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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. 1545-0052

2019

Open to Public Inspection

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

Name of foundation
Marion and Henry Bloch Family Foundation

% DAVID MILES

A Employer identification number
45-4047901

Number and street (or P.O. box number if mail is not delivered to street address)
1 H and R Block Way

Room/suite

B Telephone number (see instructions)
(816) 854-4361

City or town, state or province, country, and ZIP or foreign postal code
Kansas City, MO 641051905

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: ☑ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

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)* ▶$ 421,817,140

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

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

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

			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc., received (attach schedule)	120,239,989			
	2	Check ▶ ☐ if the foundation is **not** required to attach Sch. B				
	3	Interest on savings and temporary cash investments	27,090	27,090		
	4	Dividends and interest from securities	6,848,741	6,588,904		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	5,742,198			
	b	Gross sales price for all assets on line 6a 248,934,250				
	7	Capital gain net income (from Part IV, line 2)		7,101,147		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less: Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)	48,229,052	877,390		
	12	**Total.** Add lines 1 through 11	181,087,070	14,594,531		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc.	182,077	29,132		152,945
	14	Other employee salaries and wages	141,120	22,579		118,541
	15	Pension plans, employee benefits	40,030	6,405		33,625
	16a	Legal fees (attach schedule)	14,665	733	0	13,932
	b	Accounting fees (attach schedule)	73,683	28,854	0	22,105
	c	Other professional fees (attach schedule)	2,091,190	1,893,452		187,254
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	335,411	259		
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy	4,446	222		4,224
	21	Travel, conferences, and meetings	5,994	300		5,694
	22	Printing and publications				
	23	Other expenses (attach schedule)	33,201	106		25,962
	24	**Total operating and administrative expenses.** Add lines 13 through 23	2,921,817	1,982,042	0	564,282
	25	Contributions, gifts, grants paid	13,053,287			13,053,287
	26	**Total expenses and disbursements.** Add lines 24 and 25	15,975,104	1,982,042	0	13,617,569
	27	Subtract line 26 from line 12:				
	a	**Excess of revenue over expenses and disbursements**	165,111,966			
	b	**Net investment income** (if negative, enter -0-)		12,612,489		
	c	**Adjusted net income** (if negative, enter -0-)				

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	628,450	455,616	455,616
	2 Savings and temporary cash investments	14,269,814	17,827,003	17,827,003
	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)			
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment: basis ▶			
	Less: accumulated depreciation (attach schedule) ▶			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	241,776,529	400,905,723	400,905,723
	14 Land, buildings, and equipment: basis ▶			
	Less: accumulated depreciation (attach schedule) ▶			
	15 Other assets (describe ▶)	19,897	2,628,798	2,628,798
	16 **Total assets** (to be completed by all filers—see the instructions. Also, see page 1, item I)	256,694,690	421,817,140	421,817,140
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 ▶)	40,874	51,358	
	23 **Total liabilities**(add lines 17 through 22)	40,874	51,358	
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	256,653,816	421,765,782	
	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)	256,653,816	421,765,782	
	30 **Total liabilities and net assets/fund balances** (see instructions)	256,694,690	421,817,140	

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	256,653,816
2	Enter amount from Part I, line 27a	2	165,111,966
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	421,765,782
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	421,765,782

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	See Additional Data Table			
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	See Additional Data Table			
b				
c				
d				
e				

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) **or** Losses (from col.(h))
	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a	See Additional Data Table			
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	7,101,147
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 does not qualify under section 4940(e). Do not complete this part.

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2018	13,248,037	275,562,624	0.048076
2017	12,517,055	270,027,662	0.046355
2016	12,858,929	249,065,213	0.051629
2015	13,270,716	261,508,339	0.050747
2014	8,417,928	268,330,144	0.031372

2	**Total** of line 1, column (d)	2	0.228179
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	0.045636
4	Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	304,345,248
5	Multiply line 4 by line 3	5	13,889,100
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	126,125
7	Add lines 5 and 6	7	14,015,225
8	Enter qualifying distributions from Part XII, line 4	8	14,867,569

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	126,125
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	
3	Add lines 1 and 2	3	126,125
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5	**Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-	5	126,125
6	Credits/Payments:		
a	2019 estimated tax payments and 2018 overpayment credited to 2019 — 6a: 182,772		
b	Exempt foreign organizations—tax withheld at source — 6b:		
c	Tax paid with application for extension of time to file (Form 8868) — 6c: 60,000		
d	Backup withholding erroneously withheld — 6d:		
7	Total credits and payments. Add lines 6a through 6d	7	242,772
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	116,647
11	Enter the amount of line 10 to be: **Credited to 2020 estimated tax** ▶ 116,647 **Refunded** ▶	11	

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition)	1b		No
	*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		No
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		No
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		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a	Yes	
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b	Yes	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		No
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	Yes	
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	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ MO			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation* .	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2019 or the taxable year beginning in 2019? See the instructions for Part XIV. If "Yes," complete Part XIV	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses.*	10	Yes	

Part VII-A Statements Regarding Activities (continued)

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		No
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		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	

Website address ▶ BLOCHFAMILYFOUNDATION.ORG

14 The books are in care of ▶ DAVID MILES Telephone no. ▶ (816) 854-4372

Located at ▶ 1 H AND R BLOCK WAY Kansas City MO ZIP+4 ▶ 64105

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 ▶	16		No

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.

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		No
	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		No
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 (lines 6d and 6e, Part XIII) 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		No
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 Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2019.)*	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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		No

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	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? ☐ 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		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?	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 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, foundation managers and their compensation. See instructions

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

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

(a) Name and address of each employee paid more than $50,000	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
JEAN-PAUL CHAURAND 1 H AND R BLOCK WAY KANSAS CITY, MO 641051905	EXEC VICE PRESIDENT 40.0	90,132	15,019	0
RACHEL CARLTON 1 H AND R BLOCK WAY KANSAS CITY, MO 641051905	ASSOC GRANT DIRECTOR 40.0	50,988	6,505	0

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
HRB MANAGEMENT INC 1 H R BLOCK WAY KANSAS CITY, MO 64105	MANAGEMENT	183,885
CAMBRIDGE ASSOCIATES LLC 100 SUMMER STREET BOSTON, MA 02110	INVESTMENT ADVISOR	401,811

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

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

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

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1	
2	
All other program-related investments. See instructions. 3	
Total. Add lines 1 through 3 . . . . . ▶	

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	211,448,491
b	Average of monthly cash balances	1b	14,640,848
c	Fair market value of all other assets (see instructions)	1c	82,890,608
d	**Total** (add lines 1a, b, and c)	1d	308,979,947
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) — 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	308,979,947
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	4,634,699
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	304,345,248
6	**Minimum investment return.** Enter 5% of line 5	6	15,217,262

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	15,217,262
2a	Tax on investment income for 2019 from Part VI, line 5	2a	126,125		
b	Income tax for 2019. (This does not include the tax from Part VI.)	2b			
c	Add lines 2a and 2b			2c	126,125
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	15,091,137
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	15,091,137
6	Deduction from distributable amount (see instructions)			6	
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1			7	15,091,137

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	13,617,569
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	0
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	0
b	Cash distribution test (attach the required schedule)	3b	1,250,000
4	**Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	14,867,569
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	126,125
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	14,741,444

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				15,091,137
2 Undistributed income, if any, as of the end of 2019:				
a Enter amount for 2018 only			13,094,524	
b Total for prior years: 2017 , 2016 , 2015				
3 Excess distributions carryover, if any, to 2019:				
a From 2014				
b From 2015				
c From 2016				
d From 2017				
e From 2018				
f **Total** of lines 3a through e				
4 Qualifying distributions for 2019 from Part XII, line 4: ▶ $ 14,867,569				
a Applied to 2018, but not more than line 2a			13,094,524	
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				1,773,045
e Remaining amount distributed out of corpus	0			
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	0			
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				13,318,092
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)				
8 Excess distributions carryover from 2014 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a	0			
10 Analysis of line 9:				
a Excess from 2015				
b Excess from 2016				
c Excess from 2017				
d Excess from 2018				
e Excess from 2019	0			

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

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

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

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

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

1 Information Regarding Foundation Managers:

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

HENRY W BLOCH

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

NONE

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

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

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

MARIONHENRY BLOCH FAM FOUNDATION
1 H AND R BLOCK WAY
KANSAS CITY, MO 64105
(816) 854-4361

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

VISIT BLOCHFAMILYFOUNDATION.ORG FOR GRANT APPLICATIONS AND SUBMISSION GUIDELINES.

c Any submission deadlines:

VISIT BLOCHFAMILYFOUNDATION.ORG FOR CURRENT SUBMISSION DEADLINES.

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

THE FOUNDATION GENERALLY MAKES ONE-YEAR GRANTS. HOWEVER, THE FOUNDATION WILL CONSIDER MULTI-YEAR REQUESTS. GRANTS ARE MADE ONLY TO TAX EXEMPT 501(C)(3) ORGANIZATONS THAT ARE NOT CLASSIFIED AS PRIVATE FOUNDATIONS. THE FOUNDATION CONSIDERS SUPPORT FOR ORGANIZATIONS THAT ARE BASED IN AND SERVICE RESIDENTS WITHIN THE GREATER KANSAS CITY AREA.

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 Additional Data Table				
Total . . . . . ▶ **3a**				13,053,287
b *Approved for future payment* See Additional Data Table				
Total . . . . . ▶ **3b**				18,983,500

Part XVI-A Analysis of Income-Producing Activities

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			14	27,090	
4 Dividends and interest from securities			14	6,848,741	
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	5,742,198	
9 Net income or (loss) from special events:					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a UNREALIZED GAIN (LOSS) ON INVESTMENTS			14	48,229,052	
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)				60,847,081	
13 **Total.** Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calculations.)				13	60,847,081

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

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

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

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

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

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

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

b If "Yes," complete the following schedule.

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

Sign Here

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

******	2020-11-16	******
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
Michael J Engle				P00482834
Firm's name ▶ BKD LLP				Firm's EIN ▶
Firm's address ▶ 1201 Walnut Suite 1700 Kansas City, MO 641062246				Phone no. (816) 221-6300

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

List and describe the kind(s) of property sold (e.g., real estate, **(a)** 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	**(b)** How acquired P—Purchase D—Donation	**(c)** Date acquired (mo., day, yr.)	**(d)** Date sold (mo., day, yr.)
MPLX LP			
NUSTAR ENERGY			
PHILLIPS 66 PTRS			
WESTERN MIDSTREAM PTRS			
CID CAPITAL OPPORTUNITY FUND II			
OAKWOOD RE PTRS II			
PARAMETRIC GLOBAL DEFENSIVE			
RENAISSANCE INSTITUTIONAL			
RIVERVEST VENTURE FUND III			
WELLINGTON TRUST CO			

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

(e) Gross sales price	Depreciation allowed **(f)** (or allowable)	Cost or other basis **(g)** plus expense of sale	Gain or (loss) **(h)** (e) plus (f) minus (g)
			972
			-1,375
			23
			477
			795,100
			60,107
			578,486
			21,098
			2,135
			767,177

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

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

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

List and describe the kind(s) of property sold (e.g., real estate, **(a)** 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	**(b)** How acquired P—Purchase D—Donation	**(c)** Date acquired (mo., day, yr.)	**(d)** Date sold (mo., day, yr.)
WINGATE PTRS V			
BUCKEYE PARTNERS			
PUBLICLY TRADED SECURITIES			
NHIT: CREDIT ASSET TRUST			
FIR TRUST INTERNATIONAL VALUE FUND II			
FIR TRUST INTERNATIONAL VALUE FUND			
DOVER STREET IX CAYMAN FUND			
LITTLEJOHN OPPORTUNITIES FUND II			
AXIOM ASIA IV LP			
ARTEMIS REAL ESTATE PTRS HEALTHCARE FUND			

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

(e) Gross sales price	Depreciation allowed **(f)** (or allowable)	Cost or other basis **(g)** plus expense of sale	Gain or (loss) **(h)** (e) plus (f) minus (g)
			-624,981
			-10,194
248,934,250		243,684,606	5,249,644
			75,031
			68,270
			-75,890
			351,627
			-200,052
			819
			4,318

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			Gains (Col. (h) gain minus col. (k), but not less than -0-) **or** **(l)** Losses (from col.(h))
(i) F.M.V. as of 12/31/69	Adjusted basis **(j)** as of 12/31/69	Excess of col. (i) **(k)** over col. (j), if any	
			5,249,644

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

List and describe the kind(s) of property sold (e.g., real estate, **(a)** 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	**(b)** How acquired P—Purchase D—Donation	**(c)** Date acquired (mo., day, yr.)	**(d)** Date sold (mo., day, yr.)
AXIOM ASIA V LP			
ARROWSTREET INTERNATIONAL EQUITY			

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

(e) Gross sales price	Depreciation allowed **(f)** (or allowable)	Cost or other basis **(g)** plus expense of sale	Gain or (loss) **(h)** (e) plus (f) minus (g)
			-9,103
			47,458

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

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

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

(a) Name and address	Title, and average hours per week **(b)** devoted to position	**(c)** Compensation **(If not paid, enter -0-)**	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
HENRY W BLOCH 1 H and R Block Way Kansas City, MO 641051905	CHAIRMAN EMERITUS & DIRECTOR 0.75	0	0	0
THOMAS M BLOCH 1 H and R Block Way Kansas City, MO 641051905	CHAIRMAN & DIRECTOR 3.0	0	0	0
ROBERT L BLOCH 1 H and R Block Way Kansas City, MO 641051905	V. CHAIRMAN/TREASURER/DIRECTOR 0.5	0	0	0
MARY JO BROWN 1 H and R Block Way Kansas City, MO 641051905	ASSISTANT SECRETARY & DIRECTOR 0.5	0	0	0
BRUCE C DAVISON 1 H and R Block Way Kansas City, MO 641051905	VICE CHAIRMAN & DIRECTOR 0.5	0	0	0
WILLIAM A HALL 1 H and R Block Way Kansas City, MO 641051905	DIRECTOR 0.75	0	0	0
EDWARD T MATHENY JR 1 H and R Block Way Kansas City, MO 641051905	DIRECTOR 0.5	0	0	0
JOHN R PHILLIPS 1 H and R Block Way Kansas City, MO 641051905	DIRECTOR 0.5	0	0	0
MORTON I SOSLAND 1 H and R Block Way Kansas City, MO 641051905	DIRECTOR 0.5	0	0	0
ELIZABETH A UHLMANN 1 H and R Block Way Kansas City, MO 641051905	SECRETARY & DIRECTOR 0.5	0	0	0
LEO MORTON 1 H and R Block Way Kansas City, MO 641051905	DIRECTOR 0.25	0	0	0
DAVID P MILES 1 H and R Block Way Kansas City, MO 641051905	PRESIDENT 30.0	182,077	18,506	0
DEBBIE SOSLAND-EDELMAN 1 H and R Block Way Kansas City, MO 641051905	DIRECTOR 0.25	0	0	0
SCOTT ANDREASEN 1 H and R Block Way Kansas City, MO 641051905	ASSISTANT TREASURER 0.5	0	0	0

Form 990PF Part XV Line 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*				
American Public Square Inc 300 E 39th Street Kansas City, MO 64111	NONE	PC	MHBFF Board of Directors Matching Gift Program	650
American Public Square Inc 300 E 39th Street Kansas City, MO 64105	NONE	PC	MHBFF Board of Directors Matching Gift Program	2,000
Anna and Max Zalcman Torah Learning Center 8800 W 103rd St Overland Park, KS 66212	JEWISH COMM ORG	PC	the Kosher Meals on Wheels program	5,000
Total . . . . . ▶ **3a**				13,053,287

Form 990PF Part XV Line 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*				
ARTS KC-Regional Arts Council 106 Southwest Blvd Kansas City, MO 64105	NONE	PC	MHBFF Board of Directors Matching Gift Program	666
Avodah125 Maiden Lane New York, NY 100385041	JEWISH COMM ORG	PC	continued engagement with the Avodah Justice Fello	6,000
Boys and Girls Clubs of Greater Kansas City 4001 Blue Parkway Kansas City, MO 64130	NONE	PC	construction of and expanded programming for the J	100,000
Total . . . . . ▶ **3a**				13,053,287

Form 990PF Part XV Line 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*				
Children's Mercy Hospital 2401 Gillham Road Kansas City, MO 641084619	NONE	PC	Bloch Family Matching Gift Program	4,000
Children's Mercy Hospital 2401 Gillham Road Kansas City, MO 64105	NONE	PC	MHBFF Board of Directors Matching Gift Program	5,000
Children's Mercy Hospital 2401 Gillham Road Kansas City, MO 641084619	NONE	PC	the Children's Mercy East expansion project.	250,000
Total . . . . . ▶ **3a**				13,053,287

Form 990PF Part XV Line 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*				
Children's Mercy Hospital 2402 Gillham Road Kansas City, MO 641084620	NONE	PC	the Children's Mercy East expansion project.	250,000
City Year Kansas City415 Delaware St Kansas City, MO 64105	NONE	PC	expansion to Whittier Elementary School.	100,000
Community LINCPO Box 32697 Kansas City, MO 64171	NONE	PC	MHBFF Board of Directors Matching Gift Program	5,000
Total . . . . . ▶ **3a**				13,053,287

Form 990PF Part XV Line 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*				
Credit & Homeownership Empowerment Services 3125 Gillham Plaza Kansas City, MO 64109	NONE	PC	Project ""Build, Restore, Engage""	71,000
Crossroads Charter Schools1011 Central Kansas City, MO 64105	NONE	PC	renovations and equipment for Crossroads Preparato	50,000
Donnelly College608 N 18th Street Kansas City, KS 66102	NONE	PC	the new academic building.	250,000
Total . . . . . ▶ **3a**				13,053,287

Form 990PF Part XV Line 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*				
Donnelly College608 N 18th Street Kansas City, KS 66102	NONE	PC	the new academic building.	250,000
Elevate Metro KCPO Box 4477 Overland Park, KS 66204	NONE	PC	program growth at Southeast High School	34,000
Fremar Foundation2816 W 87th Terrace Leawood, KS 662061606	NONE	PC	MHBFF Board of Directors Matching Gift Program	200
Total . . . . . ▶ **3a**				13,053,287

Form 990PF Part XV Line 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*				
Friends of University Academy 8080 Ward Parkway Kansas City, MO 64114	NONE	PC	MHBFF Board of Directors Matching Gift Program	5,000
Friends of University Academy 8080 Ward Parkway Kansas City, MO 64114	NONE	PC	expansion of the Career Acceleration Program	75,000
Grandview Park Presbyterian Church 1613 Wilson Blvd Kansas City, KS 66102	NONE	PC	MHBFF Board of Directors Matching Gift Program	2,000
Total . . . . . ▶ **3a**				13,053,287

Form 990PF Part XV Line 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*				
Greater Kansas City Hispanic Development Fund 1055 Broadway Blvd Kansas City, MO 64105	NONE	PC	the HDF Bilingual Family College Prep Program	100,000
Harry S Truman Library Institute for National and 5151 Troost Ave Kansas City, MO 64110	NONE	PC	expanding President Truman's Classroom for Democra	250,000
Harvesters - The Community Food Network 3801 Topping Avenue Kansas City, MO 64129	NONE	PC	In honor of Morton Sosland	10,000
Total . . . . . ▶ **3a**				13,053,287

Form 990PF Part XV Line 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*				
Henry W Bloch School of Management Fund at the Gr 1055 Broadway Kansas City, MO 64105	LEGACY ORG	PC	activites of the Henry W. Bloch School of Manageme	5,380,000
High Aspirations6320 Brookside Plaza Kansas City, MO 641131709	NONE	PC	MHBFF Board of Directors Matching Gift Program	400
High Aspirations6320 Brookside Plaza Kansas City, MO 641131709	NONE	PC	building renovations and future programming	25,000
Total . . . . . ▶ **3a**				13,053,287

Form 990PF Part XV Line 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*				
Hyman Brand Hebrew Academy 5801 West 11th Street Overland Park, KS 662111800	JEWISH COMM ORG	PC	ongoing programs and operations	107,000
Jackson County Historical Society PO Box 4241 Independence, MO 640514241	NONE	PC	MHBFF Board of Directors Matching Gift Program	200
Jewish Community Center of Greater Kansas City 5801 W 115th Street Overland Park, KS 66211	JEWISH COMM ORG	PC	ongoing programs and operations	10,000
Total . . . . . ▶ **3a**				13,053,287

Form 990PF Part XV Line 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*				
Jewish Community Center of Greater Kansas City 5801 W 115th Street Overland Park, KS 66211	NONE	PC	non-sports related aspects of the Jewish Community	50,000
Jewish Community Relations Bureau-American Jewish 5801 W 115th Street Overland Park, KS 66211	JEWISH COMM ORG	PC	ongoing programs and operations	40,000
Jewish Family Services 5801 W 115th Street Overland Park, KS 66211	NONE	PC	Bloch Family Matching Gift Program	500
Total . . . . . ▶ **3a**				13,053,287

Form 990PF Part XV Line 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*				
Jewish Family Services 5801 W 115th Street Overland Park, KS 66211	JEWISH COMM ORG	PC	ongoing programs and operations	25,000
Jewish Federation of Greater Kansas City 5801 W 115th Street Overland Park, KS 662111800	NONE	PC	Bloch Family Matching Gift Program	1,000
Jewish Federation of Greater Kansas City 5801 W 115th Street Overland Park, KS 662111800	NONE	PC	MHBFF Board of Directors Matching Gift Program	6,500
Total . . . . . ▶ **3a**				13,053,287

Form 990PF Part XV Line 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*				
Jewish Federation of Greater Kansas City 5801 W 115th Street Overland Park, KS 662111800	NONE	PC	MHBFF Board of Directors Matching Gift Program	6,666
Jewish Federation of Greater Kansas City 5802 W 115th Street Overland Park, KS 662111800	JEWISH COMM ORG	PC	improve critical security measures	50,000
Jewish Federation of Greater Kansas City 5801 W 115th Street Overland Park, KS 662111800	JEWISH COMM ORG	PC	ongoing programs and operations	250,000
Total . . . . . ▶ **3a**				13,053,287

Form 990PF Part XV Line 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*				
Jewish Vocational Service 4600 The Paseo Kansas City, MO 64110	JEWISH COMM ORG	PC	ongoing programs and operations	5,000
Kansas City Art Institute 4415 Warwick Blvd Kansas City, MO 64111	NONE	PC	the Space to Create capital campaign	100,000
Kansas City Girls Preparatory Academy 5000 East 17th Street Kansas City, MO 64127	NONE	PC	facility renovations	75,000
Total . . . . . ▶ **3a**				13,053,287

Form 990PF Part XV Line 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*				
Kansas City Museum Foundation Inc 4600 E 63rd Kansas City, MO 64130	NONE	PC	MHBFF Board of Directors Matching Gift Program	5,256
Kansas City Pet Project 4400 Raytown Rd Kansas City, MO 641292185	NONE	PC	Bloch Family Matching Gift Program	1,500
Kansas City Pre-K Cooperative Fund at the Greater 1055 Broadway St Kansas City, MO 64105	NONE	PC	the Kansas City Pre-K Cooperative Fund at the Grea	50,000
Total . . . . . ▶ **3a**				13,053,287

Form 990PF Part XV Line 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*				
Kansas City Repertory Theatre 4825 Troost Ave Kansas City, MO 64110	NONE	PC	BSEB Matching Gift Program	650
Kansas City Repertory Theatre 4825 Troost Ave Kansas City, MO 64110	NONE	PC	MHBFF Board of Directors Matching Gift Program	2,000
Kansas City Repertory Theatre 4825 Troost Ave Kansas City, MO 64110	NONE	PC	BSEB Matching Gift Program	10,000
Total . . . . . ▶ **3a**				13,053,287

Form 990PF Part XV Line 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*				
Kansas City Repertory Theatre 4825 Troost Ave Kansas City, MO 64110	NONE	PC	the Creative Future Fund.	50,000
Kansas City Symphony 1703 Wyandotte St Kansas City, MO 64108	NONE	PC	the Investment in Excellence Initiative	100,000
Kansas University Endowment Association 3901 Rainbow Blvd Kansas City, KS 66160	NONE	PC	MHBFF Board of Directors Matching Gift Program	3,000
Total . . . . . ▶ **3a**				13,053,287

Form 990PF Part XV Line 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*				
Kauffman Center for the Performing Arts 1601 Broadway Kansas City, MO 64108	NONE	PC	security infrastructure for the Kauffman Center fo	43,000
KCPT- Public Television 19 125 East 31st Street Kansas City, MO 64108	NONE	PC	MHBFF Board of Directors Matching Gift Program	5,000
KCPT- Public Television 19 125 East 31st Street Kansas City, MO 64108	NONE	PC	unrestricted gift in honor of Ed Matheny	10,000
Total . . . . . ▶ **3a**				13,053,287

Form 990PF Part XV Line 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*				
KCPT- Public Television 19 125 East 31st Street Kansas City, MO 64108	NONE	PC	the Kansas City Picture This campaign	100,000
Liberty Memorial Association dba National World 2 Memorial Drive Kansas City, MO 641084603	NONE	PC	2019 Night at the Tower Annual Gala.	50,000
Mid-America Regional Council 600 Broadway Blvd Kansas City, MO 64105	NONE	PC	KC Degrees.	50,000
Total . . . . . ▶ **3a**				13,053,287

Form 990PF Part XV Line 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*				
Midwest Center for Holocaust Education 5801 W 115Th St Overland Park, KS 662111800	JEWISH COMM ORG	PC	ongoing programs and operations	8,000
Miracle Of Innocence Inc13725 Metcalf Overland Park, KS 66223	NONE	PC	MHBFF Board of Directors Matching Gift Program	1,600
National Museum Of Toys And Miniatures 5235 Oak Street Kansas City, MO 641122877	NONE	POF	MHBFF Board of Directors Matching Gift Program	2,000
Total . . . . . ▶ **3a**				13,053,287

Form 990PF Part XV Line 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*				
New Reform Temple7100 Main Kansas City, MO 64114	NONE	PC	Rabbi's Discretionary Fund	500
New Reform Temple7100 Main Kansas City, MO 64114	NONE	PC	MHBFF Board of Directors Matching Gift Program	2,000
New Reform Temple7100 Main Kansas City, MO 64114	NONE	PC	MHBFF Board of Directors Matching Gift Program	15,000
Total . . . . . ▶ **3a**				13,053,287

Form 990PF Part XV Line 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*				
Parkinson's Foundation 200 SE 1st Street Miami, FL 33131	NONE	PC	in memory of Milton H. Klaas of Freeport, IL	100
Pembroke Hill School400 W 51st St Kansas City, MO 641122316	NONE	PC	Bloch Family Matching Gift Program	500
Pembroke Hill School400 W 51st St Kansas City, MO 641122316	NONE	PC	MHBFF Board of Directors Matching Gift Program	500
Total . . . . . ▶ **3a**				13,053,287

Form 990PF Part XV Line 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*				
Pembroke Hill School400 W 51st St Kansas City, MO 641122316	NONE	PC	Bloch Family Matching Gift Program	1,500
Plaza Academy 3930 Broadway Boulevard Kansas City, MO 64111	NONE	PC	Bloch Family Matching Gift Program	3,000
Police Foundation of Kansas City PO Box 25198 Kansas City, MO 64119	NONE	PC	MHBFF Board of Directors Matching Gift Program	2,000
Total . . . . . ▶ **3a**				13,053,287

Form 990PF Part XV Line 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*				
reStart Inc918 E 9th Street Kansas City, MO 64106	NONE	PC	the organization's Recovery Plan	50,000
Rightfully Sewn (co Community Capital Fund org's 1800 Wyandotte St Kansas City, MO 64108	NONE	PC	Bloch Family Matching Gift Program	500
Rightfully Sewn (co Community Capital Fund org's 1800 Wyandotte St Kansas City, MO 64108	NONE	PC	MHBFF Board of Directors Matching Gift Program	825
Total . . . . . ▶ **3a**				13,053,287

Form 990PF Part XV Line 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*				
Saint Luke's Foundation 901 E 104th Street Kansas City, MO 64131	NONE	PC	MHBFF Board of Directors Matching Gift Program	200
Saint Luke's Foundation 901 E 104th Street Kansas City, MO 64131	NONE	PC	MHBFF Board of Directors Matching Gift Program	1,250
Saint Luke's Foundation 901 E 104th Street Kansas City, MO 64131	NONE	PC	MHBFF Board of Directors Matching Gift Program	10,000
Total . . . . . ▶ **3a**				13,053,287

Form 990PF Part XV Line 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*				
Saint Luke's Foundation 901 E 104th Street Kansas City, MO 64131	NONE	PC	Gift to Saint Luke's Home Care & Hospice, in memor	50,000
Saint Luke's Foundation 901 E 104th Street Kansas City, MO 64131	LEGACY ORG	PC	SLMBNI Five Year Strategy (2019-2023)	1,300,000
Saint Luke's Foundation 901 E 104th Street Kansas City, MO 64131	LEGACY ORG	PC	SLMBNI Five Year Strategy (2019-2023)	1,300,000
Total . . . . . ▶ **3a**				13,053,287

Form 990PF Part XV Line 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*				
Sasone Committee at the Jewish Federation of Great 5801 W 115th St Overland Park, KS 662111800	JEWISH COMM ORG	PC	ongoing programs and operations	10,000
St Paul's Episcopal Day School 4041 Main Street Kansas City, MO 64111	NONE	PC	MHBFF Board of Directors Matching Gift Program	200
Swope Corridor RenaissanceThe Upper Room Inc 300 E 39th Street Kansas City, MO 64111	NONE	PC	the purchase and installation of playground equipm	68,300
Total . . . . . ▶ **3a**				13,053,287

Form 990PF Part XV Line 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*				
The Children's Place2 E 59th Street Kansas City, MO 64133	NONE	PC	MHBFF Board of Directors Matching Gift Program	1,300
The Nelson Gallery Foundation 4525 Oak Street Kansas City, MO 641111818	NONE	PC	MHBFF Board of Directors Matching Gift Program	175
The Nelson Gallery Foundation 4525 Oak Street Kansas City, MO 641111818	NONE	PC	MHBFF Board of Directors Matching Gift Program	1,214
Total . . . . . ▶ **3a**				13,053,287

Form 990PF Part XV Line 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*				
The Nelson Gallery Foundation 4525 Oak Street Kansas City, MO 641111818	NONE	PC	MHBFF Board of Directors Matching Gift Program	1,500
The Nelson Gallery Foundation 4525 Oak Street Kansas City, MO 641111818	NONE	PC	Unrestricted	10,000
The Nelson Gallery Foundation 4525 Oak Street Kansas City, MO 641111818	LEGACY ORG	PC	the museum's efforts to further advance the Bloch	200,000
Total . . . . . ▶ **3a**				13,053,287

Form 990PF Part XV Line 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*				
The Nelson Gallery Foundation 4525 Oak Street Kansas City, MO 641111818	LEGACY ORG	PC	the museum's efforts to further advance the Bloch	500,000
The Nelson Gallery Foundation 4525 Oak Street Kansas City, MO 641111818	LEGACY ORG	PC	the museum's efforts to further advance the Bloch	500,000
The Temple Congregataion B'nai Jehudah 12320 Nall Ave Overland Park, KS 66209	NONE	PC	Rabbi's Discretionary Fund	500
Total . . . . . ▶ **3a**				13,053,287

Form 990PF Part XV Line 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*				
The Temple Congregation B'nai Jehudah 12320 Nall Ave Overland Park, KS 66209	NONE	PC	MHBFF Board of Directors Matching Gift Program	370
The Temple Congregation B'nai Jehudah 12320 Nall Ave Overland Park, KS 66209	NONE	PC	MHBFF Board of Directors Matching Gift Program	700
The Temple Congregation B'nai Jehudah 12320 Nall Ave Overland Park, KS 66209	NONE	PC	MHBFF Board of Directors Matching Gift Program	4,915
Total . . . . . ▶ **3a**				13,053,287

Form 990PF Part XV Line 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*				
UMKC Foundation5115 Oak St Kansas City, MO 64112	NONE	PC	MHBFF Board of Directors Matching Gift Program	600
UMKC Foundation5115 Oak St Kansas City, MO 64112	NONE	PC	BSEB Matching Gift Program	650
UMKC Foundation5115 Oak St Kansas City, MO 64112	NONE	PC	Gift designated for the UMKC Conservatory of Music	2,500
Total . . . . . ▶ **3a**				13,053,287

Form 990PF Part XV Line 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*				
UMKC Foundation5115 Oak St Kansas City, MO 64112	NONE	PC	BSEB Matching Gift Program	3,000
UMKC Foundation5115 Oak St Kansas City, MO 64112	NONE	PC	MHBFF Board of Directors Matching Gift Program	3,200
UMKC Foundation5115 Oak St Kansas City, MO 64112	NONE	PC	34th Annual Entrepreneur of the Year Awards Ceremo	10,000
Total . . . . . ▶ **3a**				13,053,287

Form 990PF Part XV Line 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*				
UMKC Foundation5115 Oak St Kansas City, MO 64112	NONE	PC	BSEB Matching Gift Program	10,000
UMKC Foundation5115 Oak St Kansas City, MO 64112	NONE	PC	intensive support services provided for students a	45,000
UMKC Foundation5115 Oak St Kansas City, MO 64112	NONE	PC	the RooSTRONG Success Model	300,000
Total . . . . . ▶ **3a**				13,053,287

Form 990PF Part XV Line 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*				
United Inner City Services 2008 E 12th Street Kansas City, MO 64127	NONE	PC	start-up of the Metro Child and Family Development	37,500
United Way of Greater Kansas City 801 W 47th Street Kansas City, MO 641121239	NONE	PC	the organization's 100th anniversary in 2018 and t	25,000
United Way of Greater Kansas City 801 W 47th Street Kansas City, MO 641121239	NONE	PC	United Way's expansion of the Family Stability Ini	50,000
Total . . . . . ▶ **3a**				13,053,287

Form 990PF Part XV Line 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*				
Unleashed Pet Rescue & Adoption 5918 Broadmoor Street Mission, KS 662023226	NONE	PC	Bloch Family Matching Gift Program	5,000
Vaad Hakashruth of Kansas City 9900 Antioch Overland Park, KS 66212	JEWISH COMM ORG	PC	ongoing programs and operations	4,000
Veterans Community Project 8900 Troost Kansas City, MO 64131	NONE	PC	Bloch Family Matching Gift Program	5,000
Total . . . . . ▶ **3a**				13,053,287

Form 990PF Part XV Line 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*				
Village Shalom Inc5500 W 123rd Street Overland Park, KS 66209	JEWISH COMM ORG	PC	ongoing programs and operations	30,000
Wildwood Outdoor Education Center 1403 Southwest Blvd Kansas City, KS 66103	NONE	PC	the Commuity Engagement and Growth project.	35,000
Total . . . . . ▶ **3a**				13,053,287

efile GRAPHIC print - DO NOT PROCESS | As Filed Data - | DLN: 93491316019150

TY 2019 Accounting Fees Schedule

Name: Marion and Henry Bloch Family Foundation

EIN: 45-4047901

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING AND AUDIT FEES	73,683	28,854		22,105

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	DLN: 93491316019150

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2019 Depreciation Schedule

Name: Marion and Henry Bloch Family Foundation

EIN: 45-4047901

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	DLN: 93491316019150

TY 2019 Legal Fees Schedule

Name: Marion and Henry Bloch Family Foundation

EIN: 45-4047901

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	14,665	733		13,932

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	DLN: 93491316019150

TY 2019 Other Assets Schedule

Name: Marion and Henry Bloch Family Foundation

EIN: 45-4047901

Other Assets Schedule

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
DUE FROM FIR TREE INTL	10,854	2,424,110	2,424,110
DUE FROM FIR TREE II	9,043	204,688	204,688

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TY 2019 Other Expenses Schedule

Name: Marion and Henry Bloch Family Foundation

EIN: 45-4047901

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INFORMATION TECHNOLOGY	16,834			16,834
SPECIAL EVENT EXPENSES	2,125	106		2,019
INSURANCE	7,133			
MISCELLANEOUS	7,109			7,109

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	DLN: 93491316019150

TY 2019 Other Income Schedule

Name: Marion and Henry Bloch Family Foundation

EIN: 45-4047901

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Income (Loss) from Schedules K-1		877,390	
Unrealized Gain (Loss) on Investments	48,229,052		

TY 2019 Other Liabilities Schedule

Name: Marion and Henry Bloch Family Foundation

EIN: 45-4047901

Description	Beginning of Year - Book Value	End of Year - Book Value
DUE TO HRB MANAGEMENT	40,874	51,358

efile GRAPHIC print - DO NOT PROCESS | As Filed Data - | DLN: 93491316019150

TY 2019 Other Professional Fees Schedule

Name: Marion and Henry Bloch Family Foundation

EIN: 45-4047901

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT ADV. & SERVICE FEES	1,872,033	1,864,030		8,003
MANAGEMENT FEES	183,885	29,422		143,979
CONSULTING FEES	35,272			35,272

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	DLN: 93491316019150

TY 2019 Substantial Contributors Schedule

Name: Marion and Henry Bloch Family Foundation

EIN: 45-4047901

Name	Address
HENRY W BLOCH INTERIM TRUST	C/O COMMERCE BANK 118 W 47TH STRE KANSAS CITY, MO 64112

efile GRAPHIC print - DO NOT PROCESS | As Filed Data - | DLN: 93491316019150

TY 2019 Taxes Schedule

Name: Marion and Henry Bloch Family Foundation

EIN: 45-4047901

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAXES AND STATE TAXES	335,152			
FOREIGN TAXES	259	259		

efile GRAPHIC print - DO NOT PROCESS | As Filed Data - | DLN: 93491316019150

Schedule B (Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, 990-EZ, or 990-PF.
▶ Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047

2019

Name of the organization
Marion and Henry Bloch Family Foundation

Employer identification number
45-4047901

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 foundation

Check 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 other 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 990PF, 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	Employer identification number
Marion and Henry Bloch Family Foundation	45-4047901

Part I **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

Contributors

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	HENRY W BLOCH INTERIM TRUST C/O COMMERCE BANK 118 W 47TH STRE KANSAS CITY, MO 64112	$ 120,239,989	☑ Person ☐ Payroll ☑ Noncash (Complete Part II for noncash contributions.)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)

Name of organization
Marion and Henry Bloch Family Foundation

Employer identification number
45-4047901

Part II Noncash Property

(see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	VARIOUS STOCKS - SEE ATTACHED LIST	$ 120,239,989	2019-08-01
-		$	
-		$	
-		$	
-		$	
-		$	

Name of organization	Employer identification number
Marion and Henry Bloch Family Foundation	45-4047901

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

(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

(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

(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

FEDERAL FOOTNOTES

FORM 990-PF, PART VIII, LINE 1 AND 2, OFFICER COMPENSATION AND HIGHEST-PAID EMPLOYEES

THE FOUNDATION HAS NO EMPLOYEES. ALL MANAGEMENT SERVICES ARE PROVIDED THROUGH HRB MANAGEMENT, INC. WHO IS PAID A MANAGEMENT FEE AS DISCLOSED IN PART VIII, LINE 3, HIGHLY PAID CONTRACTORS. OFFICER DAVID P. MILES AND HIGHLY-COMPENSATED EMPLOYEES JEAN-PAUL CHAURAND AND RACHEL CARLTON ARE EMPLOYEES OF AND ARE PAID BY HRB MANAGEMENT, INC. PURSUANT TO THE FORM 990-PF INSTRUCTIONS, THE PORTION OF THE COMPENSATION PAID TO THE MANAGEMENT SERVICES COMPANY (HRB MANAGEMENT, INC.) THAT RELATES TO SERVICES PROVIDED BY THE FOUNDATION OFFICERS AND EMPLOYEES ARE REPORTED IN PART VIII, LINE 1, OFFICER COMPENSATION AND PART VIII, LINE 2, HIGHEST-PAID EMPLOYEES AS IF THE FOUNDATION HAD PAID THE OFFICERS AND EMPLOYEES DIRECTLY. THE TOTAL AMOUNT PAID TO HRB MANAGEMENT, INC. REPORTED IN PART VIII, LINE 3, HIGHLY PAID CONTRACTORS DOES NOT INCLUDE THE AMOUNT OF OFFICER AND HIGHEST-PAID EMPLOYEE COMPENSATION SEPARATELY REPORTED IN PART VIII, LINE 1, OFFICER COMPENSATION AND PART VIII, LINE 2, HIGHEST-PAID EMPLOYEES.

FEDERAL FOOTNOTES

FORM 990-PF, PART XVI-A

THE FOUNDATION FILES A FEDERAL FORM 990-T TO REPORT NET INCOME OR LOSS FROM UNRELATED BUSINESS INCOME RESULTING FROM INVESTMENTS IN VARIOUS PARTNERSHIPS. THE FOUNDATION ACCOUNTS FOR INVESTMENTS IN PARTNERSHIPS ON A GAAP BASIS, AND THEREFORE DOES NOT RECORD UNRELATED BUSINESS INCOME OR LOSS REPORTED ON TAX SCHEDULE K-1 IN ITS BOOKS AND RECORDS. AS A RESULT, NO UNRELATED BUSINESS INCOME OR LOSS IS REPORTED ON FORM 990-PF PART I, COLUMN A, REVENUE AND EXPENSES PER BOOKS OR ON PART XVI-A, ANALYSIS OF INCOME-PRODUCING ACTIVITIES, COLUMNS (A) AND (B), UNRELATED BUSINESS INCOME.

Marion and Henry Bloch Family Foundation
FEIN: 45-4047901
Reporting Set-Asides under the Cash Distribution Test
Year Ended: 12/31/2019

Form 990-PF, Part XII, Line 3b - Reporting set-asides under the cash distribution test

1. The Marion and Henry Bloch Family Foundation is setting aside $1,250,000 in funds for approved contribution/grant agreement. The nature and purposes of the project for which the amounts are to be set aside are for renovations and additions to the UMKC Bloch Heritage Hall. The goals of the project are to:

a. Meet the future growth needs of the Bloch School.
b. Transform Bloch Heritage Hall into a 21st century learning environment.
c. Attract and retain students locally and regionally.
d. Strengthen the Bloch School's ability to recruit and retain top faculty.
e. Demonstrate the Bloch School's intention to be Kansas City's business school.
f. Create synergistic connection with Bloch Executive Hall.

2. The amounts set aside for the project described in item 1 will actually be paid with the 12- month period that ends no more than 60 months after the date of the set-aside.

3. The project will not be completed before the end of the above-referenced tax year (the year in which the set-aside was made). The project is set to be substantially completed by July 31, 2022.

4. The Marion and Henry Bloch Family Foundation was incorporated on December 15, 2011 as a nonprofit Missouri charitable organization. The Marion and Henry Bloch Family distributed in cash the start up period minimum amount as well as the full payment period minimum amounts in each taxable year of the Foundation's full payment period. To continue to grow the foundation's asset, the foundation makes qualifying distributions for undistributed income within the following year. The following are the distributable amounts under Section 4942(d) and the actual payments made for the past 5 years:

Date	Distributable Amount	Undistributable Amount	Date Paid	Actual Amount Distrib
12/31/2018	13,657,163	13,094,524	12/31/2019	13,633,483
12/31/2017	13,389,173	12,806,366	12/31/2018	13,369,005
12/31/2016	12,874,199	12,046,458	12/31/2017	12,629,265
12/31/2015	13,349,981	12,482,666	12/31/2016	12,874,199
12/31/2014	8,548,479	12,836,495	12/31/2015	13,349,981