

Form **990-PF**  
 Department of the Treasury  
 Internal Revenue Service

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

OMB No. 1545-0052

**2019**

**Open to Public Inspection**

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 ▶ **Go to [www.irs.gov/Form990PF](http://www.irs.gov/Form990PF) for instructions and the latest information.**

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

Name of foundation EDGAR AND ROBERTA MULZER FOUNDATION		<b>A Employer identification number</b> 35-2049784	
Number and street (or P.O. box number if mail is not delivered to street address) 315 SEVENTH AVENUE NORTH	Room/suite	<b>B Telephone number</b> (see instructions) (239) 821-6667	
City or town, state or province, country, and ZIP or foreign postal code NAPLES, FL 34102		<b>C</b> If exemption application is pending, check here <input type="checkbox"/>	
<b>G</b> Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		<b>D 1.</b> Foreign organizations, check here..... <input type="checkbox"/> <b>2.</b> Foreign organizations meeting the 85% test, check here and attach computation ... <input type="checkbox"/>	
<b>H</b> 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		<b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here ..... <input type="checkbox"/>	
<b>I</b> Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ <u>6,112,685</u>		<b>J</b> Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)	
		<b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ..... <input type="checkbox"/>	

<b>Part I Analysis of Revenue and Expenses</b> <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)
<b>Revenue</b>	<b>1</b> Contributions, gifts, grants, etc., received (attach schedule)				
	<b>2</b> Check <input checked="" type="checkbox"/> if the foundation is <b>not</b> required to attach Sch. B				
	<b>3</b> Interest on savings and temporary cash investments	47,157	42,157	47,157	
	<b>4</b> Dividends and interest from securities	98,799	98,799	98,799	
	<b>5a</b> Gross rents				
	<b>b</b> Net rental income or (loss)				
	<b>6a</b> Net gain or (loss) from sale of assets not on line 10	226,474			
	<b>b</b> Gross sales price for all assets on line 6a	1,201,774			
	<b>7</b> Capital gain net income (from Part IV, line 2)		226,474		
	<b>8</b> Net short-term capital gain			859	
	<b>9</b> Income modifications				
	<b>10a</b> Gross sales less returns and allowances				
<b>b</b> Less: Cost of goods sold					
<b>c</b> Gross profit or (loss) (attach schedule)					
<b>11</b> Other income (attach schedule)					
<b>12 Total.</b> Add lines 1 through 11	372,430	367,430	146,815		
<b>Operating and Administrative Expenses</b>	<b>13</b> Compensation of officers, directors, trustees, etc.	14,000			14,000
	<b>14</b> Other employee salaries and wages				
	<b>15</b> Pension plans, employee benefits				
	<b>16a</b> Legal fees (attach schedule)				
	<b>b</b> Accounting fees (attach schedule)	5,105	5,105		
	<b>c</b> Other professional fees (attach schedule)	25,624	25,624		
	<b>17</b> Interest				
	<b>18</b> Taxes (attach schedule) (see instructions)	4,163	4,163		
	<b>19</b> Depreciation (attach schedule) and depletion				
	<b>20</b> Occupancy				
	<b>21</b> Travel, conferences, and meetings				
	<b>22</b> Printing and publications				
	<b>23</b> Other expenses (attach schedule)	597	104		493
	<b>24 Total operating and administrative expenses.</b> Add lines 13 through 23	49,489	34,996		14,493
	<b>25</b> Contributions, gifts, grants paid	314,475			314,475
<b>26 Total expenses and disbursements.</b> Add lines 24 and 25	363,964	34,996		328,968	
<b>27</b> Subtract line 26 from line 12:					
<b>a Excess of revenue over expenses and disbursements</b>	8,466				
<b>b Net investment income</b> (if negative, enter -0-)		332,434			
<b>c Adjusted net income</b> (if negative, enter -0-)			146,815		

**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
<b>Assets</b>	<b>1</b> Cash—non-interest-bearing . . . . .	265,633	250,924	250,924
	<b>2</b> Savings and temporary cash investments . . . . .			
	<b>3</b> Accounts receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	<b>4</b> Pledges receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	<b>5</b> Grants receivable . . . . .			
	<b>6</b> Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .			
	<b>7</b> Other notes and loans receivable (attach schedule) ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	<b>8</b> Inventories for sale or use . . . . .			
	<b>9</b> Prepaid expenses and deferred charges . . . . .	2,860	3,000	3,000
	<b>10a</b> Investments—U.S. and state government obligations (attach schedule)	652,074	636,972	649,645
	<b>b</b> Investments—corporate stock (attach schedule) . . . . .	3,380,652	3,489,527	4,959,226
	<b>c</b> Investments—corporate bonds (attach schedule) . . . . .	298,399	222,702	241,605
	<b>11</b> Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
	<b>12</b> Investments—mortgage loans . . . . .			
	<b>13</b> Investments—other (attach schedule) . . . . .			
	<b>14</b> Land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
<b>15</b> Other assets (describe ▶ _____)		8,285	8,285	
<b>16 Total assets</b> (to be completed by all filers—see the instructions. Also, see page 1, item I)	4,599,618	4,611,410	6,112,685	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses . . . . .			
	<b>18</b> Grants payable . . . . .			
	<b>19</b> Deferred revenue . . . . .			
	<b>20</b> Loans from officers, directors, trustees, and other disqualified persons			
	<b>21</b> Mortgages and other notes payable (attach schedule) . . . . .			
	<b>22</b> Other liabilities (describe ▶ _____)			
	<b>23 Total liabilities</b> (add lines 17 through 22) . . . . .		0	
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow FASB ASC 958, check here</b> <input checked="" type="checkbox"/> <b>and complete lines 24, 25, 29 and 30.</b>			
	<b>24</b> Net assets without donor restrictions . . . . .	4,599,618		
	<b>25</b> Net assets with donor restrictions . . . . .			
	<b>Foundations that do not follow FASB ASC 958, check here</b> <input type="checkbox"/> <b>and complete lines 26 through 30.</b>			
	<b>26</b> Capital stock, trust principal, or current funds . . . . .			
	<b>27</b> Paid-in or capital surplus, or land, bldg., and equipment fund			
	<b>28</b> Retained earnings, accumulated income, endowment, or other funds			
<b>29 Total net assets or fund balances</b> (see instructions) . . . . .	4,599,618	4,611,410		
<b>30 Total liabilities and net assets/fund balances</b> (see instructions) .	4,599,618	4,611,410		

**Part III Analysis of Changes in Net Assets or Fund Balances**

<b>1</b> 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) . . . . .	<b>1</b>	4,599,618
<b>2</b> Enter amount from Part I, line 27a . . . . .	<b>2</b>	8,466
<b>3</b> Other increases not included in line 2 (itemize) ▶ _____	<b>3</b>	4,171
<b>4</b> Add lines 1, 2, and 3 . . . . .	<b>4</b>	4,612,255
<b>5</b> Decreases not included in line 2 (itemize) ▶ _____	<b>5</b>	845
<b>6</b> Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29 .	<b>6</b>	4,611,410

**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.)
<b>1a</b> See Additional Data Table				
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b>				
(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)	
<b>a</b> See Additional Data Table				
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b>				
(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
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))	
<b>a</b> See Additional Data Table				
<b>b</b>				
<b>c</b>				
<b>d</b>				
<b>e</b>				
<b>2</b> 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 }			<b>2</b> 226,474
<b>3</b> 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	{ If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8 }			<b>3</b> 859

**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	278,128	5,546,381	0.05015
2017	284,579	4,953,079	0.05746
2016	253,805	5,127,851	0.04950
2015	258,604	5,178,474	0.04994
2014	244,395	5,184,347	0.04714
<b>2</b> Total of line 1, column (d)			<b>2</b> 0.254175
<b>3</b> 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			<b>3</b> 0.050835
<b>4</b> Enter the net value of noncharitable-use assets for 2019 from Part X, line 5			<b>4</b> 5,890,651
<b>5</b> Multiply line 4 by line 3			<b>5</b> 299,451
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)			<b>6</b> 3,324
<b>7</b> Add lines 5 and 6			<b>7</b> 302,775
<b>8</b> Enter qualifying distributions from Part XII, line 4			<b>8</b> 328,968

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)

Table with 11 rows for excise tax calculation. Includes questions about exempt foundations, tax under section 511, and tax due. Total tax due is 333.

Part VII-A Statements Regarding Activities

Table with 10 rows for statements regarding activities. Includes questions about political campaigns, political expenditures, and state reporting requirements.

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

<b>11</b>	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. . . . .		<b>No</b>
<b>12</b>	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 . . . . .		<b>No</b>
<b>13</b>	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ <u>N/A</u>	<b>Yes</b>	
<b>14</b>	The books are in care of ▶ <u>DONALDSON CAPITAL MGT</u> Telephone no. ▶ <u>(239) 821-6667</u> Located at ▶ <u>20 NW FIRST ST 5TH FL EVANSVILLE IN</u> ZIP+4 ▶ <u>47708</u>		
<b>15</b>	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> —check here . . . . . ▶ <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year . . . . . ▶ <u>15</u>		
<b>16</b>	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 ▶	<b>Yes</b>	<b>No</b>

**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.**

		<b>Yes</b>	<b>No</b>
<b>1a</b>	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? ( <b>Exception.</b> 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>b</b>	If any answer is "Yes" to 1a(1)–(6), did <b>any</b> 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 . . . . . <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here. . . . . ▶ <input type="checkbox"/>	<b>1b</b>	<b>No</b>
<b>c</b>	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? . . . . .	<b>1c</b>	<b>No</b>
<b>2</b>	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)):		
<b>a</b>	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>b</b>	Are there any years listed in 2a for which the foundation is <b>not</b> 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 <b>all</b> years listed, answer "No" and attach statement—see instructions.) . . . . .	<b>2b</b>	
<b>c</b>	If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here. ▶ 20____, 20____, 20____, 20____		
<b>3a</b>	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>b</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.) . . . . .	<b>3b</b>	
<b>4a</b>	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	<b>4a</b>	<b>No</b>
<b>b</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?	<b>4b</b>	<b>No</b>

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

<b>5a</b> During the year did the foundation pay or incur any amount to:		<b>Yes</b>	<b>No</b>
(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>b</b> If any answer is "Yes" to 5a(1)–(5), did <b>any</b> 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.	<input type="checkbox"/>		
Organizations relying on a current notice regarding disaster assistance check here.	<input type="checkbox"/>		
<b>c</b> 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? <i>If "Yes," attach the statement required by Regulations section 53.4945–5(d).</i>	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
<b>6a</b> 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
<b>b</b> Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <i>If "Yes" to 6b, file Form 8870.</i>	<input type="checkbox"/>		
<b>7a</b> 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
<b>b</b> If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?	<input type="checkbox"/>		
<b>8</b> 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
See Additional Data Table				

**2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."**

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

**Total number of other employees paid over \$50,000.**

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**

<b>3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".</b>		
(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
<b>1</b>	
<b>2</b>	
<b>3</b>	
<b>4</b>	

**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
<b>1</b>	
<b>2</b>	
All other program-related investments. See instructions.	
<b>3</b>	
Total. Add lines 1 through 3 . . . . . ▶	

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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b>	Average monthly fair market value of securities. . . . .	<b>1a</b>	5,797,411
<b>b</b>	Average of monthly cash balances. . . . .	<b>1b</b>	182,945
<b>c</b>	Fair market value of all other assets (see instructions). . . . .	<b>1c</b>	0
<b>d</b>	<b>Total</b> (add lines 1a, b, and c). . . . .	<b>1d</b>	5,980,356
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation). . . . .	<b>1e</b>	0
<b>2</b>	Acquisition indebtedness applicable to line 1 assets. . . . .	<b>2</b>	
<b>3</b>	Subtract line 2 from line 1d. . . . .	<b>3</b>	5,980,356
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions). . . . .	<b>4</b>	89,705
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	5,890,651
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5. . . . .	<b>6</b>	294,533

**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.)

<b>1</b>	Minimum investment return from Part X, line 6. . . . .	<b>1</b>	294,533
<b>2a</b>	Tax on investment income for 2019 from Part VI, line 5. . . . .	<b>2a</b>	3,324
<b>b</b>	Income tax for 2019. (This does not include the tax from Part VI.). . . . .	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b. . . . .	<b>2c</b>	3,324
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1. . . . .	<b>3</b>	291,209
<b>4</b>	Recoveries of amounts treated as qualifying distributions. . . . .	<b>4</b>	
<b>5</b>	Add lines 3 and 4. . . . .	<b>5</b>	291,209
<b>6</b>	Deduction from distributable amount (see instructions). . . . .	<b>6</b>	
<b>7</b>	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1. . . . .	<b>7</b>	291,209

**Part XII Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b>	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26. . . . .	<b>1a</b>	328,968
<b>b</b>	Program-related investments—total from Part IX-B. . . . .	<b>1b</b>	
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes. . . . .	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b>	Suitability test (prior IRS approval required). . . . .	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule). . . . .	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	328,968
<b>5</b>	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. . . . .	<b>5</b>	3,324
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4. . . . .	<b>6</b>	325,644

**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
<b>1</b> Distributable amount for 2019 from Part XI, line 7				291,209
<b>2</b> Undistributed income, if any, as of the end of 2019:				
<b>a</b> Enter amount for 2018 only. . . . .			203,771	
<b>b</b> Total for prior years: 20___, 20___, 20___				
<b>3</b> Excess distributions carryover, if any, to 2019:				
<b>a</b> From 2014. . . . .				
<b>b</b> From 2015. . . . .				
<b>c</b> From 2016. . . . .				
<b>d</b> From 2017. . . . .				
<b>e</b> From 2018. . . . .				
<b>f</b> Total of lines 3a through e. . . . .				
<b>4</b> Qualifying distributions for 2019 from Part XII, line 4: ▶ \$ <u>328,968</u>				
<b>a</b> Applied to 2018, but not more than line 2a			203,771	
<b>b</b> Applied to undistributed income of prior years (Election required—see instructions). . . . .				
<b>c</b> Treated as distributions out of corpus (Election required—see instructions). . . . .	0			
<b>d</b> Applied to 2019 distributable amount. . . . .				125,197
<b>e</b> Remaining amount distributed out of corpus				
<b>5</b> Excess distributions carryover applied to 2019. (If an amount appears in column (d), the same amount must be shown in column (a).)				
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b . . . . .				
<b>c</b> 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. . . . .				
<b>d</b> Subtract line 6c from line 6b. Taxable amount—see instructions . . . . .				
<b>e</b> Undistributed income for 2018. Subtract line 4a from line 2a. Taxable amount—see instructions . . . . .				
<b>f</b> Undistributed income for 2019. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020 . . . . .				166,012
<b>7</b> 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). . . . .				
<b>8</b> Excess distributions carryover from 2014 not applied on line 5 or line 7 (see instructions). . . . .				
<b>9</b> Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a . . . . .				
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2015. . . . .				
<b>b</b> Excess from 2016. . . . .				
<b>c</b> Excess from 2017. . . . .				
<b>d</b> Excess from 2018. . . . .				
<b>e</b> 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)

**2a** Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed . . . . .

	Tax year	Prior 3 years			(e) Total
	(a) 2019	(b) 2018	(c) 2017	(d) 2016	
<b>b</b> 85% of line 2a . . . . .					
<b>c</b> Qualifying distributions from Part XII, line 4 for each year listed . . . . .					
<b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities . . . . .					
<b>e</b> Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c . . . . .					
<b>3</b> Complete 3a, b, or c for the alternative test relied upon:					
<b>a</b> "Assets" alternative test—enter:					
<b>(1)</b> Value of all assets . . . . .					
<b>(2)</b> Value of assets qualifying under section 4942(j)(3)(B)(i)					
<b>b</b> "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . . . .					
<b>c</b> "Support" alternative test—enter:					
<b>(1)</b> Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) . . . . .					
<b>(2)</b> Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . . .					
<b>(3)</b> Largest amount of support from an exempt organization					
<b>(4)</b> 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 e-mail address of the person to whom applications should be addressed:  
 THE EDGAR ROBERTA MULZER FOUNDATION  
 PO BOX 307  
 TELL CITY, IN 47586  
 (812) 547-2808

**b** The form in which applications should be submitted and information and materials they should include:  
 THERE IS NO FORMAL APPLICATION PROCESS

**c** Any submission deadlines:  
 NONE

**d** Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:  
 NONE

**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)				
<b>a</b> <i>Paid during the year</i> See Additional Data Table				
<b>Total . . . . .</b>			<b>▶ 3a</b>	314,475
<b>b</b> <i>Approved for future payment</i>				
<b>Total . . . . .</b>			<b>▶ 3b</b>	





**Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d**

List and describe the kind(s) of property sold (e.g., real estate, <b>(a)</b> 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	<b>(b)</b> How acquired P—Purchase D—Donation	<b>(c)</b> Date acquired (mo., day, yr.)	<b>(d)</b> Date sold (mo., day, yr.)
50000 BALTIMORE CNTY MD PUB IMPT BDS	P	2019-05-21	2019-11-01
325 ILLINOIS TOOL WORKS INC COM	P	2019-01-01	2019-08-06
100000 US TREASURY SENIOR NOTE	P	2018-12-04	2019-01-31
50000 UTAH COUNTY UTAH TRANSN SALES	P	2019-01-14	2019-12-01
150 ABBVIE INC COM	P	2011-08-23	2019-01-29
475 AIR PRODUCTS & CHEMICALS INC	P	2013-05-30	2019-09-10
425 AMGEN INC COM	P	2000-01-01	2019-04-16
134 APPLE INC COM	P	2016-02-03	2019-12-23
100000 BETHEL PARK PA SCH DIST	P	2010-01-23	2019-08-01
75000 CITIGROUP INC NOTE PERP	P	2016-05-23	2019-03-05

**Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h**

<b>(e)</b> Gross sales price	<b>(f)</b> Depreciation allowed (or allowable)	<b>(g)</b> Cost or other basis plus expense of sale	<b>(h)</b> Gain or (loss) (e) plus (f) minus (g)
50,000		50,000	
47,732		46,873	859
100,000		100,000	
50,000		50,000	
11,616		3,883	7,733
101,927		41,200	60,727
81,241		69,632	11,609
38,014		12,951	25,063
100,000		100,000	
76,090		74,813	1,277

**Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l**

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			<b>(l)</b> Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
<b>(i)</b> F.M.V. as of 12/31/69	<b>(j)</b> Adjusted basis as of 12/31/69	<b>(k)</b> Excess of col. (i) over col. (j), if any	
			859
			7,733
			60,727
			11,609
			25,063
			1,277

**Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d**

List and describe the kind(s) of property sold (e.g., real estate, (a) 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.)
600 ENBRIDGE INC CO	P	2016-03-17	2019-06-11
775 EXXON MOBIL CORP COM	P	2018-01-10	2019-06-11
120 ILLINOIS TOOL WORKS INC COM	P	2017-09-19	2019-08-06
400 INTERNATIONAL BUS MACH CORP	P	2016-09-28	2019-06-11
200 JPMORGAN CHASE & CO COM	P	2000-01-01	2019-02-12
4000 JPMORGAN CHASE & CO COM	P	2000-01-01	2019-03-01
825 MICROSOFT CORP COM	P	2000-01-01	2019-02-12
325 ONEOK IN COM	P	2017-10-24	2019-04-30
450 PFIZER INC COM	P	2000-01-01	2019-01-28
650 STARBUCKS CORP COM	P	2017-11-20	2019-08-06

**Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h**

(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)
21,036		18,939	2,097
58,494		67,259	-8,765
17,624		17,741	-117
54,404		63,288	-8,884
20,555		7,301	13,254
100,000		101,703	-1,703
88,050		24,010	64,040
22,015		16,772	5,243
17,852		15,486	2,366
61,872		36,881	24,991

**Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l**

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 of col. (i) over col. (j), if any	
			2,097
			-8,765
			-117
			-8,884
			13,254
			-1,703
			64,040
			5,243
			2,366
			24,991

**Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d**

List and describe the kind(s) of property sold (e.g., real estate, <b>(a)</b> 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	<b>(b)</b> How acquired P—Purchase D—Donation	<b>(c)</b> Date acquired (mo., day, yr.)	<b>(d)</b> Date sold (mo., day, yr.)
775 STARBUCKS CORP COM	P	2017-11-20	2019-09-10
150 MEDTRONIC PLC COM	P	2017-05-31	2019-04-25

**Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h**

<b>(e)</b> Gross sales price	<b>(f)</b> Depreciation allowed (or allowable)	<b>(g)</b> Cost or other basis plus expense of sale	<b>(h)</b> Gain or (loss) (e) plus (f) minus (g)
70,286		43,974	26,312
12,966		12,594	372

**Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l**

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			<b>(l)</b> Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
<b>(i)</b> F.M.V. as of 12/31/69	<b>(j)</b> Adjusted basis as of 12/31/69	<b>(k)</b> Excess of col. (i) over col. (j), if any	
			26,312
			372

**Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation**

<b>(a)</b> Name and address	Title, and average hours per week <b>(b)</b> devoted to position	<b>(c)</b> Compensation (If not paid, enter -0-)	<b>(d)</b> Contributions to employee benefit plans and deferred compensation	Expense account, <b>(e)</b> other allowances
BILL H BRADLEY 1101-B 23 STREET TELL CITY, IN 47586	VP SEC TR 2.00	2,000		
BETSY BRADLEY 1101-B 23 STREET TELL CITY, IN 47586	Director 1.00	2,000		
JEAN MULZER RYAN 315 7TH AVENUE N NAPLES, FL 341021553	Director 2.00	2,000		
ANGELA MULZER ERWIN 2022 NORTHSIDE DR NW ATLANTA, GA 303053938	Director 1.00	2,000		
REBECCA G MULZER 108 MT VERNON ST 3 BOSTON, MA 02108	President 1.00	2,000		
CARRIE RYAN 315 7TH AVENUE NORTH NAPLES, FL 341021553	Director 1.00	2,000		
ANDREW RYAN 315 7TH AVNUE NORTH NAPLES, FL 341021553	Director 1.00	2,000		

**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)				
<b>a</b> <i>Paid during the year</i>				
AMERICAN RED CROSS SOUTHWESTERN IND 29 S STOCKWELL ROAD EVANSVILLE, IN 47714	NONE	PC	UNRESTRICTED CHARITABLE DONATION	3,000
BIG BROTHERS BIG SISTERS - PERRY CO PO BOX 144 TELL CITY, IN 47586	NONE	PC	UNRESTRICTED CHARITABLE DONATION	3,000
BOY SCOUTS OF AMERICA - TROOP 192 PO BOX 304 TELL CITY, IN 47586	NONE	PC	UNRESTRICTED CHARITABLE DONATION	2,000
<b>Total . . . . .</b> ▶ <b>3a</b>				314,475

**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)				
<b>a</b> <i>Paid during the year</i>				
CATHOLIC CHARITIES 802 NINTH STREET TELL CITY, IN 47586	NONE	PC	UNRESTRICTED CHARITABLE DONATION	7,000
CHRISNEY LIBRARY 228 EAST NORTH STREET CHRISNEY, IN 47611	NONE	PC	UNRESTRICTED CHARITABLE DONATION	1,500
CRAWFORD CO UMC FOOD PANTRY 529 OLD ST HWY 62 LEAVENWORTH, IN 47137	NONE	PC	UNRESTRICTED CHARITABLE DONATION	7,000
<b>Total . . . . . ▶ 3a</b>				314,475

**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)				
<b>a</b> <i>Paid during the year</i>				
DEACONESS RILEY CHILDREN'S SERVICES 600 MARY STREET EVANSVILLE, IN 47710	NONE	PC	UNRESTRICTED CHARITABLE DONATION	6,000
DOLLY PARTON IMAGINATION LIBRARY PO BOX 73 TELL CITY, IN 47586	NONE	PC	UNRESTRICTED CHARITABLE DONATION	1,000
EMMANUEL LUTHERAN CHURCH CIA GROUP PO BOX 116 TELL CITY, IN 47586	NONE	PC	UNRESTRICTED CHARITABLE DONATION	1,000
<b>Total . . . . .</b>	<b>▶ 3a</b>			314,475

**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)				
<b>a</b> <i>Paid during the year</i>				
EMMANUEL LUTHERAN WOW GRP PO BOX 116 TELL CITY, IN 47586	NONE	PC	UNRESTRICTED CHARITABLE DONATION	4,000
EMMANUEL LUTHERN CHURCH WOMENS GUIL PO BOX 116 TELL CITY, IN 47586	NONE	PC	UNRESTRICTED CHARITABLE DONATION	4,000
EVANGELICAL UCC - LOCAL EMERGENCY F 802 10TH STREET TELL CITY, IN 47586	NONE	PC	UNRESTRICTED CHARITABLE DONATION	3,000
<b>Total . . . . .</b>	<b>▶ 3a</b>			314,475

**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)				
<b>a</b> <i>Paid during the year</i>				
EVANGELICAL UCC BLD GNDS FUND 802 10TH STREET TELL CITY, IN 47586	NONE	PC	UNRESTRICTED CHARITABLE DONATION	3,000
EVANSVILLE CHRISTIAN LIFE 509 S KENTUCKY AVENUE EVANSVILLE, IN 47714	NONE	PC	UNRESTRICTED CHARITABLE DONATION	3,500
EVANSVILLE RESCUE MISSION 500 E WALNUT STREET EVANSVILLE, IN 47713	NONE	PC	UNRESTRICTED CHARITABLE DONATION	2,000
<b>Total . . . . . ▶ 3a</b>				314,475

**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)				
<b>a</b> <i>Paid during the year</i>				
FRIENDS OF SOUTHERN HILLS PO BOX 769 JASPER, IN 47547	NONE	PC	UNRESTRICTED CHARITABLE DONATION	2,000
GLORY BEES PRESCHOOL 802 13TH STREET BOX 38 TELL CITY, IN 47586	NONE	PC	UNRESTRICTED CHARITABLE DONATION	3,000
HABITAT FOR HUMANITY OF SPENCER CO PO BOX 121 SANTA CLAUS, IN 47579	NONE	PC	UNRESTRICTED CHARITABLE DONATION	7,000
<b>Total . . . . .</b> ▶ <b>3a</b>				314,475

**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)				
<b>a</b> <i>Paid during the year</i>				
HABITAT FOR HUMANITY OF CRAWFORD CO PO BOX 203 MARENGO, IN 47140	NONE	PC	UNRESTRICTED CHARITABLE DONATION	7,000
HABITAT FOR HUMANITY OF PERRY CO PO BOX 72 TELL CITY, IN 47586	NONE	PC	UNRESTRICTED CHARITABLE DONATION	7,000
HACKLEMAN CEMETARY 3266 MARTIN ROAD NEWBURGH, IN 47630	NONE	PC	UNRESTRICTED CHARITABLE DONATION	5,000
<b>Total . . . . .</b> ▶ <b>3a</b>				314,475

**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)				
<b>a</b> <i>Paid during the year</i>				
HONOR FLIGHT OF SOUTHERN INDIANA PO BOX 8234 EVANSVILLE, IN 47716	NONE	PC	UNRESTRICTED CHARITABLE DONATION	3,000
HOOSIER UPLANDS HOME 500 WEST MAIN STREET MITCHELL, IN 47446	NONE	PC	UNRESTRICTED CHARITABLE DONATION	3,000
LEADERSHIP PERRY CTY INPO BOX 192 TELL CITY, IN 47586	NONE	PC	UNRESTRICTED CHARITABLE DONATION	3,000
<b>Total . . . . . ▶ 3a</b>				314,475

**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)				
<b>a</b> <i>Paid during the year</i>				
LEADERSHIP SPENCER CTY IN 1416 ST MEINRAD ROAD ST MEINRAD, IN 47577	NONE	PC	UNRESTRICTED CHARITABLE DONATION	3,000
LUTHERAN WORLD RELIEF PO BOX 17061 BALTIMORE, MD 21298	NONE	PC	UNRESTRICTED CHARITABLE DONATION	3,000
PERRY CENTRAL FAMILY OUTREACH 18677 OLD STATE ROAD 37 LEOPOLD, IN 47551	NONE	PC	UNRESTRICTED CHARITABLE DONATION	3,000
<b>Total . . . . .</b> ▶ <b>3a</b>				314,475

**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)				
<b>a</b> <i>Paid during the year</i>				
PERRY CHILDCARE1012 31ST STREET TELL CITY, IN 47586	NONE	PC	UNRESTRICTED CHARITABLE DONATION	5,000
PERRY CO MEM HOSPITAL HOME CARE SER 8885 STATE ROAD 237 TELL CITY, IN 47586	NONE	PC	UNRESTRICTED CHARITABLE DONATION	3,000
PERRY COUNTY FOOD COALITION PO BOX 73 TELL CITY, IN 47586	NONE	PC	UNRESTRICTED CHARITABLE DONATION	5,000
<b>Total . . . . . ▶ 3a</b>				314,475

**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)				
<b>a</b> <i>Paid during the year</i>				
PERRY COUNTY GIRL SCOUTS 3270 E STATE ROAD 66 CANNELTON, IN 47520	NONE	PC	UNRESTRICTED CHARITABLE DONATION	3,500
PERRY COUNTY MEMORIAL HOSPITAL FDN 8885 STATE ROAD 237 TELL CITY, IN 47586	NONE	PC	UNRESTRICTED CHARITABLE DONATION	15,000
PERRY COUNTY PUBLIC LIBRARY-TC 2328 TELL STREET TELL CITY, IN 47586	NONE	PC	UNRESTRICTED CHARITABLE DONATION	5,000
<b>Total . . . . .</b> ▶ <b>3a</b>				314,475

**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)				
<b>a</b> <i>Paid during the year</i>				
RONALD MCDONALD HOUSE CHARITIES 3540 WASHINGTON AVENUE EVANSVILLE, IN 47714	NONE	PC	UNRESTRICTED CHARITABLE DONATION	3,000
SALVATION ARMY PERRY COUNTY IN 802 NINTH STREET TELL CITY, IN 47586	NONE	PC	UNRESTRICTED CHARITABLE DONATION	4,000
SPENCER CO HOSPICE 225 MAIN STREET ROCKPORT, IN 47635	NONE	PC	UNRESTRICTED CHARITABLE DONATION	3,000
<b>Total . . . . .</b> ▶ <b>3a</b>				314,475

**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)				
<b>a</b> <i>Paid during the year</i>				
SPENER CO HUMANE SOCPO BOX 261 DALE, IN 47523	NONE	PC	UNRESTRICTED CHARITABLE DONATION	3,000
ST JOHNS LUTHERAN CHURCH DAYCARE 12308 E 1160 NORTH EVANSTON, IN 47531	NONE	PC	UNRESTRICTED CHARITABLE DONATION	6,000
STUFF THE BUSPO BOX 73 TELL CITY, IN 47586	NONE	PC	UNRESTRICTED CHARITABLE DONATION	1,000
<b>Total . . . . .</b>				314,475

**▶ 3a**

**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)				
<b>a</b> <i>Paid during the year</i>				
TELL CITY HIGH SCHOOL BAND BOOSTERS PO BOX 174 TELL CITY, IN 47586	NONE	PC	UNRESTRICTED CHARITABLE DONATION	3,000
TELL CITY HIGH SCHOOL SOCCER TEAM 900 12TH STREET TELL CITY, IN 47586	NONE	PC	UNRESTRICTED CHARITABLE DONATION	1,000
TELL CITY HISTORICAL SOCIETY 548 9TH STREET TELL CITY, IN 47586	NONE	PC	UNRESTRICTED CHARITABLE DONATION	2,000
<b>Total . . . . .</b>				314,475

**▶ 3a**

**Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment**

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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
TELL CITY REGIONAL ARTSPO BOX 815 TELL CITY, IN 47586	NONE	PC	UNRESTRICTED CHARITABLE DONATION	6,500
THE WAY OF ROCKPORTPO BOX 506 ROCKPORT, IN 47635	NONE	PC	UNRESTRICTED CHARITABLE DONATION	6,000
UNITED WAY OF PERRY COPO BOX 73 TELL CITY, IN 47586	NONE	PC	UNRESTRICTED CHARITABLE DONATION	7,000
<b>Total . . . . .</b> ▶ <b>3a</b>				314,475

**Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment**

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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
UNITED WAY OF SPENCER CO PO BOX 18 EVANSVILLE, IN 47701	NONE	PC	UNRESTRICTED CHARITABLE DONATION	7,000
UNITED WAY WEEKEND BACKPACK PROGRAM 824 JEFFERSON ST TELL CITY, IN 47586	NONE	PC	UNRESTRICTED CHARITABLE DONATION	2,000
WE THE YOUTH OF PERRY CO 20 ELEVENTH STREET TELL CITY, IN 47586	NONE	PC	UNRESTRICTED CHARITABLE DONATION	2,500
<b>Total . . . . .</b> ▶ <b>3a</b>				314,475

**Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment**

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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
WM TELL ELEM SCHOOL 1235 31ST STREET TELL CITY, IN 47586	NONE	PC	UNRESTRICTED CHARITABLE DONATION	4,000
WNIN PUBLIC RADIO 405 CARPENTER STREET EVANSVILLE, IN 47708	NONE	PC	UNRESTRICTED CHARITABLE DONATION	3,000
YMCA OF SOUTHWESTERN INDIANA 222 NW 6TH STREET EVANSVILLE, IN 47708	NONE	PC	UNRESTRICTED CHARITABLE DONATION	2,000
<b>Total . . . . .</b> ▶ <b>3a</b>				314,475

**Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment**

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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
YMCA OF EVANSVILLE IN 118 VINE STREET EVANSVILLE, IN 47708	NONE	PC	UNRESTRICTED CHARITABLE DONATION	10,000
ZION UNITED CHURCH OF CHRIST PO BOX 65 CHRISNEY, IN 47611	NONE	PC	UNRESTRICTED CHARITABLE DONATION	5,000
LINCOLN AMPITHEATRE 15032 EAST COUNTY ROAD 1500 LINCOLN CITY, IN 47552	NONE	PC	UNRESTRICTED CHARITABLE DONATION	5,000
<b>Total . . . . .</b> ▶ <b>3a</b>				314,475

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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)				
<b>a</b> <i>Paid during the year</i>				
PERRY COUNTY MEMORIAL HOSPITAL 8885 ST RT 237 TELL CITY, IN 47586	NONE	PC	UNRESTRICTED CHARITABLE DONATION	9,000
TELL CITY HIGH SCHOOL TENNIS TEAM 900 12TH STREET TELL CITY, IN 47586	NONE	PC	UNRESTRICTED CHARITABLE DONATION	1,000
LINCOLN HILLS UNITED METHODIST CHUR 1598 W ST TR 64 ENGLISH, IN 47118	NONE	PC	UNRESTRICTED CHARITABLE DONATION	3,000
<b>Total . . . . .</b> ▶ <b>3a</b>				314,475

**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)				
<b>a</b> <i>Paid during the year</i>				
BOYS AND GIRLS CLUB HARRISONCRAWFOR PO BOX 215 CORYDON, IN 47112	NONE	PC	UNRESTRICTED CHARITABLE DONATION	3,500
CLIFF HAGEN BOYS GIRLS CLUB ROCKPORT UNIT 200 SOUTH 6 STREET ROCKPORT, IN 47635	NON	PC	UNRESTRICTED CHARITABLE DONATION	3,000
SOUTHWEST IN CHILD ADVOCACY CENTER PO BOX 252 JASPER, IN 47547	NONE	PC	UNRESTRICTED CHARITABLE DONATION	3,500
<b>Total . . . . .</b>	<b>▶ 3a</b>			314,475

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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)				
<b>a</b> <i>Paid during the year</i>				
TOTS LOTS PRESCHOOLPO BOX 32 TELL CITY, IN 47586	NONE	PC	UNRESTRICTED CHARITABLE DONATION	3,000
INDIANA UNIVERSITY SOUTHEAST 200 NORTH 7 STREET TERRE HAUTE, IN 47889	NONE	PC	SCHOLARSHIP	-1,000
IVY TECH COMMUNITY COLLEGE 3501 N FIRST AVE EVANSVILLE, IN 47110	NONE	PC	SCHOLARSHIP	4,000
<b>Total . . . . . ▶ 3a</b>				314,475

**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)				
<b>a</b> <i>Paid during the year</i>				
GIRL SCOUT OF SW INDIANA 5000 EAST VIRGINIA ST STE2 EVANSVILLE, IN 47715	NONE	PF	UNRESTRICTED CHARITABLE DONATION	10,000
WIDOW'S BARREL FOOD PANTRY 821 10TH STREET TELL CITY, IN 47586	NONE	PF	UNRESTRICTED CHARITABLE DONATION	10,000
TELL CITY HIGH SCHOOL DRONE TEAM PO BOX 174 TELL CITY, IN 47586		PF	UNRESTRICTED CHARITABLE DONATION	3,000
<b>Total . . . . . ▶ 3a</b>				314,475

**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)				
<b>a</b> <i>Paid during the year</i>				
DEACONESS FOUNDATION 600 MARY STREET EVANSVILLE, IN 47747		PF	UNRESTRICTED CHARITABLE DONATION	6,475
ROME COMMUNITY CENTER 15850 E ROME ROAD ROME, IN 47574		PF	UNRESTRICTED CHARITABLE DONATION	15,000
MULTIPLE MYELOMA RESEARCH FOUNDATIO PO BOX 414238 BOSTON, MA 02241		PF	UNRESTRICTED CHARITABLE DONATION	2,500
<b>Total . . . . .</b> ▶ <b>3a</b>				314,475

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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
PJ'S COLLEGE OF COSMETOLOGY 1710 E 10TH STREET JEFFERSNVILLE, IN 47130		PF	SCHOLARSHIPS	2,000
UNIVERSITY OF SOUTHERN INDIANA 8600 UNIVERSITY BLVD EVANSVILLE, IN 47712		PF	SCHOLARSHIPS	2,000
TAYLOR UNIVERSITY 236 W READE AVE UPLAND, IN 46989		PF	SCHOLARSHIPS	2,000
<b>Total . . . . . ▶ 3a</b>				314,475

**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)				
<b>a</b> <i>Paid during the year</i>				
HANOVER COLLEGE517 BALL DRIVE HANOVER, IN 47243				
HERITAGE HILLS SCHOLARSHIP FOUNDATI 113 BLUE SPRUCE DRIVE SANTA CLAUS, IN 47579				
OWENSBORO COMMUNITY 4800 NEW HARTFORD ROAD OWENSBORO, KY 42303				
<b>Total . . . . .</b>	<b>▶ 3a</b>			314,475

**TY 2019 Accounting Fees Schedule****Name:** EDGAR AND ROBERTA MULZER FOUNDATION**EIN:** 35-2049784**Software ID:** 19009920**Software Version:** 2019v5.0

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
ACCOUNTING	3,105	3,105	0	0
BOOKKEEPING	2,000	2,000	0	0

**TY 2019 Investments Corporate Bonds Schedule****Name:** EDGAR AND ROBERTA MULZER FOUNDATION**EIN:** 35-2049784**Software ID:** 19009920**Software Version:** 2019v5.0**Investments Corporate Bonds Schedule**

<b>Name of Bond</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
ARCHER DANIESL MILDAND	25,175	31,818
JPMORGAN CHASE	40,092	41,541
MCDONALDS CORP	25,313	33,866
GENERAL ELEC CAP CORP	74,000	72,480
CITIGROUP		
NATIONS BANK CORP	58,122	61,900

**TY 2019 Investments Corporate Stock Schedule****Name:** EDGAR AND ROBERTA MULZER FOUNDATION**EIN:** 35-2049784**Software ID:** 19009920**Software Version:** 2019v5.0**Investments Corporation Stock Schedule**

<b>Name of Stock</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
ABBVIE INC	50,551	90,754
ACCENTURE LTD ORD	24,715	89,492
AIR PRODUCTS AND CHEMICALS INC		
APPLE COMPUTER INC	14,498	64,897
AT&T INC COM	105,724	120,601
CISCO SYSTEMS INC	66,409	119,900
ELBERFELD ST BK 750 SHRS	218,250	392,715
JOHNSON & JOHNSON	34,472	52,805
JP MORGAN CHASE & CO	28,405	81,828
JP MORGAN CHASE PFD		
MICROSOFT CORP COM	26,067	95,882
NEXTERA ENERGY	28,682	81,608
NIKE INC	8,798	48,629
ONB BANCORP 984.218 SHRS	12,352	20,806
ROYAL BANK CDA MONTREAL QUE	75,316	97,020
THERMWOOD CORP 78,052 SHRS	1,092,728	1,525,136
UNITED PARCEL SERVICE	53,057	64,383
ALPHABET INC CLASS C	6,308	33,425
ALPHABET INC CLASS A	6,345	33,485
AMGEN INC		
BOEING	26,576	65,152
HUNTINGTON BANK SHARES	93,956	91,000
INTERNATIONAL BUSINESS MACHINES		
LOCKHEED MARTIN	84,312	136,283
MORGAN STANLEY	70,134	71,525
PFIZER	65,370	71,503
ENBRIDGE INC COM	51,461	64,825
HOME DEPOT	75,369	98,271
HONEYWELL INTERNATIONAL INC	58,671	70,446
ILLINOIS TOOL WORKS INC		

**Investments Corporation Stock Schedule**

<b>Name of Stock</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
MARSH & MCLENNAN COS INC	69,561	100,269
MEDTRONIC PLC COM	56,673	76,579
ONEOK INC COM	47,805	68,103
PNC FINL CORP COM	72,429	88,595
STARBUCKS CORP COM		
PAYCHEX INC	67,040	87,186
PEPSICO INC.	66,220	78,585
RESIDIO TECHNOLOGIES INC.	1,907	1,038
WEC ENERGY GROUP INC	65,892	81,162
CUMMINS INC.	65,178	78,742
EXXON MOBIL CORP		
GARRETT MOTION INC.	709	519
BLACKROCK INC	73,199	79,427
BROADCOM INC	76,585	85,325
CLOROX CO	64,729	60,648
KINDER MORGAN INC	63,302	64,568
KKR & CO INC	102,155	100,377
MCDONALD'S CORP	70,069	75,092
THE HARTFORD FIN SERVICES	42,265	42,585
US BANCORP	40,202	41,430
WALGREENS BOOTS ALLIANCE	65,081	66,625

**TY 2019 Investments Government Obligations Schedule****Name:** EDGAR AND ROBERTA MULZER FOUNDATION**EIN:** 35-2049784**Software ID:** 19009920**Software Version:** 2019v5.0**US Government Securities - End  
of Year Book Value:**

636,972

**US Government Securities - End  
of Year Fair Market Value:**

649,645

**State & Local Government  
Securities - End of Year Book  
Value:****State & Local Government  
Securities - End of Year Fair  
Market Value:**

**TY 2019 Other Assets Schedule****Name:** EDGAR AND ROBERTA MULZER FOUNDATION**EIN:** 35-2049784**Software ID:** 19009920**Software Version:** 2019v5.0**Other Assets Schedule**

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
Accrued Interest		8,285	8,285

**TY 2019 Other Decreases Schedule****Name:** EDGAR AND ROBERTA MULZER FOUNDATION**EIN:** 35-2049784**Software ID:** 19009920**Software Version:** 2019v5.0

Description	Amount
BOND PREMIUM	845

**TY 2019 Other Expenses Schedule****Name:** EDGAR AND ROBERTA MULZER FOUNDATION**EIN:** 35-2049784**Software ID:** 19009920**Software Version:** 2019v5.0**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ANNUAL REPORT	104	104		
OFFICE SUPPLIES	343			343
POSTAGE	150			150

**TY 2019 Other Increases Schedule****Name:** EDGAR AND ROBERTA MULZER FOUNDATION**EIN:** 35-2049784**Software ID:** 19009920**Software Version:** 2019v5.0

<b>Description</b>	<b>Amount</b>
NON DIVIDEND DISTRIBUTIONS	4,171

**TY 2019 Other Professional Fees Schedule****Name:** EDGAR AND ROBERTA MULZER FOUNDATION**EIN:** 35-2049784**Software ID:** 19009920**Software Version:** 2019v5.0

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
MANAGEMENT FEES	25,788	25,788	0	0
MISC ADJUSTMENT	164	-164	0	0

**TY 2019 Taxes Schedule****Name:** EDGAR AND ROBERTA MULZER FOUNDATION**EIN:** 35-2049784**Software ID:** 19009920**Software Version:** 2019v5.0

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
FEDERAL TAX PAID	2,962	2,962		
FOREIGN TAX PAID	1,201	1,201		