

For calendar year 2019, or tax year beginning 01-01-2019, and ending 12-31-2019

Name of foundation PHOEBE R & JOHN D LEWIS FOUNDATION C/O R LAUGHLIN WIPFLI		A Employer identification number 31-1401478	
Number and street (or P O box number if mail is not delivered to street address) 469 SECURITY BLVD		Room/suite	B Telephone number (see instructions) (414) 231-9724
City or town, state or province, country, and ZIP or foreign postal code GREEN BAY, WI 54313		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 15,191,910		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) <u>(Part I, column (d) must be on cash basis)</u>			

Part I Analysis of Revenue and Expenses <small>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</small>		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check <input checked="" type="checkbox"/> If the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	34,394	34,394		
	4 Dividends and interest from securities	256,632	256,632		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10 _____	491,349			
	b Gross sales price for all assets on line 6a _____ 1,669,492				
	7 Capital gain net income (from Part IV, line 2)		491,349		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances _____				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	97	97		
	12 Total. Add lines 1 through 11	782,472	782,472		
	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	8,801	2,200		6,601
	b Accounting fees (attach schedule)	1,885	1,414		471
	c Other professional fees (attach schedule)	89,519	89,519		0
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	5,750	0		0
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	25	0		0
	24 Total operating and administrative expenses. Add lines 13 through 23	105,980	93,133		7,072
	25 Contributions, gifts, grants paid	700,000			700,000
	26 Total expenses and disbursements. Add lines 24 and 25	805,980	93,133		707,072
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-23,508			
	b Net investment income (if negative, enter -0-)		689,339		
c Adjusted net income (if negative, enter -0-)					

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			
	2 Savings and temporary cash investments	1,632,904	1,194,894	1,194,894
	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)	6,336,940	6,747,821	13,997,016
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)			
	14 Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15 Other assets (describe ▶ _____)				
16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	7,969,844	7,942,715	15,191,910	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶ _____)			
	23 Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ <input type="checkbox"/> and complete lines 24, 25, 29 and 30.			
	24 Net assets without donor restrictions			
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here ▶ <input checked="" type="checkbox"/> and complete lines 26 through 30.			
	26 Capital stock, trust principal, or current funds	0	0	
	27 Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	28 Retained earnings, accumulated income, endowment, or other funds	7,969,844	7,942,715	
	29 Total net assets or fund balances (see instructions)	7,969,844	7,942,715	
30 Total liabilities and net assets/fund balances (see instructions) .	7,969,844	7,942,715		

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year—Part II, column (a), line 29 (must agree with end-of-year figure reported on prior year's return)	1	7,969,844
2 Enter amount from Part I, line 27a	2	-23,508
3 Other increases not included in line 2 (itemize) ▶ _____	3	0
4 Add lines 1, 2, and 3	4	7,946,336
5 Decreases not included in line 2 (itemize) ▶ _____	5	3,621
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29 .	6	7,942,715

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , 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 PUBLICLY TRADED SECURITIES			
b			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 1,669,492		1,178,143	491,349
b			
c			
d			
e			

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

(i) F M V 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			491,349
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	491,349
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 { }	3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐

Yes

☒

No

If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see 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	633,271	14,075,913	0 044990
2017	547,586	12,980,634	0 042185
2016	520,000	11,598,726	0 044833
2015	586,937	11,534,461	0 050886
2014	466,235	11,061,255	0 042150

2 Total of line 1, column (d)	2	0 225044
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 045009
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	13,963,583
5 Multiply line 4 by line 3	5	628,487
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	6,893
7 Add lines 5 and 6	7	635,380
8 Enter qualifying distributions from Part XII, line 4 ,	8	707,072

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	6,893
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3	Add lines 1 and 2.	3	6,893
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	6,893
6	Credits/Payments		
a	2019 estimated tax payments and 2018 overpayment credited to 2019	6a	10,002
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	0
d	Backup withholding erroneously withheld	6d	0
7	Total credits and payments. Add lines 6a through 6d.	7	10,002
8	Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	0
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	3,109
11	Enter the amount of line 10 to be Credited to 2020 estimated tax ▶ 3,109 Refunded ▶	11	0

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition). <i>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</i>	1b	No
c Did the foundation file Form 1120-POL for this year?	1c	No
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? <i>If "Yes," attach a detailed description of the activities</i>	2	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? <i>If "Yes," attach a conformed copy of the changes</i>	3	Yes
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	No
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T</i>	5	No
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ WI		
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? <i>If "No," attach explanation</i> .	8b	Yes
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 taxable year beginning in 2019? See the instructions for Part XIV. <i>If "Yes," complete Part XIV</i>	9	No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	10	No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions.	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ <u>N/A</u>	13	Yes	
14	The books are in care of ▶ <u>LLOYD EAGAN</u> Telephone no ▶ <u>(414) 231-9724</u>			

Located at ▶ 5205 N IRONWOOD ROAD STE 211 MILWAUKEE WI ZIP+4 ▶ 53217

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here ▶ <input type="checkbox"/>			
	and enter the amount of tax-exempt interest received or accrued during the year ▶ 15			
16	At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
	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.

1a	During the year did the foundation (either directly or indirectly)		Yes	No
	(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.	1b		
	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?	1c		No
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 (lines 6d and 6e, Part XIII) 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).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <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 Schedule C, Form 4720, 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		No
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		No

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

5a	During the year did the foundation pay or incur any amount to		Yes	No
(1)	Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.	<input type="checkbox"/>		
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? If "Yes," attach the statement required by Regulations section 53.4945–5(d)	<input type="checkbox"/> Yes <input type="checkbox"/> No		
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	6b	No
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	7b	
b	If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?			
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 during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		

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

1 List all officers, directors, trustees, 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
LLOYD EAGAN 3421 CONSERVANCY LANE MIDDLETON, WI 53562	PRESIDENT 1 00	0	0	0
THEKLA METZ 1215 GREENLEAF STREET EVANSTON, IL 60602	VICE PRESIDENT 1 00	0	0	0
MEREDITH DEGEN 3518 BLACKHAWK DR MADISON, WI 53705	SECRETARY 1 00	0	0	0
BRADLEY LEWIS 70 SOMERSET STREET BELMONT, MA 02478	TREASURER 1 00	0	0	0
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000.				0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)
3 Five highest-paid independent contractors for professional services (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. ►		0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1	
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	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3 ►	0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities.	1a	12,457,717
b	Average of monthly cash balances.	1b	1,718,509
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	14,176,226
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	14,176,226
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	212,643
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	13,963,583
6	Minimum investment return. Enter 5% of line 5.	6	698,179

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	698,179
2a	Tax on investment income for 2019 from Part VI, line 5.	2a	6,893
b	Income tax for 2019 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	6,893
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	691,286
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	691,286
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	691,286

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	707,072
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	707,072
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	6,893
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	700,179

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				691,286
2 Undistributed income, if any, as of the end of 2019				
a Enter amount for 2018 only.			688,371	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2019				
a From 2014.				
b From 2015.				
c From 2016.				
d From 2017.				
e From 2018.				
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2019 from Part XII, line 4 ▶ \$ <u>707,072</u>				
a Applied to 2018, but not more than line 2a			688,371	
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.				18,701
e Remaining amount distributed out of corpus	0			
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	0			
b Prior years' undistributed income Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2018 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2019 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2020				672,585
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).	0			
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a	0			
10 Analysis of line 9				
a Excess from 2015.				
b Excess from 2016.				
c Excess from 2017.				
d Excess from 2018.				
e Excess from 2019.				

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

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

b Check box to indicate whether the organization 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))

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

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

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

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

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

c Any submission deadlines

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

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

Recipient	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 <i>Paid during the year</i> See Additional Data Table				
Total			▶ 3a	700,000
b <i>Approved for future payment</i>				
Total			▶ 3b	0

Enter gross amounts unless otherwise indicated

[illegible]

Part XVII

	Yes	No
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1a(1)	No
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1a(2)	No
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1b(1)	No
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1b(2)	No
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1b(3)	No
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1b(4)		No
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1b(5)		No
--------------	--	-----------

1b(6)	No
--------------	-----------

1c		No
-----------	--	-----------

value
ue

[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

2020-04-09

May the IRS discuss this return with the preparer shown

Title

(see instr) ☒ Yes ☐ No

Paid Preparer Use Only	Print/Type preparer's name RYAN LAUGHLIN CPA	Preparer's Signature	Date 2020-04-09	Check if self-employed <input type="checkbox"/>	PTIN P00674586
	Firm's name ▶ WIPFLI LLP				Firm's EIN ▶ 39-0758449
	Firm's address ▶ PO BOX 12237 GREEN BAY, WI 543072237				Phone no (920) 662-0016

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
AUDOBON MASS - HABITAT 10 JUNIPER RD BELMONT, MA 02478	NONE	PC	PROGRAM SUPPORT	1,000
ARIZONA LAND AND WATER TRUST 2810 N ALVERNON WAY 600 TUSCON, AZ 85712	NONE	PC	PROGRAM SUPPORT	5,000
BANCROFT HOUSEPO BOX 344 FRANCONIA, NH 03580	NONE	PC	BARN PROJECT	2,500
Total ▶ 3a				700,000

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
BEAVER COUNTRY DAY SCHOOL 791 HAMMOND ST CHESTNUT HILL, MA 02467	NONE	PC	ANNUAL FUND	7,500
BELMONT DAY SCHOOL 55 DAY SCHOOL LN BELMONT, MA 02478	NONE	PC	ANNUAL FUND AND PLEDGE PAYMENT	30,000
BELMONT FOOD PANTRYPO BOX 291 BELMONT, MA 02476	NONE	PC	PROGRAM SUPPORT	2,500
Total ▶ 3a				700,000

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
CLEAN LAKES ALLIANCE 150 E GILMAN ST MADISON, WI 53703	NONE	PC	WATERSHED PROTECTION AND RESTORATION	20,000
CONNECTIONS FOR THE HOMELESS 2121 DEWEY AVE EVANSTON, IL 60201	NONE	PC	PROGRAM SUPPORT	7,500
COLGATE13 OAK DR HAMILTON, NY 13346	NONE	PC	PROGRAM SUPPORT	35,000
Total ▶ 3a				700,000

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
COPPER CANNONPO BOX 124 FRANCONIA, NH 03580	NONE	PC	COPPER CANNON CAMP	5,000
CRADLES TO CRAYONS 155 N BEACON ST BRIGHTON, MA 02135	NONE	PC	BOSTON AREA PROGRAM SUPPORT	5,000
CROSSRAODS119 MYRTLE ST DUXBURY, MA 02332	NONE	PC	C5 NEW ENGLAND LEADERS	5,000
Total ▶ 3a				700,000

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
ENVIROMENTAL DEFENSE FUND 257 PARK AVE S NEW YORK, NY 20020	NONE	PC	PROGRAM SUPPORT	10,000
FAMILY PROMISE CHICAGO NORTH SHORE 1417 HINMAN AVE EVANSTON, IL 60201	NONE	PC	PROGRAM SUPPORT	6,500
FAMILY SUPPORT AND RESOURCE CENTER 101 NOB HILL RD MADISON, WI 53713	NONE	PC	PROGRAM SUPPORT	5,000
Total ▶ 3a				700,000

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
GLOBAL VOICES INIATIVE 9757 SOUTH BELL CHICAGO, IL 60643	NONE	PC	PROGRAM SUPPORT	3,500
GROUNDSWELL CONSERVANCY 303 PATERSON ST MADISON, WI 53703	NONE	PC	PROGRAM SUPPORT	10,000
JAMES B MORAN CENTER 1990 A DEMPSTER ST EVANSTON, IL 60201	NONE	PC	PROGRAM SUPPORT	7,500
Total ▶ 3a				700,000

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
INTERNATIONAL CRANE FOUNDATION PO BOX 447 BARABOO, WI 53913	NONE	PC	PROGRAM SUPPORT	10,000
LAFAYETTE COLLETE DEVELOPMENT OFFICE BOX 3000 EASTON, PA 18042	NONE	PC	ANNUAL FUND	7,500
LOOMIS CHAFFEE SCHOOL 4 BATCHELDER RD WINDSOR, CT 06095	NONE	PC	NEO RENOVATION PROJECT	60,000
Total ► 3a				700,000

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
LOOMIS CHAFFEE SCHOOL 4 BATCHELDER RD WINDSOR, CT 06095	NONE	PC	PLEDGE PAYMENT	15,000
MADISON AUDUBON SOCIETY 1400 E WASHINGTON AVE 170 MADISON, WI 53703	NONE	PC	LAND ACQUISITION AND MAINTENANCE	30,000
MADISON COMMUNITY FOUNDATION 111 N FAIRCHILD ST SUITE 260 MADISON, WI 53703	NONE	PC	NAMI, APT, FOPBC, LITERACY NETWORK	35,000
Total ▶ 3a				700,000

Form 990PF Part XV Line 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				
MADISON COMMUNITY FOUNDATION 111 N FAIRCHILD ST SUITE 260 MADISON, WI 53703	NONE	PC	PLANNED PARENTHOOD FUND, PORCHLIGHT FUND	40,000
MARTHA'S VINEYARD MUSEUM 151 LAGOON POND RD VINEYARD HAVEN, MA 02568	NONE	PC	PROGRAM SUPPORT	75,000
MEALS ON WHEELS NORTHEASTERN ILLINOIS 1723 SIMPSON ST EVANSTON, IL 60201	NONE	PC	PROGRAM SUPPORT	100,000
Total ▶ 3a				700,000

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
NATIONAL OUTDOOR LEADARSHIP SCHOOL 284 LINCOLN ST LANDER, WY 82520	NONE	PC	JOHN D LEWIS SCHOLARSHIP FUND	15,000
NATIONAL OUTDOOR LEADARSHIP SCHOOL 284 LINCOLN ST LANDER, WY 82520	NONE	PC	SUMMER SEARCH BOSTON PROGRAM	30,000
NELSON INST FOR ENV STUDIES 550 N PARK ST MADISON, WI 53706	NONE	PC	PROGRAM SUPPORT	20,000
Total ▶ 3a				700,000

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
NEW PEPERTORY THEATRE 321 ARSENAL ST WATERTOWN, MA 02472	NONE	PC	PROGRAM SUPPORT	1,500
ONE CITY EARLY LEARNING CENTER 2012 FISHER ST MADISON, WI 53713	NONE	PC	PROGRAM SUPPORT	30,000
PINEY WOODS SCHOOL 5096 HIGHWAY 49 SOUTH PINEY WOODS, MS 39148	NONE	PC	ANNNUAL FUND	25,000
Total ► 3a				700,000

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
REFUGEEONE 4753 N BROADWAY ST 401 CHICAGO, IL 60640	NONE	PC	PROGRAM SUPPORT	5,000
SUFFIELD ACADEMY185 N MAIN ST SUFFIELD, CT 06078	NONE	PC	ANNUAL FUND	20,000
THE CHILDREN'S ROOM 1210 MASSACHUSETTS AVE ARLINGTON, MA 02476	NONE	PC	PROGRAM SUPPORT	2,500
Total ▶ 3a				700,000

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
U OF CHICAGO-DEPT OF RADIOLOGY 1215 GREENLEAF ST CHICAGO, IL 60637	NONE	PC	PROGRAM SUPPORT	10,000
Total ▶ 3a				700,000

TY 2019 Accounting Fees Schedule**Name:** PHOEBE R & JOHN D LEWIS FOUNDATION

C/O R LAUGHLIN WIPFLI

EIN: 31-1401478

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREPARATION FEE	1,885	1,414		471

TY 2019 Investments Corporate Stock Schedule

Name: PHOEBE R & JOHN D LEWIS FOUNDATION
C/O R LAUGHLIN WIPFLI
EIN: 31-1401478

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ACCENTURE PLC SHS CL A NEW - 2740 SHS	79,639	576,962
ALPHABET INC CAP STK CL C - 335 SHS	88,107	447,902
ALPHABET INC CAP STK CL A - 335 SHS	88,658	448,696
COSTCO WHOLESALE CORP - 1400 SHS	217,126	411,488
FASTENAL CO - 4720 SHS	58,848	174,404
HOME DEPOT INC - 2250 SHS	205,828	491,355
PAYPAL HLDGS INC - 2965 SHS	92,387	320,724
PNC FINANCIAL SERVICES GROUP - 3365 SHS	208,308	537,155
S.W. AIRL CO COM - 8105 SHS	209,377	437,508
SCHWAB CHARLES CORP COM NEW - 9970 SHS	371,075	474,173
T ROWE PRICE GROUP INC - 3695 SHS	294,860	450,199
TJX COS INC COM - 9360 SHS	106,151	571,522
UNITEDHEALTH GROUP INC - 2110 SHS	134,364	620,298
VISA INC COM CL A STK - 4025 SHS	64,161	756,298
PK NATIONAL CORP COM - 7232 SHS	307,483	740,412
ABBOTT LAB - 2050 SHS	49,713	178,063
ABBVIE INC COM - 1690 SHS	167,510	149,633
ADOBE SYS INC - 700 SHS	53,134	230,867
ALEXION PHARMACEUTICALS INC - 1250 SHS	151,534	135,188
ALPHABET INC A - 160 SHS	68,404	214,302
AMER ELEC PWR CO INC - 2200 SHS	146,542	207,922
APTIV PLC - 2110 SHS	160,091	200,387
AT&T INC - 4580 SHS	128,941	178,986
BOEING CO COM - 450 SHS	160,049	146,592
BROADCOM INC - 750 SHS	165,160	237,015
CHEVRON CORP - 1100 SHS	70,794	132,561
CISCO SYSTEMS INC - 3950 SHS	179,304	189,442
COCA COLA CO - 2990 SHS	159,832	165,496
D R HORTON INC - 3700 SHS	151,494	195,175
DANAHER CORP - 1500 SHS	42,406	230,220

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
DOMINION ENERGY INC - 2170 SHS	100,557	179,719
DOWDUPONT INC - 3450 SHS	158,500	188,818
DUKE ENERGY CORP NEW - 2400 SHS	184,493	218,904
EOG RESOURCES INC - 2000 SHS	178,706	167,520
FACEBOOK INC - 1000 SHS	123,898	205,250
FEDEX CORP - 1000 SHS	116,091	151,210
INTERCONTINENTAL EXCHANGE INC COM - 2450 SHS	116,337	226,747
JOHNSON & JOHNSON COM - 1050 SHS	118,780	153,163
KEYSIGHT TECHNOLOGIES INC - 1290 SHS	130,893	132,393
KINDER MORGAN INC - 8000 SHS	144,276	169,360
MERCK & CO INC NEW - 2080 SHS	78,234	189,176
MICROSOFT CORP COM - 1400 SHS	38,654	220,780
ORACLE CORP - 3750 SHS	117,368	198,675
PFIZER INC - 4950 SHS	113,074	193,941
PROGRESSIVE CORP - 2250 SHS	147,527	162,877
RAYTHEON CO - 850 SHS	181,134	186,779
THERMO FISHER CORP - 450 SHS	23,033	146,191
TYSON FOODS INC - 2040 SHS	160,087	185,722
UNITEDHEALTH GROUP INC - 700 SHS	75,613	205,786
VISA INC COM CL A - 1400 SHS	59,286	263,060

TY 2019 Legal Fees Schedule

Name: PHOEBE R & JOHN D LEWIS FOUNDATION
C/O R LAUGHLIN WIPFLI

EIN: 31-1401478

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ATTORNEY FEES	8,801	2,200		6,601

TY 2019 Other Decreases Schedule**Name:** PHOEBE R & JOHN D LEWIS FOUNDATION

C/O R LAUGHLIN WIPFLI

EIN: 31-1401478**Description****Amount**

BROKERAGE BASIS ADJUSTMENTS

3,621

TY 2019 Other Expenses Schedule

Name: PHOEBE R & JOHN D LEWIS FOUNDATION
C/O R LAUGHLIN WIPFLI

EIN: 31-1401478

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OTHER EXPENSE	25	0		0

TY 2019 Other Income Schedule

Name: PHOEBE R & JOHN D LEWIS FOUNDATION

C/O R LAUGHLIN WIPFLI

EIN: 31-1401478

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
CLASS ACTION SETTLEMENT	97	97	97

TY 2019 Other Professional Fees Schedule

Name: PHOEBE R & JOHN D LEWIS FOUNDATION
C/O R LAUGHLIN WIPFLI

EIN: 31-1401478

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MGT FEE	89,519	89,519		0

TY 2019 Taxes Schedule

Name: PHOEBE R & JOHN D LEWIS FOUNDATION
C/O R LAUGHLIN WIPFLI

EIN: 31-1401478

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ESTIMATED EXCISE TAX PAID - CURRENT YEAR	5,750	0		0