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Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶ Do not enter social security numbers on this form as it may be made public.

▶ Go to www.irs.gov/Form990PF for instructions and the latest information.

1912

OMB No 1545-0047

2019

Open to Public Inspection

For calendar year 2019 or tax year beginning , and ending

Name of foundation

CUNA MUTUAL GROUP FOUNDATION, INC.

A Employer identification number: 39-6105418

Number and street (or P O box number if mail is not delivered to street address): 5910 MINERAL POINT ROAD

Room/suite

B Telephone number: (608) 665-7445

City or town, state or province, country, and ZIP or foreign postal code: MADISON, WI 53705

C If exemption application is pending, check here ▶ ☐

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

D 1. Foreign organizations, check here ▶ ☐

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

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

04

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

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶$ 15,133,431.

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

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

SCANNED APR 3 0 2021

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).)

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received	12,431.		N/A	
	2 Check ▶ [X] if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	1,073.	1,073.		STATEMENT 1
	4 Dividends and interest from securities	511,756.	511,756.		STATEMENT 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	659,376.			
	b Gross sales price for all assets on line 6a: 12,359,661.				
	7 Capital gain net income (from Part IV, line 2)		659,376.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss)				
	11 Other income				
	12 **Total.** Add lines 1 through 11	1,184,636.	1,172,205.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0.	0.		0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees				
	c Other professional fees				
	17 Interest				
	18 Taxes STMT 3	1,475.	0.		0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses STMT 4	148.	0.		148.
	24 **Total operating and administrative expenses.** Add lines 13 through 23	1,623.	0.		148.
	25 Contributions, gifts, grants paid	3,802,768.			3,804,768.
	26 **Total expenses and disbursements.** Add lines 24 and 25	3,804,391.	0.		3,804,916.
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	<2,619,755.>			
	b **Net investment income** (if negative, enter -0-)		1,172,205.		
	c **Adjusted net income** (if negative, enter -0-)			N/A	

Internal Revenue Service
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923501 12-17-19 LHA For Paperwork Reduction Act Notice, see instructions.

Form **990-PF** (2019)

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Part II **Balance Sheets** Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year (a) Book Value	End of year (b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	1,698,724.	16,425.	16,425.
	2 Savings and temporary cash investments		89,377.	89,377.
	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			
	7 Other notes and loans receivable ▶			
	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 STMT 5	1,064,211.	1,280,671.	1,359,070.
	b Investments - corporate stock STMT 6	8,932,017.	5,846,062.	7,046,484.
	c Investments - corporate bonds STMT 7	4,427,114.	6,269,776.	6,622,075.
	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other			
	14 Land, buildings, and equipment: basis ▶			
	Less accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 **Total assets** (to be completed by all filers - see the instructions. Also, see page 1, item I)	16,122,066.	13,502,311.	15,133,431.
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			
	22 Other liabilities (describe ▶)			
	23 **Total liabilities** (add lines 17 through 22)	0.	0.	
Net Assets or Fund Balances	**Foundations that follow FASB ASC 958, check here ▶ ☐ and complete lines 24, 25, 29, and 30.**			
	24 Net assets without donor restrictions			
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here ▶ [X] and complete lines 26 through 30.			
	26 Capital stock, trust principal, or current funds	16,122,066.	13,502,311.	
	27 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	28 Retained earnings, accumulated income, endowment, or other funds	0.	0.	
	29 **Total net assets or fund balances**	16,122,066.	13,502,311.	
	30 **Total liabilities and net assets/fund balances**	16,122,066.	13,502,311.	

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	16,122,066.
2 Enter amount from Part I, line 27a	2	<2,619,755.>
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	13,502,311.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29	6	13,502,311.

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	PUBLICLY TRADED SECURITIES	P		
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	12,359,661.		11,700,285.	659,376.
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				659,376.
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	659,376.
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). If (loss), enter -0- in Part I, line 8	3	N/A

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	4,879,191.	14,238,757.	.342670
2017	1,726,805.	1,130,313.	1.527723
2016	1,566,657.	610,428.	2.566489
2015	1,495,243.	598,834.	2.496924
2014	1,541,936.	419,217.	3.678133

2	**Total** of line 1, column (d)	2	10.611939
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	2.122388
4	Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	16,087,639.
5	Multiply line 4 by line 3	5	34,144,212.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	11,722.
7	Add lines 5 and 6	7	34,155,934.
8	Enter qualifying distributions from Part XII, line 4	8	3,804,916.

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter: ______ (attach copy of letter if necessary-see 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	23,444.
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	23,444.
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	23,444.
6	Credits/Payments:			
a	2019 estimated tax payments and 2018 overpayment credited to 2019	6a 1,070.		
b	Exempt foreign organizations - tax withheld at source	6b 0.		
c	Tax paid with application for extension of time to file (Form 8868)	6c 23,000.		
d	Backup withholding erroneously withheld	6d 0.		
7	Total credits and payments. Add lines 6a through 6d		7	24,070.
8	Enter any **penalty** for underpayment of estimated tax. Check here [X] if Form 2220 is attached		8	0.
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶		9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶		10	626.
11	Enter the amount of line 10 to be: **Credited to 2020 estimated tax** ▶ 626. **Refunded** ▶		11	0.

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition	1b		X
	If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation. ▶ $ 0. **(2)** On foundation managers. ▶ $ 0.			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ 0.			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.	2		X
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on **Form 990-T** for this year? N/A	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by *General Instruction T*	5		X
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X	
7	Did the foundation have at least $5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	7	X	
8a	Enter the states to which the foundation reports or with which it is registered. See instructions. ▶ WI, IA			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G*? If "No," attach explanation SEE STATEMENT 8	8b		X
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2019 or the tax year beginning in 2019? See the instructions for Part XIV. If "Yes," complete Part XIV	9		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

2

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	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ N/A

14 The books are in care of ▶ ALEXZANDRA SHADE Telephone no. ▶ 608-665-7445
Located at ▶ 5910 MINERAL POINT ROAD, MADISON, WI ZIP+4 ▶ 53705

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 N/A

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

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

			Yes	No
1a	During the year, did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☒ Yes ☐ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b		X
	Organizations relying on a current notice regarding disaster assistance, check here ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2019?	1c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):			
a	At the end of tax year 2019, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2019? ☐ Yes ☒ No			
	If "Yes," list the years ▶ ____, ____, ____, ____			
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.) N/A	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. ▶ ____, ____, ____, ____			
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.) N/A	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2019?	4b		X

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

			Yes	No
5a During the year, did the foundation pay or incur any amount to:				
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes ☒ No			
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	☐ Yes ☒ No			
(3) Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes ☒ No			
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	☐ Yes ☒ No			
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes ☒ No			
b If any answer is "Yes" to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions	N/A	5b		
Organizations relying on a current notice regarding disaster assistance, check here	▶ ☐			
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? N/A	☐ Yes ☐ No			
If "Yes," attach the statement required by Regulations section 53.4945-5(d).				
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes ☒ No			
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		6b		X
If "Yes" to 6b, file Form 8870.				
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes ☒ No			
b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	N/A	7b		
8 Is the foundation subject to the section 4960 tax on payment(s) of more than $1,000,000 in remuneration or excess parachute payment(s) during the year?	☐ Yes ☒ No			

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

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

(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 STATEMENT 9		0.	0.	0.

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

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

Total number of other employees paid over $50,000 ▶ 0

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

3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over $50,000 for professional services ▶ 0

Part IX-A **Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 N/A	
2	
3	
4	

Part IX-B **Summary of Program-Related Investments**

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 ▶	0.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	15,892,122.
b	Average of monthly cash balances	1b	440,506.
c	Fair market value of all other assets	1c	
d	**Total** (add lines 1a, b, and c)	1d	16,332,628.
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	16,332,628.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	244,989.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	16,087,639.
6	**Minimum investment return.** Enter 5% of line 5	6	804,382.

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	804,382.
2a	Tax on investment income for 2019 from Part VI, line 5 — 2a: 23,444.		
b	Income tax for 2019. (This does not include the tax from Part VI.) — 2b:		
c	Add lines 2a and 2b	2c	23,444.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	780,938.
4	Recoveries of amounts treated as qualifying distributions	4	2,000.
5	Add lines 3 and 4	5	782,938.
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	782,938.

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	3,804,916.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	4	3,804,916.
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	5	0.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	3,804,916.

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				782,938.
2 Undistributed income, if any, as of the end of 2019				
a Enter amount for 2018 only			0.	
b Total for prior years: ______ , ______ , ______		0.		
3 Excess distributions carryover, if any, to 2019:				
a From 2014 1,520,995.				
b From 2015 1,464,831.				
c From 2016 1,534,917.				
d From 2017 1,670,344.				
e From 2018 4,168,024.				
f **Total** of lines 3a through e	10,359,111.			
4 Qualifying distributions for 2019 from Part XII, line 4: ▶ $ 3,804,916.				
a Applied to 2018, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2019 distributable amount				782,938.
e Remaining amount distributed out of corpus	3,021,978.			
5 Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	13,381,089.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2018. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2019. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2014 not applied on line 5 or line 7	1,520,995.			
9 **Excess distributions carryover to 2020.** Subtract lines 7 and 8 from line 6a	11,860,094.			
10 Analysis of line 9:				
a Excess from 2015 1,464,831.				
b Excess from 2016 1,534,917.				
c Excess from 2017 1,670,344.				
d Excess from 2018 4,168,024.				
e Excess from 2019 3,021,978.				

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

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

b Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			
	(a) 2019	(b) 2018	(c) 2017	(d) 2016	(e) Total
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4, for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon: a "Assets" alternative test - enter: (1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6, for each year listed					
c "Support" alternative test - enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the foundation had $5,000 or more in assets at any time during the year-see instructions.)

1 **Information Regarding Foundation Managers:**

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than $5,000). (See section 507(d)(2).)

NONE

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

NONE

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

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

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

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

c Any submission deadlines:

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

Part XV Supplementary Information *(continued)*

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
SEE ATTACHMENT		PC	CHARITABLE	3,804,768.
Total			▶ 3a	3,804,768.
b *Approved for future payment*				
SEE ATTACHMENT		PC	CHARITABLE	2,600,000.
Total			▶ 3b	2,600,000.

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income
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			14	172.	
4 Dividends and interest from securities			14	512,657.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	659,376.	
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.		1,172,205.	0.

13 **Total.** Add line 12, columns (b), (d), and (e) 13 1,172,205.

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

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

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

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

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

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

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

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

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

Sign Here

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

Carmi Douglas 11/16/2020 SVP ACCTG & TAX

Signature of officer or trustee | Date | Title

May the IRS discuss this return with the preparer shown below? See instr ☒ Yes ☐ No

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
SARAH REDDEN	Sarah Redden	11/13/2020		P00898534
Firm's name ▶ DELOITTE TAX LLP			Firm's EIN ▶ 86-1065772	
Firm's address ▶ 50 SOUTH SIXTH STREET MINNEAPOLIS, MN 55402			Phone no. 612-397-4000	

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
CHECKING ACCOUNT INTEREST	1,073.	1,073.	
TOTAL TO PART I, LINE 3	1,073.	1,073.	

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
DIVIDENDS AND INTEREST FROM SECURITITES	511,756.	0.	511,756.	511,756.	
TO PART I, LINE 4	511,756.	0.	511,756.	511,756.	

FORM 990-PF TAXES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAXES	1,475.	0.		0.
TO FORM 990-PF, PG 1, LN 18	1,475.	0.		0.

FORM 990-PF OTHER EXPENSES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BANK SERVICE CHARGES	148.	0.		148.
TO FORM 990-PF, PG 1, LN 23	148.	0.		148.

FORM 990-PF U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS STATEMENT 5

DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
GOVERNMENT BONDS	X		1,280,671.	1,359,070.
TOTAL U.S. GOVERNMENT OBLIGATIONS			1,280,671.	1,359,070.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS				
TOTAL TO FORM 990-PF, PART II, LINE 10A			1,280,671.	1,359,070.

FORM 990-PF CORPORATE STOCK STATEMENT 6

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
EQUITY SECURITIES	5,846,062.	7,046,484.
TOTAL TO FORM 990-PF, PART II, LINE 10B	5,846,062.	7,046,484.

FORM 990-PF CORPORATE BONDS STATEMENT 7

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
FOREIGN BONDS	410,959.	443,829.
DOMESTIC BONDS	5,858,817.	6,178,246.
TOTAL TO FORM 990-PF, PART II, LINE 10C	6,269,776.	6,622,075.

FORM 990-PF EXPLANATION CONCERNING PART VII-A, LINE 8B STATEMENT 8

EXPLANATION

A COPY OF FORM 990-PF WILL BE FURNISHED TO THE ATTORNEY GENERAL IN THE STATE OF WISCONSIN.

A COPY OF FORM 990-PF IS NOT REQUIRED TO BE FURNISHED TO THE ATTORNEY GENERAL IN THE STATE OF IOWA.

FORM 990-PF — PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS — STATEMENT 9

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN-SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
CEDRIC ELLIS 5910 MINERAL POINT ROAD MADISON, WI 53705	PRESIDENT 1.00	0.	0.	0.
ANGELA RUSSELL 5910 MINERAL POINT ROAD MADISON, WI 53705	VICE PRESIDENT/ DIRECTOR 1.00	0.	0.	0.
THOMAS MERFELD 5910 MINERAL POINT ROAD MADISON, WI 53705	TREASURER 1.00	0.	0.	0.
PAUL BARBATO 5910 MINERAL POINT ROAD MADISON, WI 53705	SECRETARY 1.00	0.	0.	0.
BRIAN J. BORAKOVE 5910 MINERAL POINT ROAD MADISON, WI 53705	ASSISTANT TREASURER 1.00	0.	0.	0.
KATHERINE L. CASTRO 5910 MINERAL POINT ROAD MADISON, WI 53705	ASSISTANT SECRETARY 1.00	0.	0.	0.
KRISTINE M. CONWAY 5910 MINERAL POINT ROAD MADISON, WI 53705	ASSISTANT TREASURER 1.00	0.	0.	0.
TODD M. DUNNING 5910 MINERAL POINT ROAD MADISON, WI 53705	ASSISTANT TREASURER 1.00	0.	0.	0.
KARIM HABIB 5910 MINERAL POINT ROAD MADISON, WI 53705	DIRECTOR 1.00	0.	0.	0.
BECKI HAGERMAN 5910 MINERAL POINT ROAD MADISON, WI 53705	DIRECTOR 1.00	0.	0.	0.

JEFFREY MEYER 5910 MINERAL POINT ROAD MADISON, WI 53705	DIRECTOR 1.00	0.	0.	0.
GERALD SINGLETON II 5910 MINERAL POINT ROAD MADISON, WI 53705	DIRECTOR 1.00	0.	0.	0.
LISA WAGNER 5910 MINERAL POINT ROAD MADISON, WI 53705	DIRECTOR 1.00	0.	0.	0.
LAUREEN WINGER 5910 MINERAL POINT ROAD MADISON, WI 53705	DIRECTOR 1.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		0.	0.	0.

CUNA Mutual Group Foundation, Inc.
Form 990-PF
FEIN: 39-6105418
For the Year Ended December 31, 2019

Part XV, Item 2d, Restrictions or Limitations on Awards:

Eligible Organizations:

- Federal tax-exempt 501(c)(3) nonprofit organizations in the United States.

Ineligible Organizations:

- Organizations without IRS 501(c)(3) nonprofit status.
- Individuals
- Political parties, candidates and partisan political campaigns.
- Professional associations.
- Organizations for religious activities.
- Labor unions.
- Organizations that conflict with the company's goals or general policyowner or community interests.
- Tickets or items for fundraising events.
- Endowment funds.

CUNA MUTUAL GROUP FOUNDATION, INC. **39-6105418**
SCHEDULE OF DONATIONS
For the Period Ending December 31, 2019

Part XV, Item 3a, Grants and Contributions paid During the Year

Donee	Foundation Status of Recipient	Amount
United Way Of Dane County Inc	PC	320,027
Against Malaria Foundation	PC	30,000
Waverly-Shell Rock Area United Way Inc	PC	19,821
Forward Theater Company Inc	PC	15,000
St Paul Lutheran Church	PC	11,000
Middleton Cross Plains Area School	PC	10,767
New Heights Lutheran Church	PC	10,620
The Madison School Ltd	PC	7,650
Mount St. Mary High School	PC	7,500
Salvation Army Of Dane County	PC	7,500
Second Harvest Foodbank	PC	6,111
Waterloo Christian School	PC	6,000
Encounter Church	PC	5,000
Hartwick College	PC	5,000
Heartland Farm Sanctuary Inc	PC	5,000
Lamkidculture.Org	PC	5,000
St. Maria Goretti	PC	5,000
UW Foundation Econ Dept Fund #112291100	PC	3,500
United Way Of Central Kansas	PC	3,315
United Way Of Story County	PC	3,000
Vision Beyond Borders Inc.	PC	2,500
Madison Waldorf School	PC	2,400
United Way Bay Area	PC	2,180
Greater Twin Cities United Way	PC	2,050
Blessed Trinity Congregation Columbia	PC	2,000
Catholic Charities Of Madison	PC	2,000
Immaculate Heart Of Mary Catholic Church	PC	2,000
Dane County Humane Society	PC	1,650
United Way Of Coastal Fairfield County	PC	1,620
Saint Ambrose Academy, Inc.	PC	1,568
United Way Of Tarrant County	PC	1,560
Beebe Healthcare Medical Foundation	PC	1,500
First Unitarian Society Of Madison	PC	1,500
Strands Of Strength	PC	1,500
The Praire Enthusiasts	PC	1,500
United Way Of Chester County	PC	1,430
Easter Seals Wisconsin, Inc.	PC	1,300
Wapsie Valley Athletic Booster Club	PC	1,295

CUNA MUTUAL GROUP FOUNDATION, INC. **39-6105418**
SCHEDULE OF DONATIONS
For the Period Ending December 31, 2019

Part XV, Item 3a, Grants and Contributions paid During the Year

Donee	Foundation Status of Recipient	Amount
Women'S Care Center, Madison Inc.	PC	1,270
Central Baptist Church Crossville, Tn	PC	1,134
Nazareth Evangelical Lutheran Church	PC	1,100
100 Black Men Of Madison	PC	1,000
Angel'S Wish	PC	1,000
Center For Community Stewardship	PC	1,000
Clean Lakes Alliance, Inc.	PC	1,000
Community Of Blessed Sacrament Church	PC	1,000
First Lutheran Church Stoughton, Wi	PC	1,000
Forest Springs Camp & Conference Center	PC	1,000
Jr Memorial Cruise For A Cure	PC	1,000
Kids-N-Hope Foundation	PC	1,000
Love True, A Nj Non-Profit Organization	PC	1,000
Mercy Special Learning Center	PC	1,000
Mountain House High School	PC	1,000
North Point Ministries, Inc.	PC	1,000
Reap Food Group	PC	1,000
Road To Life Tanzania Inc.	PC	1,000
St. Martin'S Lutheran Church	PC	1,000
Tony La Russa'S Animal Rescue Foundation	PC	1,000
Wartburg College	PC	1,000
Saint Christopher Catholic Parish	PC	850
United Way Of North Central Iowa	PC	780
United Way Of The National Capital Area	PC	780
Friends Of The Family	PC	750
Newton County Trail-Path Foundation Inc.	PC	750
Centro Hispano	PC	650
United Way Of Wyoming Valley	PC	650
Samaritan'S Purse	PC	625
Wisconsin Public Radio	PC	620
12Stone Church	PC	600
Edgewood College	PC	600
Greyhound Pets Of America - Wi	PC	600
Open House Ministries	PC	600
Pathyway Church - Redlands, Ca 92374	PC	554
American Cancer Society	PC	550
Heart Of Florida United Way	PC	520
United Way Of Greater St. Louis, Inc.	PC	520

CUNA MUTUAL GROUP FOUNDATION, INC. **39-6105418**
SCHEDULE OF DONATIONS
For the Period Ending December 31, 2019

Part XV, Item 3a, Grants and Contributions paid During the Year

Donee	Foundation Status of Recipient	Amount
United Way Of Miami-Dade	PC	520
Jewish Reconstructionist Congregation	PC	520
Advocates For World-Class Education Inc	PC	500
Beagle Rescue Of Southern Maryland	PC	500
Boys & Girls Club Of Dane County	PC	500
Cannon Falls Education Foundation	PC	500
Community Shares Of Wisconsin	PC	500
Credit Unions Building	PC	500
Ebenezer Lutheran Church	PC	500
Ed Nebbins Foundation	PC	500
Fisher House; Inc.	PC	500
Foundation For Madison Public Schools	PC	500
Friends Of The Great Sauk State Trail	PC	500
Heifer Project International	PC	500
Himalayan Buddhist Community	PC	500
Jdrf - Western Wisconsin Chapter	PC	500
Madison Library Foundation	PC	500
Mission Aviation Fellowship	PC	500
Monona Grove Nursery School	PC	500
Moody Bible Institute	PC	500
Peace Lutheran Church	PC	500
Planned Parenthood Of Wisconsin	PC	500
Prader-Willi Syndrome	PC	500
Project Backpack	PC	500
Restoration Outreach Programs	PC	500
Retrieve A Golden Of The Midwest	PC	500
Scc Foundation - Arnie Stanek Graduate	PC	500
The Springs Free Will Baptist Church	PC	500
The Tom Gugel Family Fund	PC	500
Thistle Farms	PC	500
Travis Mills Foundation	PC	500
United Way Of Forsyth County, Inc.	PC	500
United Way Of Reno County, Inc.	PC	500
United Way Of Williamson County	PC	500
Middleton Outreach Ministry Inc.	PC	450
Tri 4 Schools, Inc	PC	450
United Way Of San Diego County	PC	440
Goodman Community Center	PC	425

CUNA MUTUAL GROUP FOUNDATION, INC. **39-6105418**
SCHEDULE OF DONATIONS
For the Period Ending December 31, 2019

Part XV, Item 3a, Grants and Contributions paid During the Year

Donee	Foundation Status of Recipient	Amount
Hope City Church	PC	420
United Way Of Greater Houston	PC	410
100+ Women Who Care Madison	PC	400
Fellowship Of Christian Athletes	PC	400
St Judes Children'S Research Hospital	PC	400
The River Food Pantry	PC	400
United Fund Of Iowa County, Inc.	PC	400
Carroll University Inc	PC	350
Society Of St. Vincent De Paul	PC	350
Uw Foundation Risk Management	PC	350
United Way Of Green County, Inc.	PC	350
Watertown Area United Way, Inc.	PC	350
Sauk-Prairie United Way	PC	312
United Way Of The Southern Tier	PC	312
Foundation For Madison'S Public Schools	PC	300
Revive Our Hearts	PC	300
The Francis Ouimet Scholarship Fund	PC	300
Children'S Community School	PC	275
United Way Of Harrison County, Inc.	PC	260
Knox Blocks Foundation	PC	251
Badger Aquatics Club	PC	250
Camp Hope-Heartland	PC	250
Denver Soccer Club (Non-Profit)	PC	250
Doctors Without Borders	PC	250
Go Hawk Performance Enhancement	PC	250
Hogs For Heroes, Inc.	PC	250
How To Save A Life	PC	250
International Mission Board -	PC	250
International Rescue Committee	PC	250
Leader Valley	PC	250
Madison West Athletic	PC	250
Maine Greyhound Placement Service	PC	250
Make-A-Wish	PC	250
Midwest Environmental Advocates	PC	250
Nami Wisconsin Inc	PC	250
New Hampton Junior Golf	PC	250
Rady Children'S Hospital Peckham Center	PC	250
Ronald Mcdonald House Charities	PC	250

CUNA MUTUAL GROUP FOUNDATION, INC. **39-6105418**
SCHEDULE OF DONATIONS
For the Period Ending December 31, 2019

Part XV, Item 3a, Grants and Contributions paid During the Year

Donee	Foundation Status of Recipient	Amount
San Diego Blood Bank	PC	250
Schenk Elementary Pto	PC	250
Silos & Smokestacks	PC	250
Sustain Dane	PC	250
Team Rubicon	PC	250
The First Tee Of South Central Wisconsin	PC	250
The Power Of The Giraffe	PC	250
Uw Carbone Cancer Center	PC	250
United Way Of Gloucester County, Inc.	PC	250
Waunakee Neighborhood Connection Corp	PC	250
St Pauls Lutheran Church Ecla	PC	240
Great Rivers United Way, Inc.	PC	208
A Sanctuary For Military Families, Inc.	PC	200
American Civil Liberties Union	PC	200
Blackhawk Evangelical Free Church Inc	PC	200
Bob'S House For Dogs	PC	200
California Fire Foundation	PC	200
Friends Of Nazareth	PC	200
Second Wind Fund	PC	200
Special Leisure Services Foundation	PC	200
St. Mary'S Food Bank Alliance	PC	200
Wisconsin Public Television	PC	200
United Way Of Dodge County	PC	175
Golden Belt Humane Society	PC	167
Henry Vilas Zoological Society	PC	155
Oelwein Area United Way	PC	155
Jain Society Of Metropolitan Chicago	PC	151
Acoustic Neuroma Association	PC	150
All Hands And Hearts	PC	150
Americares	PC	150
Best Friends Animal Society	PC	150
Big Brothers Big Sisters Of Dane County	PC	150
Box Of Balloons	PC	150
Fetch Wisconsin Rescue Inc.	PC	150
Green County Humane Society	PC	150
Hands Of Hope Rescue	PC	150
Immaculate Heart Media Inc.	PC	150
Macc Fund	PC	150

CUNA MUTUAL GROUP FOUNDATION, INC. **39-6105418**
SCHEDULE OF DONATIONS
For the Period Ending December 31, 2019

Part XV, Item 3a, Grants and Contributions paid During the Year

Donee	Foundation Status of Recipient	Amount
Ronald Mcdonald House Charities	PC	150
Specialty Purebred Cat Rescue	PC	150
Unbound	PC	150
United Way Of Green County	PC	150
Myteam Triumph – Wisconsin Chapter	PC	150
Cape And Islands United Way, Inc.	PC	130
Cowley County United Way, Inc.	PC	130
United Way Of North Central Mississippi	PC	130
United Way Of Salt Lake	PC	130
United Way Of Weld County	PC	130
Valley Of The Sun United Way	PC	130
Ananda Church Of Self-Realization	PC	125
Aplastic Anemia	PC	125
Be The Match	PC	125
Fellowship Of Christian Athletes -	PC	125
Pennsylvania Credit Union Foundation	PC	125
Red Shamrock Foundation	PC	125
United Way Of Treasure Valley, Inc.	PC	125
Empty Stocking Madison	PC	120
Denver Iowa Basketball Association	PC	110
Watermelon Mountain Ranch, Inc.	PC	104
Autism Science Foundation	PC	103
2617 Club Stevens Point Recovery Club	PC	100
Aspca	PC	100
Agrace	PC	100
Alzheimers Association	PC	100
Alzheimers Disease Research Foundation	PC	100
American Red Cross	PC	100
Benton Community Fund	PC	100
Cocktails Curing Cancer -- Bethany	PC	100
Cru - Bruce Boyd #0253982	PC	100
Dais (Domestic Abuse Intervention Svcs.	PC	100
Disability Rights Wisconsin, Inc.	PC	100
Family Promise Of Hillsborough County	PC	100
Glacier'S Edge Council	PC	100
Golden Retriever Rescue	PC	100
Golf Fore Wolfe & A Cure Inc.	PC	100
Good Shepherd Food Bank	PC	100

CUNA MUTUAL GROUP FOUNDATION, INC. **39-6105418**
SCHEDULE OF DONATIONS
For the Period Ending December 31, 2019

Part XV, Item 3a, Grants and Contributions paid During the Year

Donee	Foundation Status of Recipient	Amount
Heart Of West Michigan United Way	PC	100
Humane Society Of The United States	PC	100
Iowa Parrot Rescue	PC	100
JDFR	PC	100
Lake Area Music Festival	PC	100
Living Water International	PC	100
Madison Youth Choirs	PC	100
Marquette University High School	PC	100
Metroport Meals On Wheels	PC	100
Mid-Minnesota Womens Center Inc	PC	100
Midwest Dachshund Rescue	PC	100
Ny Shakespeare Exchange	PC	100
National Coalition For Homeless Veterans	PC	100
National Credit Union Foundation	PC	100
Paddys Paws, Inc.	PC	100
Park Lawn Association	PC	100
Porchlight	PC	100
Project Linus - Madison Chapter	PC	100
Providence Animal Center	PC	100
Puppyup Madison Walk	PC	100
Purple Heart Homes	PC	100
Roanoke Food Pantry	PC	100
Spca Of Texas	PC	100
Seed Saver'S Exchange	PC	100
Special Olympics Wisconsin	PC	100
St. Norbert College - T.R.I.P.S.	PC	100
The Road Home Dane County	PC	100
UW Foundation	PC	100
UW Foundation American Family Childrens	PC	100
United Way Of Aroostook	PC	100
United Way Of Central New Mexico	PC	100
United Way Of Westchester	PC	100
United Way Of The Greater Triangle, Inc.	PC	100
United Way Of The Inland Valleys	PC	100
Winman Trails Foundation	PC	100
Wisconsin Academy	PC	100
Wisconsin Heights Educational	PC	100
Wounded Warrior Project	PC	100

CUNA MUTUAL GROUP FOUNDATION, INC. **39-6105418**
SCHEDULE OF DONATIONS
For the Period Ending December 31, 2019

Part XV, Item 3a, Grants and Contributions paid During the Year

Donee	Foundation Status of Recipient	Amount
Wycliffe Bible Translators, Inc.	PC	90
Community Clothes Closet Of Mount Horeb	PC	75
German Immersion Foundation	PC	75
Literacy Network	PC	75
Pilgrim Park Middle School Pto	PC	75
St Pauls Lutheran Church Elca	PC	75
Van Hise Elementary Pto	PC	75
Sable Points Lighthouse	PC	60
Cedar Valley Friends Of The Family Inc.	PC	52
Gigi'S Playhouse Phoenix	PC	52
Together Rising	PC	52
Afs Colorado Rockies	PC	50
American Diabetes Association	PC	50
Avon Lake Community Resource Services	PC	50
Conservative Baptist Foreign	PC	50
Cru - Account 0419589	PC	50
Dian Fossey Gorilla Fund International	PC	50
Dogs On Call, Inc.	PC	50
Fondos Unidos De Puerto Rico	PC	50
Gigi'S Playhouse Madison	PC	50
International Crane Foundation	PC	50
International Foundation	PC	50
Lone Star Boxer Rescue	PC	50
Madison Cat Project	PC	50
Madison Reading Project	PC	50
Miles Of Love Rescue	PC	50
Mr. Dave'S Gift, Inc.	PC	50
New Century School Community Inc	PC	50
NPR	PC	50
New Hope Of Blount County	PC	50
Our English Setter Rescue	PC	50
Paralyzed Veterans Of America	PC	50
Roice-Hurst Humane Society, Inc.	PC	50
Ryan House	PC	50
Second Harvest	PC	50
Shepherd'S Staff Mission Facilitators	PC	50
The Bodgery	PC	50
The Book Foundation	PC	50

CUNA MUTUAL GROUP FOUNDATION, INC. **39-6105418**
SCHEDULE OF DONATIONS
For the Period Ending December 31, 2019

Part XV, Item 3a, Grants and Contributions paid During the Year

Donee	Foundation Status of Recipient	Amount
Trident United Way	PC	50
United Way	PC	50
United Way Of Columbia County	PC	50
United Way Of Greater Los Angeles	PC	50
United Way Of Greater Texarkana, Inc.	PC	50
United Way Of The Capital Area, Inc.	PC	50
United Ways Of Metro Chicago	PC	50
GSAFE	PC	50
Compassion International, Incorporated	PC	48
Habitat For Humanity	PC	40
Hope For The Day	PC	40
Simpson Housing Services	PC	40
Van Hise Parent Teacher Organization Inc	PC	35
World Vision, Inc.	PC	35
Food For The Hungry, Inc.	PC	32
Children'S Hospital	PC	30
Iowa County Humane Society	PC	30
The Navigators - Account 23758055	PC	30
American Family Children'S Hospital	PC	25
Camp Kesem	PC	25
Crespi Carmelite High School	PC	25
Depression And Bipolar Support Alliance	PC	25
Fairshare Csa Coalition	PC	25
Foothills United Way	PC	25
Georgia Public Broadcasting	PC	25
Insight For Living Ministries	PC	25
Iowa Heartland Habitat For Humanity	PC	25
Snap Of Chickasaw County Inc.	PC	25
Special Olympics Indiana	PC	25
Third Coast International Audio Festival	PC	25
United Way Of Benton & Lincoln Counties	PC	25
United Way Of Delaware	PC	25
Charity Navigator	PC	20
The USO	PC	20
University Of Northwestern-St. Paul	PC	20
Willow Creek Association	PC	20
Boys Scouts Of America Winneebago Counc	PC	250
Mt Horeb United Methodist Church	PC	250

CUNA MUTUAL GROUP FOUNDATION, INC. **39-6105418**
SCHEDULE OF DONATIONS
For the Period Ending December 31, 2019

Part XV, Item 3a, Grants and Contributions paid During the Year

Donee	Foundation Status of Recipient	Amount
Mt. Horeb United Methodist Church	PC	250
Mt. Horeb United Methodist Church	PC	250
Mt. Horeb United Methodist Church	PC	250
Affinity Rescue, Inc.	PC	250
Barneveld Tree Eagles	PC	250
Chabad Of Madison	PC	250
Wisconsin Heights Education Foundation	PC	250
Waverly Exchange Club	PC	250
JMM Ski And Snowboard Team	PC	125
Cross Community Players	PC	250
Blount County Children'S Advocacy Center	PC	250
Community Lutheran School	PC	250
Community Lutheran School	PC	250
Down Syndrome Info Network Of Twin Tier	PC	250
Jdrf International	PC	250
Project Flo Association	PC	250
Tripoli Community Club	PC	250
Waverly Area Wrestling Club	PC	250
Waverly Area Wrestling Club	PC	250
Waverly Area Wrestling Club	PC	250
Lodi High School	PC	250
Ed Nebbins Foundation, Inc.	PC	250
Franklin Junior Sabers Baseball	PC	250
Junior League Of Madison	PC	250
Salvation Army	PC	1,000
Asset Builders	PC	50,000
CEOs Of Tomorrow	PC	25,000
Children's Hospital Of Philadelphia	PC	1,000
Boys & Girls Club Of Dane County	PC	50,000
The Road Home Dane County	PC	175,000
The Uplift Foundation	PC	2,000
Tri-County Child & Family Development	PC	5,000
Big Brothers Big Sisters Of Dane County	PC	10,000
Falk Elementary School	PC	500
Friends Of Badger Rock Middle School	PC	500
Hamilton Middle School	PC	500
John Muir Elementary School	PC	500
Lussier Community Education Center	PC	100,000
Madison College	PC	400
Ole Health Foundation	PC	10,000

CUNA MUTUAL GROUP FOUNDATION, INC. **39-6105418**
SCHEDULE OF DONATIONS
For the Period Ending December 31, 2019

Part XV, Item 3a, Grants and Contributions paid During the Year

Donee	Foundation Status of Recipient	Amount
East Madison Community Center	PC	25,000
Financial Foundation Reality	PC	10,000
Waverly-Shell Rock United Way	PC	24,603
Mentoring Positives	PC	50,000
Big Brothers Big Sisters	PC	61,000
Operation Fresh Start	PC	100,000
The Beacon	PC	50,000
Madison Metropolitan School District	PC	242,390
Madison-Area Urban Ministry	PC	175,000
Agrace	PC	20,000
Domestic Abuse Intervention Services	PC	50,000
Gsafe	PC	25,000
Jazz At Lincoln Center	PC	25,000
The First Tee Of South Central Wisconsin	PC	50,000
Center For Resilient Cities	PC	25,000
Centro Hispano	PC	25,000
Chartway Federal Credit Union	PC	10,000
Common Wealth Development	PC	25,000
Horizon High School	PC	500
Susan G. Komen Wisconsin	PC	5,000
Mission Central	PC	10,000
Covantage Cares Foundation	PC	10,000
Desert Valleys Employee Foundation	PC	10,000
Big Brothers Big Sisters Of Dane County	PC	18,000
End Domestic Abuse Wisconsin	PC	55,000
Middleton Outreach Ministry	PC	50,000
Rape Crisis Center	PC	15,000
Simpson Street Free Press	PC	22,500
The Urban League Of Greater Madison	PC	50,000
Shamona Mosley Memorial Fund	PC	10,000
United Way Of Dane County	PC	450,000
Big Brothers Big Sisters Of Northeast Io	PC	21,000
Boys & Girls Clubs Of The Cedar Valley	PC	10,000
Christian Community Development Dba Hous	PC	10,000
Family & Children'S Council	PC	20,000
Friends Of The Family	PC	15,000
Leader Valley Foundation	PC	30,000
Northeast Iowa Foodbank	PC	20,000
Northstar Community Services, Inc.	PC	10,000
The Job Foundation	PC	10,000

CUNA MUTUAL GROUP FOUNDATION, INC. **39-6105418**
SCHEDULE OF DONATIONS
For the Period Ending December 31, 2019

Part XV, Item 3a, Grants and Contributions paid During the Year

Donee	Foundation Status of Recipient	Amount
The Larrabee Center, Inc.	PC	15,000
Waverly-Shell Rock Middle School	PC	5,000
YWCA Black Hawk County	PC	10,000
Waverly-Shell Rock United Way	PC	17,000
Maydm, Inc.	PC	75,000
One City Schools, Inc.	PC	125,000
Second Harvest Food Bank	PC	200,000
Wisconsin Early Childhood Association	PC	25,000
Economic Justice Initiative	PC	50,000
Omega School	PC	50,000
Porchlight, Inc.	PC	50,000
Goodman Community Center	PC	200,000
YWCA Madison	PC	100,000
		3,804,768

CUNA MUTUAL GROUP FOUNDATION, INC.
Approved Commitments by Year
For the Years Ended December 31, 2019, 2020, 2021, 2022 and 2023

Part XV, Item 3b, Grants and Contributions Approved for Future Payment

Multi-Year Commitments (as of 12/31/19)

Organization	2020	2021	2022
United Way Campaign Pledge (Dane County)[1]	$ -	$ -	$ -
Employee Giving Campaign (see appendix A)[1]	-	-	-
United Way Campaign Pledge (Dane County)[1]	375,000		
United Way Campaign Pledge (Other Locations)[1]	75,000		
Employee Giving Campaign[1]	750,000		
United Way Waverly Match	-	-	-
Center for Resilient Cities	-	-	-
Centro Hispano	25,000	25,000	-
Economic Justice Initiative, Inc	-	-	-
Madison Area Urban Ministry (MUM)*	175,000	-	-
The Beacon	-	-	-
The Road Home Dane County - Building Grant	175,000	175,000	-
Madison Metropolitan School District	-	-	-
The Urban League	-	-	-
Agrace Hospice	-	-	-
DAIS	-	-	-
WI Coalition Against Domestic Violence	-	-	-
Simpson Street Free Press	-	-	-
Rape Crisis Center	-	-	-
Essential Ellington	-	-	-
GSAFE	-	-	-
Lussier Community Center	-	-	-
First Tee of South Central Wisconsin	-	-	-
Operation Fresh Start	100,000	-	-
One City Schools - Operational Support	-	-	-
Maydm, Inc	-	-	-
Goodman Community Center	200,000	200,000	-
Omega School	-	-	-
East Madison Community Center	25,000	-	-
CEOs of Tomorrow	25,000	-	-
Big Brothers Big Sisters - Capacity Building**	-	-	-
Big Brothers Big Sisters - Community Schools**	-	-	-
Asset Builders**	25,000	-	-
Mentoring Positives	-	-	-
Boys & Girls Club Dane County	50,000	50,000	-
Common Wealth Development	25,000	25,000	-
Middleton Outreach Ministry (MOM)			
Wisconsin Early Childhood Association (WECA)			
Porchlight, Inc.			
Northeast Iowa Food Bank			
YWCA Madison	100,000	-	-
Second Harvest Food Bank			
Total Commitments	$ 2,125,000	$ 475,000	$ -