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Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

▶ Do not enter social security numbers on this form as it may be made public.
▶ Go to www.irs.gov/Form990PF for instructions and the latest information.

1912

OMB No. 1545-0052
2019
Open to Public Inspection

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

Name of foundation: SCHIMBERG FAMILY CHARITABLE FOUNDATION

A Employer identification number: 31-1581894

Number and street (or P.O. box number if mail is not delivered to street address): 1715 E MCMILLAN STREET | Room/suite:

B Telephone number (see instructions): (513)821-4040

City or town, state or province, country, and ZIP or foreign postal code: CINCINNATI OH 45206

C If exemption application is pending, check here ▶ ☐

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

D 1. Foreign organizations, check here. ▶ ☐
2. Foreign organizations meeting the 85% test, check here and attach computation. ▶ ☐

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

04

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

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ $ 291,293

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

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

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

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)				
	2 Check ▶ ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temp. cash investments				
	4 Dividends and interest from securities	3,386	3,433		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain/(loss) from sale of assets not on line 10	6,546			
	b Gross sales price for all assets on line 6a 70,384				
	7 Capital gain net income (from Part IV, line 2)		6,546		
	8 Net short-term capital gain			0	
	9 Income modifications			0	
	10a Gross sales less returns & allowances 0				
	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)			0	
	12 **Total.** Add lines 1 through 11	9,932	9,979		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule) #1	350			
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions) #2	113			
	19 Depreciation (attach sch.) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)				
	24 **Total operating and administrative expenses.** Add lines 13 through 23	463	0	0	0
	25 Contributions, gifts, grants paid	7,835			7,835
	26 **Total exp. & disbursements.** Add lines 24 and 25	8,298	0	0	7,835
	27 Subtract line 26 from line 12				
	a **Excess of revenue over expenses and disbursements**	1,634			
	b **Net investment income** (if neg., enter -0-)		9,979		
	c **Adjusted net income** (if neg., enter -0-)				

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Part II Balance Sheets

		Attached schedules and amounts in the description column should be for end-of-year amounts only. (See inst.)	Beginning of year (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
Assets	1	Cash -- non-interest-bearing	1,696	1,071	1,071
	2	Savings and temporary cash investments	1,209	2,915	2,915
	3	Accounts receivable ▶			
		Less allowance for doubtful accts. ▶			
	4	Pledges receivable ▶			
		Less allowance for doubtful accts. ▶			
	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 govt. obligations (attach schedule)			
	b	Investments -- corporate stock (attach schedule) #3	128,229	125,680	287,307
	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)	131,134	129,666	291,293
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	**Total liabilities** (add lines 17 through 22)	0	0	
Net Assets or Fund Balances		**Foundations that follow FASB ASC 958, check here ▶ ☐ and complete lines 24, 25, 29, and 30.**			
	24	Net assets without donor restrictions			
	25	Net assets with donor restrictions			
		Foundations that do not follow FASB ASC 958, check here and complete lines 26 through 30. ▶ ☒			
	26	Capital stock, trust principal, or current funds			
	27	Paid-in or capital surplus, or land, bldg, and equipment fund			
	28	Retained earnings, accumulated income, endowment, or other funds	131,134	129,666	
	29	**Total net assets or fund balances** (see instructions)	131,134	129,666	
	30	**Total liabilities and net assets/fund balances** (see instructions)	131,134	129,666	

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	131,134
2	Enter amount from Part I, line 27a	2	1,634
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	132,768
5	Decreases not included in line 2 (itemize) ▶ SEE ATTACHMENT #4	5	3,102
6	Total net assets or fund balances at end of year (line 4 minus line 5) -- Part II, column (b), line 29	6	129,666

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse, or common stock, 200 shs. MLC Co.)	(b) How acquired P -- Purchase D -- Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	SEE ATTACHMENT #5			
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	6,546
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c). See instructions If (loss), enter -0- in Part I, line 8	3	0

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

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

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col. (c))
2018	10,423		
2017	10,423		
2016	6,612	146,769	0.045050
2015	17,428	140,146	0.124356
2014	20,226	127,844	0.158208

2	**Total** of line 1, column (d)	2	0.327614
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	0.065523
4	Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	283,143
5	Multiply line 4 by line 3	5	18,552
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	100
7	Add lines 5 and 6	7	18,652
8	Enter qualifying distributions from Part XII, line 4	8	7,835

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ [ ] and enter "N/A" on line 1. Date of ruling or determination letter ______ (attach copy of letter if necessary -- see inst.)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ [ ] and enter 1% of Part I, line 27b		1	200
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	200
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	200
6	Credits/Payments			
a	2019 estimated tax payments and 2018 overpayment credited to 2019	6a		
b	Exempt foreign organizations -- tax withheld at source	6b		
c	Tax paid with application for extension of time to file (Form 8868)	6c		
d	Backup withholding erroneously withheld	6d		
7	Total credits and payments. Add lines 6a through 6d		7	0
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	200
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶		10	
11	Enter the amount of line 10 to be **Credited to 2020 estimated tax** ▶ **Refunded** ▶		11	

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		x
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition	1b		x
	If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c	Did the foundation file **Form 1120-POL** for this year?	1c		x
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year **(1)** On the foundation. ▶ $ 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	2		x
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		x
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		x
b	If "Yes," has it filed a tax return on **Form 990-T** for this year? N/A	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.	5		x
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either ● By language in the governing instrument, or ● By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X	
7	Did the foundation have at least $5,000 in assets at any time during the yr.? If "Yes," complete Part II, col. (c), & Part XV	7		x
8a	Enter the states to which the foundation reports or with which it is registered. See instructions. ▶ OH			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	8b		x
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2019 or the taxable year beginning in 2019? See the instructions for Part XIV. If "Yes," complete Part XIV	9		x
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		x

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Part VII-A Statements Regarding Activities (continued)

		Line	Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement See instructions	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ N/A

14 The books are in care of ▶ SEE ATTACHMENT #7 Telephone no. ▶

Located at ▶ ZIP+4 ▶

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

		Line	Yes	No
16	At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		X
	See the instructions for exceptions and filing requirements for FinCEN Form 114 If "Yes," enter the name of the foreign country ▶			

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

	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.	Line	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	1b		X
	Organizations relying on a current notice regarding disaster assistance, check here ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2019?	1c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2019, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2019? ☐ Yes ☒ No			
	If "Yes," list the years ▶ 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		X
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ 20 ___ , 20 ___ , 20 ___ , 20 ___			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2019 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969, **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019.)	3b		X
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2019?	4b		X

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

			Yes	No
5a	During the year, did the foundation pay or incur any amount to:			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No			
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No			
	(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No			
	(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions ☐ Yes ☒ No			
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No			
b	If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions N/A	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? N/A ☐ 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? N/A	7b		
8	Is the foundation subject to the section 4960 tax on payment(s) of more than $1,000,000 in remuneration or excess parachute payment(s) during the year? ☐ Yes ☒ No			

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE ATTACHMENT #8				

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 ▶		

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 ▶	

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	275,629
b	Average of monthly cash balances	1b	11,826
c	Fair market value of all other assets (see instructions)	1c	
d	**Total** (add lines 1a, b, and c)	1d	287,455
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	287,455
4	Cash deemed held for charitable activities. Enter 1 1/2 % of line 3 (for greater amount, see instructions)	4	4,312
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	283,143
6	**Minimum investment return.** Enter 5% of line 5	6	14,157

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	14,157
2a	Tax on investment income for 2019 from Part VI, line 5	2a	200		
b	Income tax for 2019. (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	200
3	Distributable amount before adjustments Subtract line 2c from line 1			3	13,957
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	13,957
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	13,957

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	7,835
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	7,835
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	7,835

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				13,957
2	Undistributed income, if any, as of the end of 2019				
a	Enter amount for 2018 only			10,480	
b	Total for prior years 20___, 20___, 20___				
3	Excess distributions carryover, if any, to 2019				
a	From 2014: 13,950				
b	From 2015: 10,525				
c	From 2016				
d	From 2017				
e	From 2018				
f	**Total** of lines 3a through e	24,475			
4	Qualifying distributions for 2019 from Part XII, line 4 ▶ $ 7,835				
a	Applied to 2018, but not more than line 2a.				
b	Applied to undistributed income of prior years (Election required -- see instructions)				
c	Treated as distributions out of corpus (Election required -- see instructions)				
d	Applied to 2019 distributable amount				
e	Remaining amount distributed out of corpus				
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	24,475			
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			10,480	
f	Undistributed income for 2019. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020				13,957
7	Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required--see instructions)				
8	Excess distributions carryover from 2014 not applied on line 5 or line 7 (see instructions)				
9	**Excess distributions carryover to 2020.** Subtract lines 7 and 8 from line 6a	24,475			
10	Analysis of line 9				
a	Excess from 2015: 10,525				
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 foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			
	(a) 2019	(b) 2018	(c) 2017	(d) 2016	(e) Total
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					0
b 85% of line 2a					0
c Qualifying distributions from Part XII, line 4, for each year listed					0
d Amounts included in line 2c not used directly for active conduct of exempt activities					0
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					0
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test -- enter (1) Value of all assets					0
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					0
b "Endowment" alternative test -- enter 2/3 of min investment return shown in Part X, line 6, for each year listed					0
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)					0
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					0
(3) Largest amount of support from an exempt organization					0
(4) Gross investment income					0

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).)

NONE

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

NONE

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

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

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

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

c Any submission deadlines

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

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
SEE ATTACHMENT #9				
Total . . . ▶ **3a**				7,835
b Approved for future payment				
Total . . ▶ **3b**				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Excl. code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income (See instructions)
1 Program service revenue.					
a					
b					
c					
d					
e					
f					
g Fees & contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	3,386	
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	6,546	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue. a					
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)		0		9,932	0

13 **Total.** Add line 12, columns (b), (d), and (e) . . . 13 9,932

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

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)
	/

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

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of			
	(1) Cash	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

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

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

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

b If "Yes," complete the following schedule

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

Sign Here

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

Lee Schimberg | 5/4/20 | Vice President

Signature of officer or trustee | Date | 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	Preparer's signature	Date	Check ☐ if self-employed	PTIN
CAROL MILLER	Carol Miller	05/04/2020		P00080024
Firm's name ▶ HRB TAX GROUP INC			Firm's EIN ▶ 431871840	
Firm's address ▶ 8041 HOSBROOK RD STE 400			Phone no. (513) 984-6795	

2019 FORM 990 SCHEDULE OF ACCOUNTING FEES

ATTACHMENT 1: PAGE 1 - 990-PF PAGE 1, PART I, LINE 16B

OPEN TO PUBLIC INSPECTION | For calendar year 2019, or tax period beginning , and ending

Name of Organization: SCHIMBERG FAMILY CHARITABLE FOUNDATION

Employer Identification Number: 31-1581894

Accounting Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charity
H& R BLOCK	350			
Total:	350			

2019 FORM 990 SCHEDULE OF TAXES PAID

ATTACHMENT 2: PAGE 1 - 990- PF PAGE 1, PART I, LINE 18

OPEN TO PUBLIC INSPECTION | For calendar year 2019, or tax period beginning , and ending

Name of Organization: SCHIMBERG FAMILY CHARITABLE FOUNDATION

Employer Identification Number: 31-1581894

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charity
FEDERAL EXISE TAX	113			
Total:	113			

2019 FORM 990 SCHEDULE OF INVESTMENTS - CORPORATE STOCKS

ATTACHMENT 3: PAGE 1 - 990-PF PAGE 2, PART II, LINE 10B

OPEN TO PUBLIC INSPECTION | For calendar year 2019, or tax period beginning , and ending .

Name of Organization: SCHIMBERG FAMILY CHARITABLE FOUNDATION

Employer Identification Number: 31-1581894

Description of Property	Cost	FMV at Year End	Book Value	Fair Market Value
CHARLES SCHWAB			125,680	287,307
Total:			125,680	287,307

2019 FORM 990 SCHEDULE OF OTHER DECREASES

ATTACHMENT 4: PAGE 1 - 990- PF PAGE 2, PART III, LINE 5

OPEN TO PUBLIC INSPECTION

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

Name of Organization	Employer Identification Number
SCHIMBERG FAMILY CHARITABLE FOUNDATION	31-1581894

Description of Decrease	Total Amount
ADJUSTMENT TO COST BASIS	3,102
Total:	3,102

2019 FORM 990 PART IV CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

ATTACHMENT 5: PAGE 1 - 990-PF PAGE 3, PART IV, LINE 1

OPEN TO PUBLIC INSPECTION — For calendar year 2019, or tax period beginning , and ending

Name of Organization: SCHIMBERG FAMILY CHARITABLE FOUNDATION

Employer Identification Number: 31-1581894

	(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	RUSSELL EQUITY GROWTH STRATEGY FD	D		04-10-2019
2	RUSSELL EQUITY GROWTH STRATEGY	D		04-10-2019

	(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)
1	56,112		49,930	6,182
2	14,272		13,908	364

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) Gain Minus Col. (k), But Not Less Than -0-) or Losses (from col. (h))
	(i) F.M.V. as of 12/31/69	(j) Adjusted Basis as of 12/31/69	(k) Excess if Col. (i) Over Col. (j), if Any	
1				6,182
2				364

EXPLANATION OF FAILURE TO FURNISH STATE ATTORNEY GENERAL WITH. COPY OF 990-PF

ATTACHMENT 6: PAGE 1 - 990-PF PAGE 4, PART VII-A, LINE 8B

OPEN TO PUBLIC INSPECTION	For calendar year 2019, or tax period beginning , and ending .

Name of Organization	Employer Identification Number
SCHIMBERG FAMILY CHARITABLE FOUNDATION	31-1581894

Explanation

IN LIEU OF FURNISHING A COPY OF FORM 990-PF TO THE OHIO ATTORNEY GENERAL, THE ORGANIZATION WILL FILE AN ANNUAL REPORT WITH THE ATTORNEY GENERAL'S OFFICE

2019 FORM 990 BOOKS ARE IN CARE OF

ATTACHMENT 7 - 990-PF PAGE 5, PART VII-A, LINE 14

OPEN TO PUBLIC INSPECTION	For calendar year 2019, or tax period beginning , and ending

Name of Organization	Employer Identification Number
SCHIMBERG FAMILY CHARITABLE FOUNDATION	31-1581894

Part VII-A - Line 14

Individual Name or Business Name: LEE SCHIMBERG

Street Address: 1715 E MC MILLAN STREET
1715 E MC MILLAN STREET

U.S. Address

Zip code 45206 City CINCINNATI State OH

or

Foreign Address

City

Province or State

Country

Postal code

Phone Number (513)821-4040

Fax Number

2019 FORM 990 CURRENT OFFICERS, DIRECTORS, TRUSTEES, AND KEY EMPLOYEES

ATTACHMENT 8: PAGE 1 - 990-PF PAGE 6, PART VIII

OPEN TO PUBLIC INSPECTION

For calendar year 2019, or tax period beginning , and ending .

Name of Organization: SCHIMBERG FAMILY CHARITABLE FOUNDATION

Employer Identification Number: 31-1581894

(A) Name and Address	(B) Title and Average Hrs per Week	(C) Compensation (If not paid, enter 0)	(D) Cont. to Employee Ben. Plans & Def Comp	(E) Expense Account & Other Allowances
MARTHA SCHIMBERG 1715 E MC MILLAN STREET CINCINNATI, OH 45206	PRESIDENT 1.00			
LEE SCHIMBERG 1715 E MC MILLAN STREET CINCINNATI, OH 45206	VICE PRESIDENT 1.00			
DAVID SCHIMBERG 1715 E MC MILLAN WALNUT HILLS, OH 45206	SEC/TREAS 1.00			

2019 FORM 990 GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 9: PAGE 1 990-PF PAGE 11, PART XV LINE 3A

OPEN TO PU INSPECTION | For calendar year 2019, or tax period beginning , and ending .

Name of Organization	Employer Identification Number
SCHIMBERG FAMILY CHARITABLE FOUNDATION	31-1581894

Recipient Name and Address (home or business)	If Recipient is an Individual, Show any Relationship to Any Foundation Manager or Substantial Contributor	Foundation Status of Recipient	Purpose of Grant or Contribution	Amount
JUVENILE DIABETES FOUNDATION 26 BROADWAY 14TH FLOOR NEW YORK NY 10004	NONE	PC	GENERAL OPERATIONS	100
CINCINNATI ZOO AND BOTANICAL GARDENS 3400 VINE STREET CINCINNATI OH 45220	NONE	PC	GENERAL OPERATIONS	175
ACTIVITIES BEYOND THE CLASSROO, 635 W 7TH ST STE 301 CINCINNATI OH 45203	NONE	PC	GENERAL OPERATIONS	100
PLANNED PARENTHOOD 784 HERCULES DR COLCHESTER VT 05446	NONE	PC	GENERAL OPERATIONS	25
WCET 48 1223 CENTRAL PARKWAY CINCINNATI OH 45214	NONE	PC	GENERAL OPERATIONS	120
MAYERSON JCC 8485 RIDGE RD BLUE ASH OH 45236	NONE	PC	GENERAL OPERATIONS	180
AMERICAN JEWISH COMMITTEE 205 W 4TH ST 1270 CINCINNATI OH 45202	NONE	PC	GENERAL OPERATIONS	100
MOST VALUABLE KIDS 7530 FERNWOOD DR AMBERLEY OH 45237	NONE	PC	GENERAL OPERATIONS	100
ENSEMBLE THEATRE 1127 VINE STREET CINCINNATI OH 45202	NONE	PF	GENERAL OPERATIONS	250
NEW HAMPSHIRE PUBLIC RADIO 2 PILLSBURY ST 6TH FLOOR CONCORD NH 03301	NONE	PC	GENERAL OPERATIONS	50
SUMMER MUSIC ASSOCIATES P O BOX 603 NEW LONDON NH 03257	NONE	PC	GENERAL OPERATIONS	350
			Total:	1,550

2019 FORM 990 GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 9: PAGE 2 990-PF PAGE 11, PART XV LINE 3A

OPEN TO PU
INSPECTION For calendar year 2019, or tax period beginning , and ending

Name of Organization: SCHIMBERG FAMILY CHARITABLE FOUNDATION

Employer Identification Number: 31-1581894

Recipient Name and Address (home or business)	If Recipient is an Individual, Show any Relationship to Any Foundation Manager or Substantial Contributor	Foundation Status of Recipient	Purpose of Grant or Contribution	Amount
FREEDA KAY HOUSE 8499 RIDGE RD BLUE ASH OH 45236	NONE	PC	GENERAL OPERATIONS	25
ASLPT 71 S PLEASANT ST NEW LONDON NH 03257	NONE	PC	GENERAL OPERATIONS	200
LINTON INC 1241 ELM STREET CINCINNATI OH 45202	NONE	PC	GENERAL OPERATIONS	330
TALBERT HOUSE 710 TUSCULUM AVE CINCINNATI OH 45226	NONE	PC	GENERAL OPERATIONS	25
SUMMER MUSIC ASSOCIATION P O BOX 603 NEW LONDON NH 03257	NONE	PC	GENERAL OPERATIONS	150
NEWBURY PUBLLIC LIBRARY FOUNDATION P O BOX 622 NEWBURY NH 03255	NONE	PC	GENERALL OPERATIONS	50
GRAD CINCINNATI 1500 BROADWAY STE1101 NEW YORK NY 10036	NONE	PC	GENERAL OPERATIONS	100
HOLOCAUST & HUMANITIES CENTER 8401 MONRGOMERY ROAD CINCINNATI OH 45236	NONE	PC	GENERAL OPERATIONS	100
VERMONT PUBLIC RADIO 365 TROY AVE COLCHESTER VT 05446	NONE	PC	GENERAL OPERATIONS	50
CINCINNATI BALLET 1555 CENTRAL PARKWAY CINCINNATI OH 45214	NONE	PC	GENERAL OPERATIONS	100
JEWISH FAMILY SERVICES 8487 RIDGE ROAD BLUE ASH OH 45236	NONE	PC	GENERAL OPERATIONS	100
THE HILLSIDE TRUST 710 TUSCULUM AVE	NONE	PC	GENERAL OPERATIONS	
			Total:	1,230

2019 FORM 990 GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 9: PAGE 3 990-PF PAGE 11, PART XV LINE 3A

OPEN TO PU
INSPECTION For calendar year 2019, or tax period beginning , and ending

Name of Organization: SCHIMBERG FAMILY CHARITABLE FOUNDATION

Employer Identification Number: 31-1581894

Recipient Name and Address (home or business)	If Recipient is an Individual, Show any Relationship to Any Foundation Manager or Substantial Contributor	Foundation Status of Recipient	Purpose of Grant or Contribution	Amount
CINCINNATI OH 45226				100
FAMILIES FOR FAMILIES P O BOX 9560 CINCINNATI OH 45209	NONE	PC	GENERAL OPERATIONS	100
POWER INSPIRES PROGRESS 1301 VINE STREET CINCINNATI OH 45202	NONE	PC	GENERAL OPERATIONS	100
CAMP NEBAGAMON SCHOLARSHIP FUND P O BOX 331 EAST TROY WI 53120	NONE	PC	GENERAL OPERATIONS	100
AMERICAN JEWISH WORLD SERVICE 45 W 36TH ST 11 NEW YORK NY 10018	NONE	PC	GENERAL OPERATIONS	100
ASLPT 71 S PLEASANT ST NEW LONDON NH 03257	NONE	PC	GENERAL OPERATIONS	150
PLANNED PARENTHOOD 784 HERCULES DR COLCHESTER VT 05446	NONE	PC	GENERAL OPERATIONS	25
HARVARD CLUB OF CINCINNATI 644 WATCHPOINT CINCINNATI OH 45208	NONE	PC	GENERAL OPERATIONS	55
OLLO/UC FOUNDATION 51 GOODMAN DR CINCINNATI OH 45221	NONE	PC	GENERAL OPERATIONS	50
DARTMOUTH COLLEGE 6066 DEVELOPMENT OFFICE HANOVER NH 03755	NONE	PC	GENERAL OPERATIONS	240
HUC-SKIRBALL MUSEUM 3101 CLIFTON AVE CINCINNATI OH 45220	NONE	PC	GENERAL OPERATIONS	100
MIZPAH CONGREGATION 923 MCCATHE AVE CHATTANOOGA TN 37403	NONE	PF	GENERAL OPERATIONS	25
			Total:	1,145

2019 FORM 990 GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 9: PAGE 4 990-PF PAGE 11, PART XV LINE 3A

OPEN TO PU
INSPECTION For calendar year 2019, or tax period beginning , and ending

Name of Organization: SCHIMBERG FAMILY CHARITABLE FOUNDATION

Employer Identification Number: 31-1581894

Recipient Name and Address (home or business)	If Recipient is an Individual, Show any Relationship to Any Foundation Manager or Substantial Contributor	Foundation Status of Recipient	Purpose of Grant or Contribution	Amount
ROCKDALE TEMPLE 8501 RIDGE AVE CINCINNATI OH 45236	NONE	PC	GENERAL OPERATIONS	50
ISSAC M WISE TEMPLE 720 PLUM ST CINCINNATI OH 45202	NONE	PC	GENERAL OPERATIONS	25
JEWISH GEN INC 36 BATTERY PLACE NEW YORK NY 10280	NONE	PC	GENERAL OPERATIONS	100
CINCINNATI CHILDRENS HOSPITAL 3333 BURNET AVE AVONDALE OH 45229	NONE	PC	GENERAL OPERATIONS	200
NEW LONDON HOSPITAL 273 COUNTY ROAD NEW LONDON NH 03257	NONE	PC	GENERAL OPERATIONS	100
MARY REIS SULLIVAN SCHOLARSHIP FUND 54 RED BANK RD CINCINNATI OH 45227	NONE	PC	GENERAL OPERATIONS	25
ILLINOIS HOLCAUST MUSEUM 9603 WOODS DR SKOKIE IL 60077	NONE	PC	GENERAL OPERATIONS	25
CINCINNATI ART MUSEUM 953 EDEN PARK DR CINCINNATI OH 45202	NONE	PC	GENERAL OPERATIONS	75
PLANNED PARENTHOOD 784 HERCULES DR COLCHESTER VT 05446	NONE	PC	GENERAL OPERATIONS	25
LIGHTHOUSE YOUTH & FAMILY 401 E MCMILLAN ST CINCINNATI OH 45206	NONE	PC	GENERAL OPERATIONS	100
THE FELLS 456 ROUTE 1034 P O BOX 276 MOUNT SUNAPEE NH 03255	NONE	PC	GENERAL OPERATIONS	60
			Total:	785

2019 FORM 990 GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 9: PAGE 5 990-PF PAGE 11, PART XV LINE 3A

OPEN TO PU INSPECTION For calendar year 2019, or tax period beginning , and ending .

Name of Organization	Employer Identification Number
SCHIMBERG FAMILY CHARITABLE FOUNDATION	31-1581894

Recipient Name and Address (home or business)	If Recipient is an Individual, Show any Relationship to Any Foundation Manager or Substantial Contributor	Foundation Status of Recipient	Purpose of Grant or Contribution	Amount
TAFT MUSEUM OF ART 316 PIKE STREET CINCINNATI OH 45202	NOEN	PC	GENERAL OPERATIONS	75
LIGHTHOUSE YOUTH & FAMILY 401 E MCMILLAN ST CINCINNATI OH 45206	NONE	PC	GENERAL OPERATIONS	25
ARTSWAVE 20 E CENTRAL PARKWAY CINCINNATI OH 45202	NONE	PC	GENERAL OPERATIONS	1,000
JDRF 26 BROADWAY 14TH FLOOR NEW YORK NY 10004	NONE	PC	GENERAL OPERATIONS	350
AMERICAN JEWISH COMMITTEE 205 W 4TH ST 1270 CINCINNATI OH 45202	NONE	PC	GENERAL OPERATIONS	250
ARTWORKS 20 E CENTRAL PARKWAY CINCINNATI OH 45202	NONE	PC	GENERAL OPERATIONS	100
NATIONAL UNDERGROUND FREEDOM CENTER 50 E FREEDOM WAY CINCINNATI OH 45202	NONE	PC	GENERAL OPERATIONS	100
E WALNUT HILLS ASSEMBLY P O BOX 68050 CINCINNATI OH 45206	NONE	PC	GENERAL OPERATIONS	40
CRAYONS TO COMPUTERS 1350 TENNESSEE AVE AVONDALE OH 45229	NONE	PC	GENERAL OPERATIONS	250
OPERA NORTH 20 WEST PARK ST LOWER LEVEL LEBANON NH 03766	NONE	PC	GENERAL OPERATIONS	100
CINCINNATI OPERA 30 GARFIELD PLACE 800 CINCINNATI OH 45202	NONE	PC	GENERAL OPERATIONS	100
SANTA FE SYMPHONY 301 GRIFFIN ST	NONE	PC	GENERAL OPERATIONS	
			Total:	2,390

2019 FORM 990 GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 9: PAGE 6 990-PF PAGE 11, PART XV LINE 3A

OPEN TO PU
INSPECTION For calendar year 2019, or tax period beginning , and ending

Name of Organization	Employer Identification Number
SCHIMBERG FAMILY CHARITABLE FOUNDATION	31-1581894

Recipient Name and Address (home or business)	If Recipient is an Individual, Show any Relationship to Any Foundation Manager or Substantial Contributor	Foundation Status of Recipient	Purpose of Grant or Contribution	Amount
SANTA FE NM 87501				250
LAKE SUNEPEE PROTECTIVE ASSOCIATION 63 MAIN ST SUNAPEE NH 03782	NONE	PC	GENERAL OPERATIONS	250
UC FOUNDATION/OLLI 51 GOODMAN DR CINCINNATI OH 45221	NONE	PC	GENERAL OPERATIONS	100
HARVARD MAGAZINE 7 WARE STREET CAMBRIDGE MA 02138	NONE	PC	GENERAL OPERATIONS	35
HARVARD COLLEGE FUND 7 WARE STREET CAMBRIDGE MA 02138	NONE	PC	GENERAL OPERATIONS	100
			Total:	735