

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

OMB No. 1545-0047

2019

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

Open to Public Inspection

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

Name of foundation: **SCHULER FAMILY FOUNDATION**

Number and street (or P O box number if mail is not delivered to street address): **8551 La Jolla Shores Drive**

Room/suite: _____

City or town, state or province, country, and ZIP or foreign postal code: **La Jolla, CA 92037-3044**

A Employer identification number: **33-0753301**

B Telephone number (see instructions): **858-260-0604**

C If exemption application is pending, check here **6**

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

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

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

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

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

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ **685,501**

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

03
04

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)				
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	16,921	16,921		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	(41)			
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)		0		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less: Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule)					
12 Total. Add lines 1 through 11	16,880	16,880			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	1500	150		1350
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	11,232.00			
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	191	191		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	192	19		211
	24 Total operating and administrative expenses. Add lines 13 through 23	1883	210		1561
	25 Contributions, gifts, grants paid	31,460			31,460
26 Total expenses and disbursements. Add lines 24 and 25	33,343	210		33,021	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	(16,463)				
b Net investment income (if negative, enter -0-)		16,674			
c Adjusted net income (if negative, enter -0-)			N/A		

042322 U 221 APR 28 21

569094

SCANNED NOV 03 2021
Operating and Administrative Expenses

016

GB

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	5881	17,525	17,525
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶ Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶ Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments—U.S. and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)	259,202	234,877	667,976
	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 l)	265,083	252,402	685,501	
Liabilities	17 Accounts payable and accrued expenses		1520	
	18 Grants payable	240	2500	
	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)	240	4020	
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 type="checkbox"/> 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	264,843	248,382	
29 Total net assets or fund balances (see instructions)	264,843	248,382		
30 Total liabilities and net assets/fund balances (see instructions)	265,083	252,402		

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	264,843
2 Enter amount from Part I, line 27a		2	(16,463)
3 Other increases not included in line 2 (itemize) ▶		3	
4 Add lines 1, 2, and 3		4	248,380
5 Decreases not included in line 2 (itemize) ▶		5	
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29		6	248,380

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 for details				
b TOTAL				
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 24,285		24,326	(41)	
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.				(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any		
a				
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	(41)	
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 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	31,495	580,826	.054224
2017	30,228	590,796	.051250
2016	23,518	461,541	.050955
2015	18,968	392,086	.048377
2014	20,680	404,999	.051062

2 Total of line 1, column (d)	2	2.55868
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	051174
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	638,709
5 Multiply line 4 by line 3	5	32,685
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	167
7 Add lines 5 and 6	7	32,852
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.	8	33,021

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

Table with 11 rows for excise tax calculations. Includes sub-rows 6a-6d for credits and payments. Total amount owed is 167.

Part VII-A Statements Regarding Activities

Table with 10 rows for activity statements. Includes questions about political campaigns, expenditures, and state reporting. Includes handwritten '2' next to row 9.

Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions		✓
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		✓
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶	✓	
14 The books are in care of ▶ <u>Evlyn A Lightner Baez</u> Telephone no. ▶ <u>858-260-0604</u> Located at ▶ <u>8553 La Jolla Shores Drive, La Jolla, CA</u> ZIP+4 ▶ <u>92037-3044</u>		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here and enter the amount of tax-exempt interest received or accrued during the year ▶ 15		<input type="checkbox"/>
16 At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ▶		✓

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

	Yes	No
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		
1a During the year, did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions Organizations relying on a current notice regarding disaster assistance, check here ▶ <input type="checkbox"/>	1b	
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	✓
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):		
a At the end of tax year 2019, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2019? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ 20____, 20____, 20____, 20____		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions.)	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 Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019.)	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	✓
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	✓

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:

(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 Yes No

Organizations relying on a current notice regarding disaster assistance, check here

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? Yes No

If "Yes," attach the statement required by Regulations section 53.4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? Yes No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? Yes No

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? Yes No

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
John W. Lightner 8551 La Jolla Shores Drive, La Jolla, CA 92037-3044	President/.1			
Evelyn A. Lightner Baez 8553 La Jolla Shores Drive, La Jolla, CA 92037-3044	Treasurer/1			
Dawna C. Chuss 2657 Palace Drive, San Diego, CA 92123	Secretary/.1			
Bonni S. Cogan P.O. Box 397, Borrego Springs, CA 92004	Director/ 01			

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				
Continuation of Part VIII, 1 from above				
Sherri S. Lightner 8553 La Jolla Shores Drive, La Jolla, CA 92037-3044	Director/ 01			

Total number of other employees paid over \$50,000 NONE

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	Not applicable	
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	Not applicable	
2		
3	All other program-related investments. See instructions	

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	635,293
b	Average of monthly cash balances	1b	13,143
c	Fair market value of all other assets (see instructions)	1c	648,436
d	Total (add lines 1a, b, and c)	1d	
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	648,436
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	9727
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	638,709
6	Minimum investment return. Enter 5% of line 5	6	31,935

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	31,935
2a	Tax on investment income for 2019 from Part VI, line 5	2a	167
b	Income tax for 2019. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	167
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	32,102
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	32,102
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	32,102

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	33,021
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	33,021
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	33,021

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				32,102
2 Undistributed income, if any, as of the end of 2019:				
a Enter amount for 2018 only			0	
b Total for prior years: 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2019				
a From 2014	123			
b From 2015				
c From 2016	701			
d From 2017	1070			
e From 2018	4674			
f Total of lines 3a through e	6568			
4 Qualifying distributions for 2019 from Part XII, line 4: ▶ \$ <u>33,021</u>				
a Applied to 2018, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions)		0		
c Treated as distributions out of corpus (Election required—see instructions)	0			
d Applied to 2019 distributable amount				32,102
e Remaining amount distributed out of corpus	919			
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	7487			
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				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(h)(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	7487			
10 Analysis of line 9:				
a Excess from 2015	0			
b Excess from 2016	701			
c Excess from 2017	1070			
d Excess from 2018	4674			
e Excess from 2019	1159			

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			(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)				
<p>a <i>Paid during the year</i> See attachment</p>				31,460
Total ▶				3a 31,460
<p>b <i>Approved for future payment</i></p>				
Total ▶				3b

SCHULER FAMILY FOUNDATION
CY 2018 EIN: 33-0753301

Form 990-PF, Part I, Line 18

Taxes	
CA Form 199	\$25
IRS Form 990-PF	\$166
Total	\$191

Form 990-PF, Part I, Line 23

Other Expenses	
BUD ADR Pass Thru Fee	\$43
BUD Foreign Tax Paid	\$129
Meeting Expenses	\$0
Office Expenses	\$20
Total	\$192

Form 990-PF, PART II, Line 10b

Investments – Corporate Stock	BOY/EOY Shares	BOY Book Value	EOY Book Value	EOY FMV
ABBV	20/0	\$1,277	\$0	\$0
ABT	20/0	\$841	\$0	\$0
ASIX	17/0	\$239	\$0	\$0
BUD	215/90	\$24,060	\$10,072	\$7,384
CVX	240/240	\$24,006	\$24,006	\$28,922
GTX	43/0	\$489	\$0	\$0
HON	430/430	\$43,603	\$43,603	\$76,110
JNJ	1920/1920	\$68,722	\$68,722	\$280,070
LLY	380/300	\$29,412	\$23,220	\$39,429
PG	1890/1890	\$65,254	\$65,254	\$236,061
REZI	71/0	\$1,299	\$0	\$0
Total		\$259,202	\$234,877	\$667,976

SCHULER FAMILY FOUNDATION
CY 2018 EIN:33-0753301
Form 990-PF, Part IV, Line 1

Stock Label	Stock	(b)	(c)	(d)	(e)	(f)	(g)	(h)
1a	20 shs ABT	P	09/01/16	11/25/19	\$1,690		\$841	\$849
1b	20 shs ABBV	P	09/01/16	11/25/19	\$1,738		\$1,277	\$461
1c	11 8 shs ASIX	P	08/21/16	11/25/19	\$241		\$159	\$82
1d	5 2 shs ASIX	P	09/01/16	11/25/19	\$106		\$80	\$26
1e	30 shs GTX	P	08/21/16	11/25/19	\$321		\$328	-\$7
1f	13 shs GTX	P	09/01/16	11/25/19	\$139		\$162	-\$23
1g	49 3333 shs REZI	P	08/21/16	11/25/19	\$500		\$866	-\$366
1h	21 6666 shs REZI	P	09/01/16	11/25/19	\$220		\$433	-\$213
1i	125 shs BUD	P	08/21/15	12/02/19	\$9,929		\$13,988	-\$4,059
1j	80 shs LLY	P	09/01/16	12/02/19	\$9,401		\$6,192	\$3,209
Total					\$24,285		\$24,326	-\$41

SCHULER FAMILY FOUNDATION
CY 2018 EIN: 33-0753301

Form 990-PF, Part X, Line 1a

Average Monthly FMV of Securities	Beg of Mo	End of Mo	Average
January	\$568,243	\$594,947	\$581,595
February	\$594,947	\$614,591	\$604,769
March	\$614,591	\$636,012	\$625,302
April	\$636,012	\$645,537	\$640,775
May	\$645,537	\$611,373	\$628,455
June	\$611,373	\$646,493	\$628,933
July	\$646,393	\$645,393	\$645,893
August	\$645,393	\$640,773	\$643,083
September	\$640,773	\$652,733	\$646,753
October	\$652,733	\$656,390	\$654,562
November	\$656,390	\$661,215	\$658,803
December	\$661,215	\$667,976	\$664,596
Total			\$7,623,517
Average = Total divided by 12			\$635,293

Form 990-PF, Part X, Line 1b

Average of Monthly Cash Balances	Beg of Mo	End of Mo	Average
January	\$5,881	\$5,642	\$5,762
February	\$5,642	\$7,027	\$6,335
March	\$7,027	\$9,640	\$8,334
April	\$9,640	\$9,643	\$9,642
May	\$9,643	\$11,083	\$10,363
June	\$11,083	\$13,938	\$12,511
July	\$13,938	\$13,751	\$13,845
August	\$13,751	\$15,191	\$14,471
September	\$15,191	\$17,901	\$16,546
October	\$17,901	\$17,903	\$17,902
November	\$17,903	\$24,298	\$21,101
December	\$24,298	\$17,525	\$20,912
Total			\$157,720
Average = Total divided by 12			\$13,143

SCHULER FAMILY FOUNDATION
CY 2018 EIN: 33-0753301
Form 990-PF, Part XV, 3a

Recipient	EIN	Relation	Status	Purpose	2019 Amt
American Legion Auxiliary Unit #853 PO Box 116, Borrego Springs, CA 92004	33-0865328	None	EOF	Need	\$240
American Legion Borrego Springs Post 853 PO Box 2653, Borrego Springs, CA 92004	33-0767897	None	PC	Need	\$1,500
Anza Borrego Desert Natural History Association PO Box 310, Borrego Springs, CA 92004	23-7107105	None	PC	Need	\$2,000
Anza-Borrego Foundation PO Box 2001, Borrego Springs, CA 92004	33-0334338	None	EOF	Need	\$1,000
Barnes Cemetery Association 2461 Route 666, Sheffield, PA 16347	25-1122988	None	EOF	Need	\$2,000
Borrego Festivals Foundation PO Box 756, Borrego Springs, CA 92004	46-1232990	None	EOF	Need	\$12,500
Borrego Springs Civic Foundation PO Box 1164, Borrego Springs, CA 92004	51-0171857	None	EOF	Need	\$1,000
Borrego Springs Youth and Senior Center PO Box 1362, Borrego Springs, CA	23-7155196	None	PC	Need	\$3,000
Boys and Girls Club PO Box 671, Borrego Springs, CA 92004	95-1865988	None	PC	Need	\$2,500
Christmas Circle Community Park PO Box 1025, Borrego Springs, CA 92004	91-1774674	None	PC	Need	\$2,000
Mira Mesa/Scripps Ranch RSVP 8450-A Mira Mesa Blvd., San Diego, CA 92126	33-0638711	None	EOF	Need	\$1,500
Scripps Ranch Theater 10755-F Scripps Poway Pkwy 187, San Diego, CA 92131	91-1997458	None	PC	Need	\$240
Sheffield Depot Preservation Society PO Box 671, Sheffield, PA 16347	33-1130592	None	PC	Need	\$500
Sheffield Volunteer Fire Department & Ambulance Service PO Box 551, Sheffield, PA 16347	51-0598884	None	PC	Need	\$1,000
Warren County Historical Society 210 Fourth Ave, PO Box 427, Warren, PA 16365	25-6059123	None	PC	Need	\$240
Washington and Jefferson College 60 South Lincoln St., Washington, PA 15301	25-0965601	None	PC	Need	\$240
Total					\$31,460