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Form **990-PF**Department of the Treasury
Internal Revenue Service**Return of Private Foundation**
or Section 4947(a)(1) Trust Treated as Private Foundation▶ Do not enter social security numbers on this form as it may be made public.
▶ Go to www.irs.gov/Form990PF for instructions and the latest information.

OMB No 1545-0047

2019

Open to Public Inspection

For calendar year 2019 or tax year beginning

, 2019, and ending

, 20

Name of foundation

ANNA PAULINA FOUNDATION

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

3400 W BRISTOL ROAD

Room/suite

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

FLINT MI 48507-3112

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

Fair market value of all assets at
end of year (from Part II, col. (c),
line 16) ▶ \$ 21,800,369

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

A Employer identification number

38-6061335

B Telephone number (see instructions)

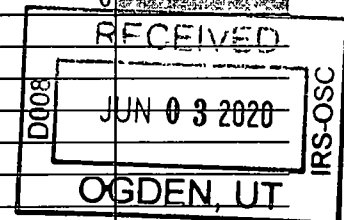
810-238-3685

C If exemption application is pending, check here ☐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 ☐**Part I Analysis of Revenue and Expenses** (The total of
amounts in columns (b), (c), and (d) may not necessarily equal
the amounts in column (a) (see instructions))(a) Revenue and
expenses per
books(b) Net investment
income(c) Adjusted net
income(d) Disbursements
for charitable
purposes
(cash basis only)

- 1 Contributions, gifts, grants, etc., received (attach schedule) 751,041
- 2 Check ☐ if the foundation is not required to attach Sch. B
- 3 Interest on savings and temporary cash investments
- 4 Dividends and interest from securities 788,112 778,696
- 5a Gross rents
- b Net rental income or (loss)
- 6a Net gain or (loss) from sale of assets not on line 10 387,000
- b Gross sales price for all assets on line 6a 5,431,837
- 7 Capital gain net income (from Part IV, line 2)
- 8 Net short-term capital gain 0
- 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 1,926,153 1,165,696 0

- 13 Compensation of officers, directors, trustees, etc.
- 14 Other employee salaries and wages
- 15 Pension plans, employee benefits
- 16a Legal fees (attach schedule)
- b Accounting fees (attach schedule)
- c Other professional fees (attach schedule) 35,671 35,671
- 17 Interest
- 18 Taxes (attach schedule) (see instructions) 13,786
- 19 Depreciation (attach schedule) and depletion
- 20 Occupancy
- 21 Travel, conferences, and meetings
- 22 Printing and publications
- 23 Other expenses (attach schedule) 278
- 24 Total operating and administrative expenses.
Add lines 13 through 23 49,735 35,671 0 0
- 25 Contributions, gifts, grants paid 1,189,150
- 26 Total expenses and disbursements. Add lines 24 and 25 1,238,885 35,671 0 1,189,150

- 27 Subtract line 26 from line 12:
- a Excess of revenue over expenses and disbursements 687,268
- b Net investment income (if negative, enter -0-) 1,130,025
- c Adjusted net income (if negative, enter -0-) 0



For Paperwork Reduction Act Notice, see instructions.

Cat No 11289X

Form **990-PF** (2019)

ENVELOPE MAY 29 2020

STAMP DATE

43 Received Revenue NOV 13 2020

SCANNED FEB 05 2021

Operating Administrative Expenses

23

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	350,813	68,952	68,952
	2 Savings and temporary cash investments	546,533	293,570	293,570
	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)	5,066,115	5,817,539	7,967,303
	c Investments—corporate bonds (attach schedule)	660,907	656,220	789,792
	11 Investments—land, buildings, and equipment: basis ▶ Less: accumulated depreciation (attach schedule) ▶			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	12,137,540	12,612,895	12,680,752
	14 Land, buildings, and equipment: basis ▶ Less: accumulated depreciation (attach schedule) ▶			
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	18,761,908	19,449,176	21,800,369	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ ☒ and complete lines 24, 25, 29, and 30.			
	24 Net assets without donor restrictions	18,761,908	19,449,176	
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here ▶ ☐ and complete lines 26 through 30.			
	26 Capital stock, trust principal, or current funds			
	27 Paid-in or capital surplus, or land, bldg., and equipment fund			
	28 Retained earnings, accumulated income, endowment, or other funds			
	29 Total net assets or fund balances (see instructions)	18,761,908	19,449,176	
30 Total liabilities and net assets/fund balances (see instructions)	18,761,908	19,449,176		

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	18,761,908
2 Enter amount from Part I, line 27a	2	687,268
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	19,449,176
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	19,449,176

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 ATTACHED SCHEDULE				
b				
c				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))	
a				
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.				
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))	
a				
b				
c				
d				
e				
2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }		2	387,000	
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	1,106,314	19,742,710	0 056037
2017	1,016,137	18,784,744	0 054094
2016	1,777,966	18,090,895	0 098280
2015	1,317,531	17,914,417	0 073546
2014	417,454	17,161,401	0 024325
2 Total of line 1, column (d)			2 0 306282
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years			3 0 061256
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5			4 20,799,469
5 Multiply line 4 by line 3			5 1,274,092
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 11,300
7 Add lines 5 and 6			7 1,285,392
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 1,189,150

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b	1	22,601
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col. (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	2	0
3	Add lines 1 and 2	3	22,601
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	4	0
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	22,601
6	Credits/Payments: \$14,000 + \$6,938 SEE AMENDED 2018 RETURN.		
a	2019 estimated tax payments and 2018 overpayment credited to 2019	6a	22,938
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	22,938
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	337
11	Enter the amount of line 10 to be Credited to 2020 estimated tax Refunded	11	337

Part VII-A Statements Regarding Activities

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

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 ► N/A	✓	
14 The books are in care of ► JOHN C KOEGEL Telephone no. ► 810-238-3685 Located at ► 3400 W BRISTOL ROAD FLINT, MICHIGAN ZIP+4 ► 48507-3112		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—check here and enter the amount of tax-exempt interest received or accrued during the year		15
16 At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?		✓

See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required**File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.**

	Yes	No
1a During the year, did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	Yes	✓ No
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	Yes	✓ No
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	Yes	✓ No
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	Yes	✓ No
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	Yes	✓ No
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	Yes	✓ No
b If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions N/A Organizations relying on a current notice regarding disaster assistance, check here		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? If "Yes," list the years ► 20 , 20 , 20 , 20	Yes	✓ No
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?	Yes	✓ No
b If "Yes," did it have excess business holdings in 2019 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019.)		3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		✓
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?		✓

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 ☒ NoOrganizations 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
SEE ATTACHED SCHEDULE				

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

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

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

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)***3 Five highest-paid independent contractors for professional services. See instructions. If none, enter "NONE."**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
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 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2

	Amount
1 N/A	
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3 ▶	

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	20,290,196
b	Average of monthly cash balances	1b	826,016
c	Fair market value of all other assets (see instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	21,116,212
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	21,116,212
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	316,743
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	20,799,469
6	Minimum investment return. Enter 5% of line 5	6	1,039,973

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	1,039,973
2a	Tax on investment income for 2019 from Part VI, line 5	2a	22,601
b	Income tax for 2019. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	22,601
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	1,017,372
4	Recoveries of amounts treated as qualifying distributions	4	0
5	Add lines 3 and 4	5	1,017,372
6	Deduction from distributable amount (see instructions)	6	0
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	1,017,372

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	1,189,150
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	1,189,150
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	1,189,150

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				1,017,372
2 Undistributed income, if any, as of the end of 2019:				
a Enter amount for 2018 only				
b Total for prior years: 20 ____, 20 ____, 20 ____				
3 Excess distributions carryover, if any, to 2019:				
a From 2014 417,454				
b From 2015 438,678				
c From 2016 890,809				
d From 2017 92,826				
e From 2018 132,874				
f Total of lines 3a through e	1,972,641			
4 Qualifying distributions for 2019 from Part XII, line 4. ► \$ 1,189,150				
a Applied to 2018, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions)				
c Treated as distributions out of corpus (Election required—see instructions)				
d Applied to 2019 distributable amount				1,017,372
e Remaining amount distributed out of corpus	171,778			
5 Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	2,144,419			
b Prior years' undistributed income. Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b. Taxable amount—see instructions				
e Undistributed income for 2018. Subtract line 4a from line 2a. Taxable amount—see instructions				
f Undistributed income for 2019. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required—see instructions)				
8 Excess distributions carryover from 2014 not applied on line 5 or line 7 (see instructions)	417,454			
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a	1,726,965			
10 Analysis of line 9:				
a Excess from 2015 438,678				
b Excess from 2016 890,809				
c Excess from 2017 92,826				
d Excess from 2018 132,874				
e Excess from 2019 171,778				

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)

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 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).)

SEE ATTACHED SCHEDULE

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

N/A

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

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

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

N/A

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

N/A

- c** Any submission deadlines:

N/A

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

N/A

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i>				
SEE ATTACHED SCHEDULE				1,189,150
Total			▶	3a 1,189,150
b <i>Approved for future payment</i>				
N/A				
Total			▶	3b

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions.)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue.					
a	_____					
b	_____					
c	_____					
d	_____					
e	_____					
f	_____					
g	Fees and contracts from government agencies					
2	Membership dues and assessments					
3	Interest on savings and temporary cash investments					
4	Dividends and interest from securities			14	788,112	
5	Net rental income or (loss) from real estate:					
a	Debt-financed property					
b	Not debt-financed property					
6	Net rental income or (loss) from personal property					
7	Other investment income					
8	Gain or (loss) from sales of assets other than inventory			14	387,000	
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue: a _____					
b	_____					
c	_____					
d	_____					
e	_____					
12	Subtotal. Add columns (b), (d), and (e)		0		1,175,112	0
13	Total. Add line 12, columns (b), (d), and (e)				13 1,175,112	1,175,112

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

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

[illegible]

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

ANNA PAULINA FOUNDATION
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PAGE 1, PART I, LINE 1 CONTRIBUTIONS

Albert J. & Barbara L. Koegel 3400 W. Bristol Road, Flint, MI 48507-3112 Cash	100,000.00
Jeffry D. & Anne Rocco 3400 W. Bristol Road, Flint, MI 48507-3112 Cash	150,000.00
Kathryn Koegel 3400 W. Bristol Road, Flint, MI 48507-3112 Cash	150,000.00
Jane Koegel 3400 W. Bristol Road, Flint, MI 48507-3112 Cash	150,000.00
John C. & Lisa Koegel 3400 W. Bristol Road, Flint, MI 48507-3112 Publicly Traded Securities	
80 shares Amazon Com., Inc.	88,460.50
1,625 Candence Design Sys., Inc.	<u>112,222.50</u>
	200,683.00
Cash (Koegel Meats, Inc. employees)	<u>358.00</u>
Total	<u><u>751,041.00</u></u>

ANNA PAULINA FOUNDATION
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PAGE 1, PART I

LINE 16c Other Professional Fees
Investment Fees

35,671.00

LINE 18 Taxes (Paid in 2019)
2019 Tax (estimated payments)
Tax Refund
Total

16,000.00

(2,214.00)

13,786.00

LINE 23 Other Expenses
Office Expense - check reorder fee

278.00

ANNA PAULINA FOUNDATION

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PAGE 2, PART II BALANCE SHEET

	Beginning of Year Book Value	End of Year Book Value	Basis of Valuation	Fair Market Value
LINE				
10b Investments - Corporate Stock	5,066,115.00	5,817,539.00	COST	7,967,303.00
10C Investments - Corporate Bonds	660,907.00	656,220.00	COST	789,792.00
13 Investments - Other				
Exchange-Traded & Closed-End Funds	1,425,242.00	1,542,689.00	COST	1,456,790.00
Mutual Funds Open-End funds	3,441,923.00	3,591,754.00	COST	3,395,970.00
Municipal Bonds	878,730.00	878,549.00	COST	932,784.00
Preferred Stock	<u>6,391,645.00</u>	<u>6,599,903.00</u>	COST	<u>6,895,208.00</u>
	12,137,540.00	12,612,895.00		12,680,752.00

ANNA PAULINA FOUNDATION
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PAGE 3, PART IV

SCHEDULE OF CAPITAL GAINS (LOSSES)

Quantity	Security Description	Purchase Date	Date Sold	Sale Amount	Cost	Gain (Loss)
4,400	Ventas Realty LP	2-28-13	1-3-19	110,000 00	110,000 00	0 00
6,000	JP Morgan Chase & Co CLD	1-23-14	3-1-19	150,000 00	150,000 00	0.00
1,788	Kinco Realty Corp	3-9-12	9-16-19	44,700 00	44,320 05	379 95
4,000	JP Morgan Chase & Co CLD	1-29-13	12-2-19	100,000 00	100,000 00	0 00
4,000	Stanley Black & Decker CLD	7-18-12	12-13-19	100,000 00	100,000 00	0 00
	675 Intuitive Surgical, Inc	6-15-16	1-29-19	331,700 68	145,226 23	186,474 45
2,800	Jacobs ENGN Group, Inc	11-6-18	2-5-19	185,966 58	220,388 84	(34,422 26)
1,215	Take Two Inter Software	9-20-17	2-6-19	116,097 82	124,819 87	(8,722 05)
2,450	Centene Corp	8-20-18	3-12-19	142,326 49	174,950 81	(32,624 32)
2,145	MellanoX Technologies	12-12-18	4-17-19	256,872 59	199,667 50	57,205 09
	800 Anthem, Inc	11-6-18	4-12-19	208,876 56	217,007 92	(8,131 36)
6,205	Ternium S A	8-25-16	4-12-19	169,360 84	130,363 75	38,997 09
1,015	Alibaba Group Holdings LT	4-12-19	5-29-19	153,872 33	190,334 02	(36,461 69)
	575 Boeing Company	12-4-17	5-8-19	204,302 30	161,345 00	42,957 30
	888 Clorox Co Del Com	3-12-19	5-20-19	130,615 00	142,177 50	(11,562 50)
	895 Arista Networks, Inc	4-25-17	6-17-19	213,200 25	124,796 20	88,404 05
1,919	CSX Corp	9-12-18	7-22-19	136,251 55	142,140 33	(5,888 78)
	65 Align Tech, Inc DEL Com	9-11-17	7-31-19	13,665 06	11,902 15	1,762 91
	585 Align Tech, Inc DEL Com	9-14-17	7-31-19	124,483 72	107,119 35	17,364 37
5,516	Keurig Dr Pepper, Inc	12-12-18	8-14-19	154,893 80	145,348.81	9,544 99
1,905	Keurig Dr Pepper, Inc	12-12-18	8-14-19	53,493.96	49,886 04	3,607 92
2,000	Paypal Holdings, Inc. shs	10-11-17	8-7-19	211,118 03	134,616 80	76,501 23
	700 Paypal Holdings, Inc shs	12-12-17	8-7-19	73,891.31	51,653 07	22,238 24
2,215	Xilinx, Inc	12-12-18	8-7-19	232,823 80	200,036 43	32,787 37
1,145	Cyber-Ark Software LTD	5-29-19	8-10-19	118,902 24	153,957.73	(35,055 49)
1,322	WorkDay, Inc CL A	4-17-19	9-10-19	228,239 24	256,817 14	(28,577 90)
3,000	Progressive CRP Ohio	6-12-18	10-21-19	209,176 97	188,429 70	20,747 27
4,615	Ciena Corp	2-5-19	11-4-19	168,658 61	174,952 80	(6,294 19)
4,205	Cisco Systems, Inc Com	12-12-18	11-19-19	189,989 74	199,892 66	(9,902.92)
5,180	Pageseguro Digital LTD	8-7-19	11-5-19	180,962 98	230,316 02	(49,353 04)
2,000	Royal Gold, Inc Com	2-5-19	11-4-19	220,744 63	173,538 80	47,205 83
1,154	SBA Communications Corp	8-7-19	11-5-19	268,885 66	284,802 01	(15,916.35)
2,000	Aegon N V PERP 6 5% Cap Cumulative	11-18-05	6-17-19	50,000 00	50,000.00	0.00
1,600 000	ING Groep N V PERP HYB 6 375%	8-15-13	6-17-19	40,000 00	37,320 66	2,679 34
21 898	Allianzgi NFJ International Value Fd CL A	Various	12-10-19	405 62	504 63	(99 01)
161 018	Allianzgi NFJ International Value Fd CL A	Various	12-10-19	2,982 62	3,710 58	(727 96)
14 703	Allianzgi NFJ International Value Fd CL A	Various	12-10-19	272 36	338 82	(66 46)
202.184	Allianzgi NFJ International Value Fd CL A	6-27-08	12-10-19	3,745 16	4,659 23	(914 07)
193 498	Allianzgi NFJ International Value Fd CL A	6-18-08	12-10-19	3,584 26	4,459 06	(874 80)
251 481	Allianzgi NFJ International Value Fd CL A	3-6-08	12-10-19	4,658 31	5,795.25	(1,136 94)
44 382	Allianzgi NFJ International Value Fd CL A	9-23-09	12-10-19	822 11	1,022 76	(200 65)
25.620	Allianzgi NFJ International Value Fd CL A	12-11-08	12-10-19	474 57	590 40	(115 83)
0.844	Allianzgi NFJ International Value Fd CL A	12-11-08	12-10-19	15 63	19 45	(3 82)
1 865	American Century Emerging Markets Fd Cl	3-20-19	12-10-19	20 34	17 16	3.18
13 432	American Century Emerging Markets Fd Cl	Various	12-10-19	146 46	123 62	22 84
314 225	American Century Emerging Markets Fd Cl	3-6-08	12-10-19	3,426.31	2,891.86	534 45
5 748	American Century Emerging Markets Fd Cl	3-11-08	12-10-19	62 68	52 90	9 78
1 777	American Century Emerging Markets Fd Cl	3-11-08	12-10-19	19 38	16 35	3 03

Quantity	Security Description	Purchase Date	Date Sold	Sale Amount	Cost	Gain (Loss)
260 688	American Century Emerging Markets Fd Cl	6-18-08	12-10-19	2,842 55	2,399 15	443 40
270.856	American Century Emerging Markets Fd Cl	6-27-08	12-10-19	2,953 41	2,492 73	460 68
125 494	American Century Emerging Markets Fd Cl	9-23-09	12-10-19	1,368 39	1,154 94	213 45
19 168	Victory Sophus Emerging Markets Fd Cl A	Various	12-10-19	383 87	331 83	52 04
117 346	Victory Sophus Emerging Markets Fd Cl A	Various	12-10-19	2,350 05	2,192 39	157 66
0 698	Victory Sophus Emerging Markets Fd Cl A	12-14-12	12-10-19	13.98	16 39	(2 41)
104 735	Victory Sophus Emerging Markets Fd Cl A	3-6-08	12-10-19	2,097 49	2,655 46	(557 97)
98 775	Victory Sophus Emerging Markets Fd Cl A	6-18-08	12-10-19	1,978 14	2,497 43	(519 29)
103 093	Victory Sophus Emerging Markets Fd Cl A	6-27-08	12-10-19	2,064 61	2,497 32	(432 71)
3.248	Victory Sophus Emerging Markets Fd Cl A	12-19-08	12-10-19	65 05	38 96	26 09
	Capital Gain Distributions			100,895 18		100,895 18
	Capital Loss (stocks cost adjustment per brokerage statement)				9 82	(9 82)
	Capital Loss (mutal funds cost adjustment per brokerage statements)			0 00	62,371 48	(62,371 48)
	Capital Loss (corporate bonds, preferred stock cost adjustment per brokerage statements)			0 00	4,719 03	(4,719 03)
	Capital Loss (municipal bonds cost adjustment per brokerage stmmts)			115 83	297 63	(181 80)
	Capital Loss (exchange-traded & closed end funds cost adjustment per brokerage statements)				8,831 93	(8,831 93)
TOTAL				5,431,837.10	5,044,836 75	387,000.35
				=====	=====	=====
						387,000 35
						=====

ANNA PAULINA FOUNDATION
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PAGE 6, PART VIII, LINE 1 LIST OF OFFICERS, DIRECTORS, TRUSTEES, Etc.

NAME & ADDRESS	TITLE	AVERAGE HOURS PER WEEK	COMPENSATION	BENEFITS	EXPENSES
JOHN C. KOEGEL 3400 W. BRISTOL ROAD FLINT, MI 48507-3112	PRESIDENT	1	0	0	0
BARBARA L. KOEGEL 3400 W. BRISTOL ROAD FLINT, MI 48507-3112	VICE PRESIDENT	0	0	0	0
JEFFRY D. ROCCO 3400 W. BRISTOL ROAD FLINT, MI 48507-3112	SECRETARY/ TREASURER	1	0	0	0
KATHRYN KOEGEL 3400 W BRISTOL ROAD FLINT, MI 48507-3112	TRUSTEE	0	0	0	0
ANNE ROCCO 3400 W. BRISTOL ROAD FLINT, MI 48507-3112	TRUSTEE	0	0	0	0
ALBERT J. KOEGEL 3400 W. BRISTOL ROAD FLINT, MI 48507-3112	TRUSTEE	0	0	0	0
LISA A. KOEGEL 3400 W. BRISTOL ROAD FLINT, MI 48507-3112	TRUSTEE	0	0	0	0
JANE KOEGEL 3400 W. BRISTOL ROAD FLINT, MI 48507-3112	TRUSTEE	0	0	0	0
KATLYN E. KOEGEL 3400 W. BRISTOL ROAD FLINT, MI 48507-3112	TRUSTEE	0	0	0	0
MARK E. NEITHERCUT 3400 W. BRISTOL ROAD FLINT, MI 48507-3112	TRUSTEE	0	0	0	0

ANNA PAULINA FOUNDATION

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2019 FORM 990-PF SUPPORTING SCHEDULE

PAGE 10, PART XV, LINE 1a MANAGERS WHO CONTRIBUTED OVER 2% OR \$5,000.00

NAME	AMOUNT
ALBERT J. KOEGEL	50,000.00
BARBARA L. KOEGEL	50,000.00
JEFFRY D. ROCCO	75,000.00
ANNE ROCCO	75,000.00
KATHRYN KOEGEL	150,000.00
JANE KOEGEL	150,000.00
JOHN C. KOEGEL	100,341.50
LISA KOEGEL	100,341.50
	<u>650,683.00</u>

ANNA PAULINA FOUNDATION
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2019 FORM 990-PF SUPPORTING SCHEDULE

PAGE 11, PART XV SUPPLEMENTARY INFORMATION
CONTRIBUTIONS PAID DURING THE YEAR

ALL CONTRIBUTIONS LISTED BELOW ARE FOR EITHER CHARITABLE, EDUCATIONAL, OR RELIGIOUS PURPOSES

NAME OF RECIPIENT	ADDRESS	IF RECIPIENT IS AN INDIVIDUAL	FOUNDATION STATUS	AMOUNT
Alzheimer's Disease Research	P O Box 1950 Clarksburg, MD 20871-1950	N/A	Public Charity	500 00
American Forests	P O Box 96631, Washington, DC 20090-6631	N/A	Public Charity	1,000 00
American Lung Association In Michigan	1475 E 12 Mile Rd , Madison Heights, MI 48071	N/A	Public Charity	500 00
American Red Cross	1401 S Grand Traverse, Flint, MI 48503	N/A	Public Charity	20,000 00
American Symphony Orchestra League	33 W 60th St, 5th Floor, New York, NY 10023-7905	N/A	Public Charity	100 00
Americans for Prosperity	P O Box 9377, Pueblo, CO 81008-9982	N/A	Public Charity	1,000 00
Arthritis Foundation MI Chapter	888 W Big Beaver Rd, Ste 305, Troy, MI 48084	N/A	Public Charity	500 00
BBB Wise Giving Alliance	P O Box 1808, Merrifield, VA 22116-8008	N/A	Public Charity	100 00
Berea College	101 Chestnut St , Berea, KY 40403	N/A	Public Charity	500 00
Boys and Girls Club	3701 N Avenll Ave , Flint, MI 48506	N/A	Public Charity	1,000 00
Boy Scouts of America	4205 E Court St , Burton, MI 48509	N/A	Public Charity	20,000 00
Boys Town	P O Box 5000, Boys Town, NE 68010-9989	N/A	Public Charity	250 00
Carman Ainsworth	G3475 W Court St , Flint, MI 48532	N/A	Public Charity	2,000 00
Carrage Town Ministres	605 Garland St, Flint, MI 48503	N/A	Public Charity	50,600 00
Catholic Charities	735 E Stewart Ave , Flint, MI 48501	N/A	Public Charity	500 00
C-Fact	P O Box 430, Abington, MD 21009-0430	N/A	Public Charity	900 00
Citizens Against Government Waste	P O Box 96564, Washington, DC 20077-7200	N/A	Public Charity	100 00
Community Foundation of Greater Flint	500 S Saginaw St, Flint, MI 48502	N/A	Public Charity	5,000 00
Crim Fitness Foundation	452 S Saginaw St , Suite 1, Flint, MI 48502	N/A	Public Charity	80,000 00
Crime Stoppers of Michigan	210 E Fifth St , Flint, MI 48502	N/A	Public Charity	1,000 00
Crossover Downtown Outreach Ministry	414 W Court St, Flint, MI 48503	N/A	Public Charity	4,500 00
Doctors Without Borders	P O Box 5022, Hagerstown, MD 21741-5022	N/A	Public Charity	2,000 00
Easter Seals	P O Box 798, Flint, MI 48501-0798	N/A	Public Charity	100 00
Engender Health	505 9th Street NW, Suite 601, Washington DC 20004	N/A	Public Charity	500 00
English First	8001 Forbes Place, Suite 102, Springfield, VA 22151	N/A	Public Charity	100 00
First Presbytenan Church of Flint	746 South Saginaw Street, Flint, MI 48502	N/A	Public Charity	50,000 00
Flint Regional Science Fair	P O Box 687 Flint, MI 48501	N/A	Public Charity	1,000 00
Flint Children's Museum	1602 W University Ave , Flint, MI 48504	N/A	Public Charity	5,000 00
Flint Downtown Development Authority	502 Church St , Flint, MI 48502	N/A	Public Charity	10,000 00
Flint Institute of Arts	1120 E Kearsley St , Flint, MI 48503	N/A	Public Charity	500,000 00
Flint Institute of Music	1025 East Kearsley St, Flint, MI 48503	N/A	Public Charity	150,000 00
Flint Public Library	1026 East Kearsley St, Flint, MI 48503	N/A	Public Charity	100,000 00
Flint River Watershed Coalition	1300 Bluff St , Suite 114, Flint, MI 48504	N/A	Public Charity	1,000 00
Forgotten Man Ministries	3940 Fruit Ridge Ave , NW, Grand Rapids, MI 49544	N/A	Public Charity	5,000 00
Foundation for MCC	1401 E Court St , Flint, MI 48503-2089	N/A	Public Charity	1,000 00
Free Medical Clinic of Genesee County	2437 Welch Blvd , Flint, MI 48504-6400	N/A	Public Charity	5,000 00
Friends of For-Mar Foundation	2142 N Genesee Rd, Burton, MI 48509	N/A	Public Charity	500 00
Gerholz Center For Christian Counseling	746 South Saginaw Street, Flint, MI 48502	N/A	Public Charity	50,000 00
Girl Scouts of Southeastern Michigan	42800 Garfield, Clinton Township, MI 48038	N/A	Public Charity	1,000 00
Goodwill Industries of Mid-Michigan	501 S Averill St , Flint, MI 48506	N/A	Public Charity	500 00
Greater Flint Arts Council	816 S Saginaw St , Flint, MI 48502-1730	N/A	Public Charity	500 00
Greenpeace	P O Box 90136, Fredericksburg, VA 22404-9952	N/A	Public Charity	250 00
Genesee Valley Men's Chrstian (GVMC)	1032 Stonegate Court, Flint, MI 48532	N/A	Public Charity	350 00
Habitat for Humanity	101 Burton St , Flint, MI 48503	N/A	Public Charity	500 00
Heifer International	P O Box 6021, Alberta Lea, MN 56007-9831	N/A	Public Charity	1,000 00
Higgins Lake Foundation	709 Lake St Roscommon, MI 48653-7665	N/A	Public Charity	1,000 00
Humane Society of Genesee Co	P O Box 190138, Burton, MI 48519-0138	N/A	Public Charity	500 00
Institute for Justice	901 N Glebe Rd , Ste 900, Arlington, VA 22203	N/A	Public Charity	500 00
Mackinac Center	140 W Main St, P O Box 568, Midland, MI 48640	N/A	Public Charity	10,000 00
Mercy Ships	P O Box 1930, Grand Valley, TX 75771	N/A	Public Charity	100 00
Michigan Audubon Society	2310 Science Parkway, Ste 200, Okemos, MI 48864	N/A	Public Charity	250 00
Michigan Nature Association	2310 Science Parkway, Ste 100, Okemos, MI 48864	N/A	Public Charity	2,000 00
Muscular Dystrophy Association	P O Box 97075, Washington, DC 20090-7075	N/A	Public Charity	100 00
National Audubon Society	225 Varick St , New York, NY 10014	N/A	Public Charity	250 00
The Nature Conservancy - Michigan	101 East Grand River, Lansing, MI 48906-4348	N/A	Public Charity	1,000 00
Negative Population Growth	2861 Duke St, Suite 36, Alexandna, VA 22314	N/A	Public Charity	1,000 00
North End Soup Kitchen	735 E Stewart Ave Flint, MI 48505	N/A	Public Charity	800 00
Old Newsboys of Flint	6255 Taylor Drive, Flint, MI 48507	N/A	Public Charity	1,000 00
Operation Smile	P O Box 517, Hagerstown, MD 21741-9716	N/A	Public Charity	250 00
Parents Television Council	P O Box 1855, Merrifield, VA 22116-9624	N/A	Public Charity	500 00
Planned Parenthood of Mid & S Michigan	PO Box 3673 Ann Arbor, MI 48106	N/A	Public Charity	1,000 00
Population Connection (Zero Population Gwth)	P O Box 97129 Washington, DC 20077-7052	N/A	Public Charity	1,000 00
ProEnglish	P O Box 97005, Washington, DC 20090-7005	N/A	Public Charity	100 00
Rafiki Foundation	P O Box 1988, Eustis, FL 32727-1988	N/A	Public Charity	1,000 00
Religious Freedom Coalition	P O Box 96603, Washington, DC 20090-6603	N/A	Public Charity	350 00
Salvation Army	211 W Kearsley St, Flint, MI 48502	N/A	Public Charity	10,000 00
Shnners Hospitals for Children	P O Box 1510, Ranson, WV 25438-4510	N/A	Public Charity	1,500 00

NAME OF RECIPIENT	ADDRESS	IF RECIPIENT IS AN INDIVIDUAL	FOUNDATION STATUS	AMOUNT
Sierra Club - Michigan	109 E Grand River Avenue, Lansing, MI 48906	N/A	Public Charity	500 00
Special Olympics Area XIII	2413 W Maple Ave , Flint, MI 48507	N/A	Public Charity	500 00
St Paul Lutheran School	402 S Ballenger, Flint, MI 48532	N/A	Public Charity	1,000 00
St Jude Children's Research Hospital	501 St Jude Place Memphis, TN 38105	N/A	Public Charity	500 00
Starr Commonwealth	13725 26 Mile Rd, Albion, MI 49224	N/A	Public Charity	1,000 00
Stop Predatory Gambling Foundation	100 Maryland Ave NE, Washington, DC 20002	N/A	Public Charity	500 00
Tapology, Inc	PO Box 5040, Flint, MI 48505	N/A	Public Charity	20,000 00
Trout Unlimited Michigan Aquifer Club	2114 Seventh St, Bay City, MI 48708	N/A	Public Charity	250 00
United Way	PO Box 949 Flint, MI 48501	N/A	Public Charity	10,000 00
U S English Foundation	5335 Wisconsin Ave NW Washington, DC 20015	N/A	Public Charity	100 00
U S O World Headquarters	P O Box 96860, Washington, DC 20077-7677	N/A	Public Charity	500 00
U S Olympic Committee	P O Box 7010 Albert Lea, MN 56007-8010	N/A	Public Charity	250 00
Whaley Children's Center	1201 N Grand Traverse, Flint, MI 48503	N/A	Public Charity	1,000 00
Whaley Historical House Museum	624 E Kearsley St , Flint, MI 48503	N/A	Public Charity	500 00
Whiting, The	1241 E Kearsley St , Flint, MI 48503	N/A	Public Charity	1,000 00
WKAR @ MSU	283 Communication Arts Bldg , E Lansing, MI 48824	N/A	Public Charity	500 00
World Wildlife Fund	P O Box 96555, Washington DC 20077-7789	N/A	Public Charity	500 00
YMCA of Flint	411 E Third St, Flint, MI 48503	N/A	Public Charity	1,000 00
Young Life of Genesee County	10801 S Saginaw St, Grand Blanc, MI 48439	N/A	Public Charity	25,000 00
YWCA	801 S Saginaw St Flint, MI 48502	N/A	Public Charity	15,000 00
			TOTAL	1,189,150 00 =====

Schedule B(Form 990, 990-EZ,
or 990-PF).Department of the Treasury
Internal Revenue Service**Schedule of Contributors**▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.
▶ Go to www.irs.gov/Form990 for the latest information.

OMB No 1545-0047

2019

Name of the organization

ANNA PAULINA FOUNDATION

Employer identification number

38-6061335

Organization type (check one):**Filers of:****Section:**

Form 990 or 990-EZ

☐ 501(c)() (enter number) organization☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation☐ 501(c)(3) taxable private foundationCheck if your organization is covered by the **General Rule** or a **Special Rule**.**Note:** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.**General Rule**

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000; or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year ▶ \$

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization ANNA PAULINA FOUNDATION	Employer identification number 38-6061335
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Part I **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	ALBERT J & BARBARA L. KOEGEL 3400 W BRISTOL ROAD FLINT, MI 48507-3112	\$ 100,000	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
2	JEFFRY D & ANNE ROCCO 3400 W BRISTOL ROAD FLINT, MI 48507-3112	\$ 150,000	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
3	KATHRYN KOEGEL 3400 W BRISTOL ROAD FLINT, MI 48507-3112	\$ 150,000	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
4	JANE KOEGEL 3400 W BRISTOL ROAD FLINT, MI 48507-3112	\$ 150,000	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
5	JOHN C. & LISA A. KOEGEL 3400 W. BRISTOL ROAD FLINT, MI 48507-3112	\$ 200,683	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

Name of organization ANNA PAULINA FOUNDATION	Employer identification number 38-6061335
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Part III **Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor.** Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of **\$1,000 or less** for the year. (Enter this information once. See instructions.) ► \$ _____

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-----	-----	-----	-----
	-----	-----	-----
	-----	-----	-----
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
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	-----		-----
	-----		-----
-----	-----	-----	-----
	-----	-----	-----
	-----	-----	-----
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	-----		-----
	-----		-----
	-----		-----
-----	-----	-----	-----
	-----	-----	-----
	-----	-----	-----
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	-----		-----
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	-----		-----
-----	-----	-----	-----
	-----	-----	-----
	-----	-----	-----
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	-----		-----
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	-----		-----