL CAPACITY EXPANSION	10,000
ERIN ANDRA WILSON FOUNDATION 121 W 48TH STREET KANSAS CITY, MO 64112	NONE PC		HRBF BOARD OF DIRECTORS MATCHING GIFT PROGRAM	400
FOOD EQUALITY INITIATIVE INC 11 EAST 40TH STREET KANSAS CITY, MO 64111	NONE PC		THE ALLERGY-FRIENDLY AND GLUTEN-FREE NUTRITION ASS	25,000
FOOTPRINTS, INC 4501 TROOST KANSAS CITY, MO 64110	NONE PC		PREDEVELOPMENT ANALYSIS OF PLANNED BUILDING SITE	10,000

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 11 (CONT'D)RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR
AND

RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
FRIENDS OF THE ZOO 6800 ZOO DRIVE KANSAS CITY, MO 64132	NONE PC	H & R BLOCK EMPLOYEE CASH FOR CHAMPIONS PROGRAM	200
FRIENDS OF UNIVERSITY ACADEMY 8080 WARD PARKWAY KANSAS CITY, MO 64114	NONE PC	HRBF BOARD OF DIRECTORS MATCHING GIFT PROGRAM	5,666
FRONT PORCH ALLIANCE 3210 MICHIGAN AVE KANSAS CITY, MO 64109	NONE PC	HRBF BOARD OF DIRECTORS MATCHING GIFT PROGRAM	2,000
FRONT PORCH ALLIANCE 3210 MICHIGAN AVE KANSAS CITY, MO 64109	NONE PC	EXPANSION OF THE NEIGHBORHOOD FAMILIES PROGRAM	25,000
GATEWAY OF HOPE MINISTRIES INC 801 N MUR-LEN RD OLATHE, KS 66062	NONE PC	AN ELECTRONIC HEALTH RECORDS SYSTEM	10,000
GEORGIA STATE UNIVERSITY FOUNDATION P O BOX 2668 ATLANTA, GA 30301	NONE PC	HRB EMPLOYEE MATCHING GIFT PROGRAM	100

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

ATTACHMENT 11 (CONT'D)

RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR
AND

RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
GEORGIA TECH FOUNDATION OFFICE OF DEVELOPMENT ATLANTA, GA 30332	NONE PC	HRB CORPORATE BOARD MATCHING GIFT PROGRAM	5,000
GIVING THE BASICS INC 927 S 7TH STREET TRAFFICWAY KANSAS CITY, KS 66105	NONE PC	CAPACITY BUILDING	50,000
GOODWILL OF WESTERN MISSOURI AND EASTERN KANSAS 1817 CAMPBELL STREET KANSAS CITY, MO 64108	NONE PC	THE IMPLEMENTATION OF A NEW CRM SYSTEM	30,000
GRANDVIEW ASSISTANCE PROGRAM 1211 MAIN STREET GRANDVIEW, MO 64030	NONE PC	TECHNOLOGY MODERNIZATION	8,000
GRAYS FERRY CIVIC ASSOCIATION 2646 REED ST PHILADELPHIA, PA 19146	NONE PC	2019 HENRY W BLOCH OUTSTANDING COMMUNITY SERVICE	5,000
GREAT PLAINS SPCA 5428 ANTIOCH DRIVE MERRIAM, KS 66202	NONE PC	HRB-EMPLOYEE MATCHING GIFT PROGRAM	300

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FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 11 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT		PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
GREATER K C LINC INC 3100 BROADWAY BLVD KANSAS CITY, MO 64111	NONE PC		HRBF BOARD OF DIRECTORS MATCHING GIFT PROGRAM	6,668
GREATER KANSAS CITY HISPANIC DEVELOPMENT FUND 1055 BROADWAY BLVD KANSAS CITY, MO 64105	NONE PC		SCHOLARSHIPS FOR HISPANIC STUDENTS TO ATTEND POST-	10,000
HAPPYBOTTOMS 303 W 79TH STREET KANSAS CITY, MO 64114	NONE PC		HAPPY BOTTOMS' SYSTEM UPGRADES	29,000
HARVESTERS - THE COMMUNITY FOOD NETWORK 3801 TOPPING AVENUE KANSAS CITY, MO 64129	NONE PC		IN HONOR OF MORTON SOSLAND	10,000
HARVESTERS - THE COMMUNITY FOOD NETWORK 3801 TOPPING AVENUE KANSAS CITY, MO 64129	NONE PC		ONGOING OPERATING SUPPORT	25,000
HAWKINS COUNTY CANCER SUPPORT GROUP P O BOX 253 SURGOINSVILLE, TN 37873	NONE PC		2019 HENRY W BLOCH OUTSTANDING COMMUNITY SERVICE	5,000

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 11 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND		PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
	FOUNDATION	STATUS OF RECIPIENT		
HAYWARD COMPOSITE MOUNTAIN BIKE TEAM PO BOX 772 HAYWARD, WI 54843	NONE PC		2019 HENRY W BLOCH OUTSTANDING COMMUNITY SERVICE	2,500
HEART OF AMERICA SHAKESPEARE FESTIVAL OF GREATER K 3732 MAIN STREET KANSAS CITY, MO 64111	NONE PC		THE EXPANDED 2019 SEASON	15,000
HEARTLAND CHAMBER MUSIC 1600 GENESEE ST KANSAS CITY, MO 64102	NONE PC		BOARD DEVELOPMENT, LEADERSHIP, TRAINING, AND CONST	5,000
HENRY WOLLMAN BLOCH FOUNTAIN FUND AT THE GREATER K 1055 BROADWAY KANSAS CITY, MO 64105	HWB FOUNTAIN PC		SUPPORT FOR MAJOR CAPITAL IMPROVEMENTS TO THE HENR	50,000
HENRY WOLLMAN BLOCH FOUNTAIN FUND AT THE GREATER K 1055 BROADWAY KANSAS CITY, MO 64105	HWB FOUNTAIN PC		SUPPORT FOR MAJOR CAPITAL IMPROVEMENTS TO THE HENR	75,000
IN AS MUCH MINISTRY 2050 PLUMBERS WAY LIBERTY, MO 64068	NONE PC		ACQUIRE A VAN FOR CLIENT FOOD DELIVERY AND RETAIL	10,000

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FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 11 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
INDIANA UNIVERSITY FOUNDATION P O BOX 500 BLOOMINGTON, IN 47402	NONE PC	HRB EMPLOYEE MATCHING GIFT PROGRAM	100
INTERNATIONAL RELATIONS COUNCIL 107 W 9TH STREET KANSAS CITY, MO 64105	NONE PC	THE EVOLUTION OF GERMAN-JEWISH RELATIONS	2,000
JACKSON COUNTY CASA 2544 HOLMES STREET KANSAS CITY, MO 64108	NONE PC	ENHANCED SYSTEMS TO SUPPORT PROGRAM EXPANSION	15,000
JAMES C FERRER EDUCATION FOUNDATION 200 TUCKAHOE ROAD SOUTHAMPTON, NY 11968	NONE PC	HRB CORPORATE BOARD MATCHING GIFT PROGRAM	1,000
JERUSALEM FARM 520 GARFIELD AVE KANSAS CITY, MO 64124	NONE PC	EXPANSION OF JERUSALEM FARM'S MINOR HOME REPAIR PR	35,000
JEWISH VOCATIONAL SERVICE 4600 THE PASEO KANSAS CITY, MO 64110	NONE PC	JVS' TECHNOLOGY UPGRADE	23,300

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 11 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND		PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
	FOUNDATION	STATUS OF RECIPIENT		
KANSAS CITY ART INSTITUTE 4415 WARWICK BLVD KANSAS CITY, MO 64111	NONE PC		ONGOING OPERATION OF THE H&R BLOCK ARTSPACE	20,000
KANSAS CITY BALLET 500 WEST PERSHING ROAD KANSAS CITY, MO 64108	NONE PC		COMMUNITY ENGAGEMENT AND EDUCATION PROGRAMS	15,000
KANSAS CITY CARE CLINIC DBA KC CARE HEALTH CENTER 3515 BROADWAY KANSAS CITY, MO 64111	NONE PC		STARTUP OF THE HOMEROOM HEALTH CLINIC	50,000
KANSAS CITY FILMMAKERS JUBILEE 4741 CENTRAL STREET KANSAS CITY, MO 64112	NONE PC		HRBF BOARD OF DIRECTORS MATCHING GIFT PROGRAM	1,700
KANSAS CITY FRIENDS OF ALVIN AILEY 1714 EAST 18TH STREET KANSAS CITY, MO 64108	NONE PC		ONGOING OPERATING SUPPORT	12,000
KANSAS CITY JAZZ ALIVE 3013 MAIN STREET KANSAS CITY, MO 64108	NONE PC		THE DEVELOPMENT AND IMPLEMENTATION OF A STRATEGIC	8,000

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 11 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND		PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
	FOUNDATION	STATUS OF RECIPIENT		
KANSAS CITY POLICE OFFICERS MEMORIAL FOUNDATION 527 W 39TH STREET KANSAS CITY, MO 64111	NONE	PC	THE KANSAS CITY REGIONAL LAW ENFORCEMENT MEMORIAL	10,000
KANSAS CITY REPERTORY THEATRE 4825 TROOST AVE KANSAS CITY, MO 64110	NONE	PC	HRBF BOARD OF DIRECTORS MATCHING GIFT PROGRAM	3,000
KANSAS CITY REPERTORY THEATRE 4825 TROOST AVE KANSAS CITY, MO 64110	NONE	PC	ONGOING PROGRAMS AND OPERATIONS OF THE SPENCER THE	15,000
KANSAS CITY SYMPHONY 1703 WYANDOTTE ST KANSAS CITY, MO 64108	NONE	PC	ONGOING PROGRAM AND OPERATING SUPPORT	25,000
KANSAS CITY YOUNG AUDIENCES 3732 MAIN ST KANSAS CITY, MO 64111	NONE	PC	ONGOING OPERATION OF THE ARTS PARTNERS	13,000
KANSAS CITY YOUNG AUDIENCES 3732 MAIN ST KANSAS CITY, MO 64111	NONE	PC	CAPACITY BUILDING EFFORTS NECESSARY TO INCREASE TH	24,000

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 11 (CONT'D)RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR
AND

RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
KANSAS STATE UNIVERSITY FOUNDATION 22201 WEST INNOVATION DRIVE OLATHE, KS 66061	NONE PC	AN ADDITIONAL COLLEGE ADVISER IN THE SHAWNEE MISSI	35,000
KANSAS UNIVERSITY ENDOWMENT ASSOCIATION 3901 RAINBOW BLVD KANSAS CITY, KS 66160	NONE PC	HRB EMPLOYEE MATCHING GIFT PROGRAM	100
KANSAS UNIVERSITY ENDOWMENT ASSOCIATION 3901 RAINBOW BLVD KANSAS CITY, KS 66160	NONE PC	HRB EMPLOYEE MATCHING GIFT PROGRAM	500
KANSAS UNIVERSITY ENDOWMENT ASSOCIATION 3901 RAINBOW BLVD KANSAS CITY, KS 66160	NONE PC	HRB EMPLOYEE MATCHING GIFT PROGRAM	1,000
KCPT-PUBLIC TELEVISION 19 125 EAST 31ST STREET KANSAS CITY, MO 64108	NONE PC	HRBF BOARD OF DIRECTORS MATCHING GIFT PROGRAM	5,000
KCPT-PUBLIC TELEVISION 19 125 EAST 31ST STREET KANSAS CITY, MO 64108	NONE PC	UNRESTRICTED GIFT IN HONOR OF ED MATHENY	10,000

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FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 11 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND		PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
	FOUNDATION	STATUS OF RECIPIENT		
KCUR 89.3 4825 TROOST AVE KANSAS CITY, MO 64110	NONE PC		HRBF BOARD OF DIRECTORS MATCHING GIFT PROGRAM	2,000
KEMPER MUSEUM MILESTONE FUND AT THE GREATER KANSAS 1055 BROADWAY BLVD KANSAS CITY, MO 64105	NONE PC		HRBF BOARD OF DIRECTORS MATCHING GIFT PROGRAM	1,333
KIDS TLC 480 S ROGERS ROAD OLATHE, KS 66062	NONE PC		EXPANSION OF SPECIALTY SERVICES PROVIDED THROUGH T	50,000
LEAD TO READ 6022 N STRATHBURY AVE KANSAS CITY, MO 64151	NONE PC		H&R BLOCK ASSOCIATE VOLUNTEER ACTIVITIES IN 2019	2,500
LEVELUP KIDS 5416 NE ANTIOCH ROAD KANSAS CITY, MO 64119	NONE PC		INCREASING ACCESS TO VISION HEALTHCARE FOR LOW-INC	50,000
LITERACY KANSAS CITY 3036 TROOST AVE KANSAS CITY, MO 64109	NONE PC		H&R BLOCK ASSOCIATE VOLUNTEER ACTIVITIES IN 2019	2,500

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FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 11 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND		PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
	FOUNDATION	STATUS OF RECIPIENT		
LYRIC OPERA OF KANSAS CITY 1725 HOLMES STREET KANSAS CITY, MO 64108	NONE PC		ONGOING PROGRAMS AND OPERATIONS	15,000
MARLBOROUGH COMMUNITY COALITION 1809 E 80TH STREET KANSAS CITY, MO 64132	NONE PC		THE MARLBOROUGH COMMUNITY LAND TRUST	40,000
MASSACHUSETTS INSTITUTE OF TECHNOLOGY 600 MEMORIAL DRIVE CAMBRIDGE, MA 02139	NONE PC		HRB EMPLOYEE MATCHING GIFT PROGRAM	50
MASSACHUSETTS INSTITUTE OF TECHNOLOGY 600 MEMORIAL DRIVE CAMBRIDGE, MA 02139	NONE PC		HRB EMPLOYEE MATCHING GIFT PROGRAM	100
METROPOLITAN COMMUNITY COLLEGE FOUNDATION 3200 BROADWAY KANSAS CITY, MO 64111	HWB SCHOLARS PC		FUNDS TO SUPPORT HENRY W BLOCH SCHOLARS DURING 20	19,450
METROPOLITAN COMMUNITY COLLEGE FOUNDATION 3200 BROADWAY KANSAS CITY, MO 64111	HWB SCHOLARS PC		FUNDS TO SUPPORT HENRY W BLOCH SCHOLARS DURING 20	20,292

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

ATTACHMENT 11 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
METROPOLITAN LUTHERAN MINISTRY 3031 HOLMES STREET KANSAS CITY, MO 64109	NONE PC	THE NORTHLAND COMMUNITY ASSISTANCE CENTER EXPANSIO	25,000
MID AMERICA ASSISTANCE COALITION 1 I WEST ARMOUR BLVD KANSAS CITY, MO 64111	NONE PC	ONGOING OPERATING SUPPORT	10,000
MOCSA 3100 BROADWAY KANSAS CITY, MO 64111	NONE PC	ONGOING OPERATING SUPPORT	11,000
MOTHER'S REFUGE 14400 E 42ND ST S INDEPENDENCE, MO 64055	NONE PC	GROUP ROOM REMODEL FOR HOMELESS YOUNG MOTHERS AND	10,000
MOUNT CARMEL REDEVELOPMENT CORPORATION 1130 TROUP AVENUE KANSAS CITY, KS 66104	NONE PC	THE FINANCIAL AND HOMEBUYER EDUCATION PROGRAM	25,000
NATIVITY PARISH SCHOOL 3800 W 119TH ST LEAWOOD, KS 66209	NONE PC	HRBF BOARD OF DIRECTORS MATCHING GIFT PROGRAM	2,400

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 11 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND		PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
	FOUNDATION	STATUS OF RECIPIENT		
NEW REFORM TEMPLE 7100 MAIN KANSAS CITY, MO 64114	NONE PC		HRBF BOARD OF DIRECTORS MATCHING GIFT PROGRAM	5,000
NEWHOUSE PO BOX 240019 KANSAS CITY, MO 64124	NONE PC		UPGRADING SECURITY SURVEILLANCE	35,000
NOAH WEBSTER HOUSE 227 S MAIN ST WEST HARTFORD, CT 06107	NONE PC		HRB CORPORATE BOARD MATCHING GIFT PROGRAM	5,000
NORTHLAND EARLY EDUCATION CENTER 8630 NORTH OAK TRAFFICWAY KANSAS CITY, MO 64155	NONE PC		THE NEEC CAPITAL CAMPAIGN	25,000
NORTHLAND HEALTH CARE PO BOX 14414 PARKVILLE, MO 64152	NONE PC		WOMEN'S HEALTH TRANSITIONAL PROGRAM	9,000
OIKOS DEVELOPMENT CORPORATION 1712 MAIN STREET KANSAS CITY, MO 64111	NONE PC		THE STARTUP OF OIKOS DEVELOPMENT CORPORATION	50,000

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FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 11 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT		PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
OPERATION BREAKTHROUGH 3039 TROOST AVE KANSAS CITY, MO 64109	NONE PC		H&R BLOCK ASSOCIATE VOLUNTEER ACTIVITIES IN 2019	2,500
OPERATION BREAKTHROUGH 3039 TROOST AVE KANSAS CITY, MO 64109	NONE PC		EXPANSION OF THE MAKERCITY FOR SCHOOL-AGE CHILDREN	50,000
PITTSBURG STATE UNIVERSITY 401 EAST FORD PITTSBURG, KS 66762	NONE PC		HRB EMPLOYEE MATCHING GIFT PROGRAM	50
PLANET PLAY 15001 W 77TH TERR LENEXA, KS 66216	NONE PC		CAPACITY BUILDING INITIATIVES INCLUDING PROGRAM DE	10,000
PLAZA ACADEMY 3930 BROADWAY BOULEVARD KANSAS CITY, MO 64111	NONE PC		PLAZA ACADEMY'S HIRING OF AN ADDITIONAL INSTRUCTOR	25,200
PRESIDENT & FELLOWS OF HARVARD COLLEGE P O BOX 419209 BOSTON, MA 02241	NONE PC		HRBF BOARD OF DIRECTORS MATCHING GIFT PROGRAM	200

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FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 11 (CONT'D)

RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR

AND

FOUNDATION STATUS OF RECIPIENT

RECIPIENT NAME AND ADDRESS

PURPOSE OF GRANT OR CONTRIBUTION

AMOUNT

PRESIDENT & FELLOWS OF HARVARD COLLEGE
P O BOX 419209
BOSTON, MA 02241

NONE
PC

HRB CORPORATE BOARD MATCHING GIFT PROGRAM

2,500

PROJECT LINUS
7313 E 158TH STREET
KANSAS CITY, MO 64012

NONE
PC

H & R BLOCK EMPLOYEE CASH FOR CHAMPIONS PROGRAM

200

RAVENWOOD NATURAL SCIENCE CENTER
PO BOX 1314
WHITEFISH, MT 59937

NONE
PC

HRB CORPORATE BOARD MATCHING GIFT PROGRAM

1,000

RECONCILIATION SERVICES
3101 TROOST AVENUE
KANSAS CITY, MO 64109

NONE
PC

THELMA'S KITCHEN VOLUNTEER MANAGEMENT AND COMMUNIT

25,000

REDD HEART FOUNDATION INC
704 W BIRCHTREE LN
CLAYMONT, DE 19703

NONE
PC

2019 HENRY W BLOCH OUTSTANDING COMMUNITY SERVICE

5,000

RIGHTFULLY SEWN (C/O COMMUNITY CAPITAL FUND, ORG'S
1800 WYANDOTTE ST
KANSAS CITY, MO 64108

NONE
PC

THE SEAMSTRESS TRAINING PROGRAM EXPANSION

22,300

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

ATTACHMENT 11 (CONT'D)

RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR

AND

FOUNDATION STATUS OF RECIPIENT

RECIPIENT NAME AND ADDRESS

PURPOSE OF GRANT OR CONTRIBUTION

AMOUNT

RONALD McDONALD HOUSE CHARITIES OF KANSAS CITY
2502 CHERRY STREET
KANSAS CITY, MO 64108

NONE
PC

H & R BLOCK EMPLOYEE CASH FOR CHAMPIONS PROGRAM

400

RONALD McDONALD HOUSE CHARITIES OF KANSAS CITY
2502 CHERRY STREET
KANSAS CITY, MO 64108

NONE
PC

PROJECT GROW

50,000

SAFEHOME, INC
PO BOX 4563
OVERLAND PARK, KS 66204

NONE
PC

THE MAGNETIC KEY SYSTEM UPGRADE AND ASSOCIATED SOF

5,100

SAINT LUKE'S FOUNDATION
901 E 104TH STREET
KANSAS CITY, MO 64131

NONE
PC

HRBF BOARD OF DIRECTORS MATCHING GIFT PROGRAM

2,000

SHERWOOD AUTISM CENTER
8030 WARD PARKWAY PLAZA
KANSAS CITY, MO 64114

NONE
PC

THE OPPORTUNITIES FOR A LIFETIME CAPITAL CAMPAIGN

75,000

SHOW ME KC SCHOOLS
4049 W PENNSYLVANIA AVE
KANSAS CITY, MO 64111

NONE
PC

THE MEET THE TERMS OF THE ORGANIZATION'S SCHOOLSMA

25,000

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 11 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
SOUTHERN METHODIST UNIVERSITY PO BOX 750261 DALLAS, TX 75275	NONE PC	HRBF BOARD OF DIRECTORS MATCHING GIFT PROGRAM	2,000
START AT ZERO 900 E 24TH TERRACE KANSAS CITY, MO 64108	NONE PC	THE PURCHASE OF FURNITURE AND EQUIPMENT, AND FACIL	45,000
STEPS OF FAITH P O BOX 15064 LENEXA, KS 66285	NONE PC	ORGANIZATIONAL CAPACITY BUILDING	10,000
THE COTERIE THEATRE 2450 GRAND BLVD KANSAS CITY, MO 64108	NONE PC	PILOTING THE TEEN MENTAL HEALTH INITIATIVE	20,000
THE HARRY S TRUMAN GOOD NEIGHBOR AWARD FOUNDATION P O BOX 755 SHAWNEE MISSION, KS 66201	NONE PC	HRBF BOARD OF DIRECTORS MATCHING GIFT PROGRAM	200
THE LITERACY LAB 4049 PENNSYLVANIA KANSAS CITY, MO 64111	NONE PC	PROGRAM EXPANSION	25,000

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 11 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND		PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
	FOUNDATION	STATUS OF RECIPIENT		
THE NATURE CONSERVANCY, KANSAS CHAPTER 2420 NW BUTTON ROAD TOPEKA, KS 66618	NONE PC		GENERAL OPERATING EXPENSES	5,000
THE NELSON GALLERY FOUNDATION 4525 OAK STREET KANSAS CITY, MO 64111	NONE PC		HRBF BOARD OF DIRECTORS MATCHING GIFT PROGRAM	2,000
THE NELSON GALLERY FOUNDATION 4525 OAK STREET KANSAS CITY, MO 64111	NONE PC		HRBF BOARD OF DIRECTORS MATCHING GIFT PROGRAM	10,000
THE PINGRY SCHOOL 131 MARTINSVILLE ROAD BASKING RIDGE, NJ 07920	NONE PC		HRB EMPLOYEE MATCHING GIFT PROGRAM	150
THE SHEPHERD'S CENTER KANSAS CITY CENTRAL 1111 W 39TH ST KANSAS CITY, MO 64111	NONE PC		SENIOR COMPANION PROGRAM	5,000
THRIVE HEALTH CONNECTIONS 5008 PROSPECT AVENUE KANSAS CITY, MO 64130	NONE PC		HIRING AN ADDITIONAL MENTAL HEALTH PROFESSIONAL	28,600

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

ATTACHMENT 11 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND		PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
	FOUNDATION	STATUS OF RECIPIENT		
TRUMAN STATE UNIVERSITY FOUNDATION 100 E NORMAL AVE KIRKSVILLE, MO 63501	NONE PC		HRB EMPLOYEE MATCHING GIFT PROGRAM	150
U S NAVY MEMORIAL FOUNDATION 701 PENNSYLVANIA AVE NW WASHINGTON, DC 20004	NONE PC		HRBF BOARD OF DIRECTORS MATCHING GIFT PROGRAM	400
UMKC FOUNDATION 5115 OAK ST KANSAS CITY, MO 64112	HWB SCHOLARS PC		FUNDS TO SUPPORT ACTIVITIES AND EMERGENCY ASSISTAN	500
UMKC FOUNDATION 5115 OAK ST KANSAS CITY, MO 64112	HWB SCHOLARS PC		FUNDS TO SUPPORT HENRY W BLOCH SCHOLARS DURING 20	1,973
UMKC FOUNDATION 5115 OAK ST KANSAS CITY, MO 64112	NONE PC		34TH ANNUAL ENTREPRENEUR OF THE YEAR AWARDS CEREMO	10,000
UMKC FOUNDATION 5115 OAK ST KANSAS CITY, MO 64112	HWB SCHOLARS PC		INTENSIVE SUPPORT SERVICES PROVIDED FOR STUDENTS A	13,000

FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 11 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND		PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
	FOUNDATION	STATUS OF RECIPIENT		
UMKC FOUNDATION 5115 OAK ST KANSAS CITY, MO 64112	HWB SCHOLARS PC		FUNDS TO SUPPORT HENRY W BLOCH SCHOLARS ORIGINAL	103,415
UMKC FOUNDATION 5115 OAK ST KANSAS CITY, MO 64112	HWB SCHOLARS PC		FUNDS TO SUPPORT HENRY W BLOCH SCHOLARS DURING 20	115,331
UNCW STUDENT AID ASSOCIATION 601 S COLLEGE RD WILMINGTON, NC 28403	NONE PC		HRB EMPLOYEE MATCHING GIFT PROGRAM	1,000
UNICORN THEATRE 3828 MAIN STREET KANSAS CITY, MO 64111	NONE PC		ONGOING OPERATING SUPPORT	9,000
UNITED SERVICE ORGANIZATIONS 2111 WILSON BLVD ARLINGTON, VA 22201	NONE PC		HRBF BOARD OF DIRECTORS MATCHING GIFT PROGRAM	200
UNITED WAY OF GREATER KANSAS CITY 801 W 47TH STREET KANSAS CITY, MO 64112	NONE PC		ONGOING OPERATION OF THE 2-1-1 REFERRAL AND INFORM	10,000

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FORM 990PF, PART XV - GRANTS AND CONTRIBUTIONS PAID DURING THE YEARATTACHMENT 11 (CONT'D)RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR
AND

RECIPIENT NAME AND ADDRESS	FOUNDATION STATUS OF RECIPIENT	PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
UNITED WAY OF GREATER KANSAS CITY 801 W 47TH STREET KANSAS CITY, MO 64112	NONE PC	HRBF BOARD OF DIRECTORS MATCHING GIFT PROGRAM	10,000
UNIVERSITY OF KANSAS HEALTH SYSTEMS 2330 SHAWNEE MISSION PARKWAY WESTWOOD, KS 66205	NONE PC	HRBF BOARD OF DIRECTORS MATCHING GIFT PROGRAM	2,000
UNIVERSITY OF MISSOURI-COLUMBIA 407 REYNOLDS ALUMNI CENTER COLUMBIA, MO 65211	NONE PC	HRBF BOARD OF DIRECTORS MATCHING GIFT PROGRAM	200
UNIVERSITY OF MISSOURI-COLUMBIA 407 REYNOLDS ALUMNI CENTER COLUMBIA, MO 65211	NONE PC	HRB EMPLOYEE MATCHING GIFT PROGRAM	1,000
UNIVERSITY OF MISSOURI-COLUMBIA 407 REYNOLDS ALUMNI CENTER COLUMBIA, MO 65211	NONE PC	HRB EMPLOYEE MATCHING GIFT PROGRAM	1,000
UNIVERSITY OF MISSOURI-COLUMBIA 407 REYNOLDS ALUMNI CENTER COLUMBIA, MO 65211	NONE PC	HRB EMPLOYEE MATCHING GIFT PROGRAM	1,000

ATTACHMENT 11

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

ATTACHMENT 11 (CONT'D)

RECIPIENT NAME AND ADDRESS	RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR AND FOUNDATION STATUS OF RECIPIENT		PURPOSE OF GRANT OR CONTRIBUTION	AMOUNT
UNIVERSITY OF NEBRASKA FOUNDATION P O BOX 82555 LINCOLN, NE 68501	NONE PC		HRBF BOARD OF DIRECTORS MATCHING GIFT PROGRAM	1,000
UNIVERSITY OF NEBRASKA FOUNDATION P O BOX 82555 LINCOLN, NE 68501	NONE PC		HRBF BOARD OF DIRECTORS MATCHING GIFT PROGRAM	1,250
URBAN NEIGHBORHOOD INITIATIVE 2300 MAIN ST KANSAS CITY, MO 64108	NONE PC		UNI'S FUND DEVELOPMENT SPECIALIST	17,500
VASSAR COLLEGE 161 COLLEGE AVE POUGHKEEPSIE, NY 12538	NONE PC		HRB CORPORATE BOARD MATCHING GIFT PROGRAM	2,500
VIBRANT HEALTH-WYANDOTTE NEIGHBORHOOD CLINICS 21 N 12TH STREET KANSAS CITY, KS 66102	NONE PC		ACTIVITIES TO ACHIEVE FULL FQHC DESIGNATION	30,000
WELCOME HOUSE, INC 1414 E 27TH STREET KANSAS CITY, MO 64108	NONE PC		THE HIRING OF A PROGRAM DIRECTOR	45,000

ATTACHMENT 11

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

ATTACHMENT 11 (CONT'D)

RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR
AND
FOUNDATION STATUS OF RECIPIENT

RECIPIENT NAME AND ADDRESS

PURPOSE OF GRANT OR CONTRIBUTION

AMOUNT

WHITEFISH COMMUNITY FOUNDATION
214 SECOND STREET WEST
WHITEFISH, MT 59937NONE
PC

HRB CORPORATE BOARD MATCHING GIFT PROGRAM

4,000

WOMEN'S EMPLOYMENT NETWORK
4328 MADISON AVENUE
KANSAS CITY, MO 64111NONE
PC

THE DIGITAL CAREER CENTER EXPANSIONS AND UPGRADES

50,000

YOUNG MEN'S CHRISTIAN ASSOCIATION OF METROPOLITAN
1112 16TH STREET NW
WASHINGTON, DC 20036NONE
PC

HRB CORPORATE BOARD MATCHING GIFT PROGRAM

5,000

YOUTH VOLUNTEER CORPS
1025 JEFFERSON STREET
KANSAS CITY, MO 64105NONE
PC

START UP OF THE YVC LEADERSHIP ACADEMY

25,000

TOTAL CONTRIBUTIONS PAID

2,594,242

FORM 990-PF, PART XVI-A - ANALYSIS OF OTHER REVENUE

ATTACHMENT 12				
DESCRIPTION	BUSINESS CODE	AMOUNT	EXCLUSION CODE	RELATED OR EXEMPT FUNCTION INCOME
UNREALIZED GAIN (LOSS) ON INVESTMENTS			14	8,746,009.
TOTALS				8,746,009.

FEDERAL FOOTNOTESFORM 990-PF, PART VIII, LINE 1, OFFICER COMPENSATION
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THE FOUNDATION HAS NO EMPLOYEES. ALL MANAGEMENT SERVICES ARE PROVIDED THROUGH HRB MANAGEMENT, INC. WHO IS PAID A MANAGEMENT FEE AS DISCLOSED IN PART VIII, LINE 3, HIGHLY PAID CONTRACTORS. OFFICERS DAVID P. MILES AND CAREY WILKERSON ARE EMPLOYEES OF AND ARE PAID BY HRB MANAGEMENT, INC. PURSUANT TO THE FORM 990-PF INSTRUCTIONS, THE PORTION OF THE COMPENSATION PAID TO THE MANAGEMENT SERVICES COMPANY (HRB MANAGEMENT, INC.) THAT RELATES TO SERVICES PROVIDED BY THE FOUNDATION OFFICERS IS REPORTED IN PART VIII, LINE 1, OFFICER COMPENSATION AS IF THE FOUNDATION HAD PAID THE OFFICERS DIRECTLY. THE TOTAL AMOUNT PAID TO HRB MANAGEMENT, INC. REPORTED IN PART VIII, LINE 3, HIGHLY PAID CONTRACTORS DOES NOT INCLUDE THE AMOUNT OF OFFICER COMPENSATION SEPARATELY REPORTED IN PART VIII, LINE 1, OFFICER COMPENSATION.

FEDERAL FOOTNOTES

FORM 990-PF, PART XVI-A

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THE FOUNDATION FILES A FEDERAL FORM 990-T TO REPORT NET INCOME OR LOSS FROM UNRELATED BUSINESS INCOME RESULTING FROM INVESTMENTS IN VARIOUS PARTNERSHIPS. THE FOUNDATION ACCOUNTS FOR INVESTMENTS IN PARTNERSHIPS ON A GAAP BASIS, AND THEREFORE DOES NOT RECORD UNRELATED BUSINESS INCOME OR LOSS REPORTED ON TAX SCHEDULE K-1 IN ITS BOOKS AND RECORDS. AS A RESULT, NO UNRELATED BUSINESS INCOME OR LOSS IS REPORTED ON FORM 990-PF PART I, COLUMN A, REVENUE AND EXPENSES PER BOOKS OR ON PART XVI-A, ANALYSIS OF INCOME-PRODUCING ACTIVITIES, COLUMNS (A) AND (B), UNRELATED BUSINESS INCOME.