

EXTENDED TO NOVEMBER 16, 2020

## 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](http://www.irs.gov/Form990PF) for instructions and the latest information.

For calendar year 2019 or tax year beginning

, and ending

Name of foundation		A Employer identification number		
FOULGER FAMILY FOUNDATION, INC.		47-1636720		
Number and street (or P O box number if mail is not delivered to street address)		Room/suite		
12435 PARK POTOMAC AVE., SUITE 200				
City or town, state or province, country, and ZIP or foreign postal code				
POTOMAC, MD 20854				
G Check all that apply:		<input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		
H Check type of organization:		<input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		
I Market value of all assets at end of year (from Part II, col. (c), line 16)		J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual  <input type="checkbox"/> Other (specify) _____		
\$ 3,911,623.		(Part I, column (d), must be on cash basis.)		
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
Revenue	1 Contributions, gifts, grants, etc., received	400,000.		
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B Interest on savings and temporary cash investments	52,849.	52,849.	STATEMENT 1
	3 Dividends and interest from securities			
	5a Gross rents			
	b Net rental income or (loss)			
	6a Net gain or (loss) from sale of assets not on line 10 Gross sales price for all assets on line 6a			
	7 Capital gain net income (from Part IV, line 2)		RECEIVED	
	8 Net short-term capital gain			
	9 Income modifications Gross sales less returns and allowances			
	10a Less Cost of goods sold		18 NOV 2020	CSC
	c Gross profit or (loss)			
	11 Other income			
12 Total. Add lines 1 through 11	452,849.	52,849.	0.	0.
13 Compensation of officers, directors, trustees, etc		0.	0.	0.
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees		STMT 2	22,725.	11,363.
b Accounting fees				0.
c Other professional fees				11,363.
17 Interest		STMT 3	216.	108.
18 Taxes				0.
19 Depreciation and depletion				108.
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses		STMT 4	1,206.	204.
24 Total operating and administrative expenses. Add lines 13 through 23			24,147.	11,675.
25 Contributions, gifts, grants paid			180,436.	
26 Total expenses and disbursements. Add lines 24 and 25			204,583.	11,675.
27 Subtract line 26 from line 12:			248,266.	
a Excess of revenue over expenses and disbursements				
b Net investment income (if negative, enter -0-)			41,174.	
c Adjusted net income (if negative, enter -0-)				0.

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing	39,704.	477,862.	477,862.
	2	Savings and temporary cash investments	3,616,113.	3,433,761.	3,433,761.
	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			
	b	Investments - corporate stock			
	c	Investments - corporate bonds			
Liabilities	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)	3,655,817.	3,911,623.	3,911,623.
	17	Accounts payable and accrued expenses		7,540.	
	18	Grants payable			
Net Assets or Fund Balances	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.	7,540.	
		Foundations that follow FASB ASC 958, check here ► <input type="checkbox"/>			
		and complete lines 24, 25, 29, and 30.			
	24	Net assets without donor restrictions			
	25	Net assets with donor restrictions			
		Foundations that do not follow FASB ASC 958, check here ► <input checked="" type="checkbox"/>			
		and complete lines 26 through 30.			
	26	Capital stock, trust principal, or current funds	0.	0.	
	27	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	28	Retained earnings, accumulated income, endowment, or other funds	3,655,817.	3,904,083.	
	29	Total net assets or fund balances	3,655,817.	3,904,083.	
	30	Total liabilities and net assets/fund balances	3,655,817.	3,911,623.	

## 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	3,655,817.
2	Enter amount from Part I, line 27a	2	248,266.
3	Other increases not included in line 2 (itemize) ►	3	0.
4	Add lines 1, 2, and 3	4	3,904,083.
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	3,904,083.

**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					
b	NONE				
c					
d					
e					
	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g))	
a					
b					
c					
d					
e					
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.				(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))	
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any			
a					
b					
c					
d					
e					
2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }			2	
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	

**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	209,722.	3,668,202.	.057173
2017	927,833.	4,167,365.	.222643
2016	335,760.	1,452,725.	.231124
2015	45,748.	4,594.	9.958206
2014	24,619.		

2 Total of line 1, column (d)

2 10.469146

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 2.093829

4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5

4 3,528,444.

5 Multiply line 4 by line 3

5 7,387,958.

6 Enter 1% of net investment income (1% of Part I, line 27b)

6 412.

7 Add lines 5 and 6

7 7,388,370.

8 Enter qualifying distributions from Part XII, line 4

8 192,112.

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 2b

c All other domestic foundations enter 2% of line 2b. 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-)

3 Add lines 1 and 2

4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)

5 **Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-

## 6 Credits/Payments:

a 2019 estimated tax payments and 2018 overpayment credited to 2019

b Exempt foreign organizations - tax withheld at source

c Tax paid with application for extension of time to file (Form 8868)

d Backup withholding erroneously withheld

6a	0.
6b	0.
6c	0.
6d	0.

7 Total credits and payments. Add lines 6a through 6d

8 Enter any **penalty** for underpayment of estimated tax. Check here  if Form 2220 is attached9 **Tax due.** If the total of lines 5 and 8 is more than line 7, enter amount owed SEE STATEMENT 510 **Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the amount overpaid11 Enter the amount of line 10 to be: **Credited to 2020 estimated tax** ►

Refunded ►

7	0.
8	7.
9	830.
10	
11	

**Part VII-A** Statements Regarding Activities

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?

Yes	No
1a	X
1b	X

b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition  
If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.

c Did the foundation file Form 1120-POL for this year?

d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:

1a	X
1b	
1c	X

1c	
2	X
3	
4a	
4b	

(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.

3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes

4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?

b If "Yes," has it filed a tax return on Form 990-T for this year?

5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?

If "Yes," attach the statement required by *General Instruction T*

6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:

2	X
3	X
4a	
4b	
5	X

6	X
7	X
8b	X
9	X
10	X

If "Yes," complete Part II, col. (c), and Part XV

8a Enter the states to which the foundation reports or with which it is registered. See instructions. ►

MD

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)

7	
8b	X
9	X
10	X

8b	X
9	X
10	X

If "Yes," attach explanation

9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2019 or the tax year beginning in 2019? See the instructions for Part XIV. If "Yes," complete Part XIV

10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses

STMT 6

Form 990-PF (2019)

## 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

12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions

13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► **N/A**

	Yes	No
11	X	
12	X	
13	X	

14 The books are in care of ► **CLAYTON F. FOULGER** Telephone no. ► **240-499-9600**  
Located at ► **12435 PARK POTOMAC AVE., SUITE 200, POTOMAC, MD** ZIP+4. ► **20854-6975**

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

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?

	Yes	No
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.

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  
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?

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.)  Yes  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.

► \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_

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.)  Yes  No

4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?

b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2019?  Yes  No

	Yes	No
1b		
1c	X	
2b		
3b		
4a	X	
4b	X	

Form 990-PF (2019)

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

5a During the year, did the foundation pay or incur any amount to:

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?
- (3) Provide a grant to an individual for travel, study, or other similar purposes?
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions
- (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  
 Yes  No  
 Yes  No  
 Yes  No  
 Yes  No

Yes	No

5b  X

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



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?

**SEE STATEMENT 10**

Yes  No

<input checked="" type="checkbox"/>	
-------------------------------------	--

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

<input type="checkbox"/>	
--------------------------	--

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

If "Yes" to 6b, file Form 8870.

Yes  No

N/A

<input type="checkbox"/>	
--------------------------	--

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?

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

<input type="checkbox"/>	
--------------------------	--

**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

Form 990-PF (2019)

**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	
	0.
2	
All other program-related investments. See instructions.	
3 N/A	
	0.
<b>Total. Add lines 1 through 3</b>	► 0.

Form 990-PF (2019)

**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	0.
b	Average of monthly cash balances	1b	3,582,177.
c	Fair market value of all other assets	1c	
d	<b>Total</b> (add lines 1a, b, and c)	1d	3,582,177.
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	3,582,177.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	53,733.
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	5	3,528,444.
6	<b>Minimum investment return.</b> Enter 5% of line 5	6	176,422.

**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	176,422.
2a	Tax on investment income for 2019 from Part VI, line 5	2a	823.
b	Income tax for 2019. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	823.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	175,599.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	175,599.
6	Deduction from distributable amount (see instructions)	6	0.
7	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	175,599.

**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	192,112.
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	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	4	192,112.
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	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	6	192,112.

**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				175,599.
2 Undistributed income, if any, as of the end of 2019			0.	
a Enter amount for 2018 only				
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2019				
a From 2014	24,619.			
b From 2015	45,518.			
c From 2016	263,124.			
d From 2017	719,465.			
e From 2018	26,528.			
f Total of lines 3a through e	1,079,254.			
4 Qualifying distributions for 2019 from Part XII, line 4: ► \$ 192,112.			0.	
a Applied to 2018, but not more than line 2a				
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				175,599.
e Remaining amount distributed out of corpus	16,513.			
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	1,095,767.			
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	24,619.			
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a	1,071,148.			
10 Analysis of line 9:				
a Excess from 2015	45,518.			
b Excess from 2016	263,124.			
c Excess from 2017	719,465.			
d Excess from 2018	26,528.			
e Excess from 2019	16,513.			

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

N/A

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

## 1 Information Regarding Foundation Managers:

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

SEE STATEMENT 11

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;

**EQUIL-GER FAMILY FOUNDATION MANAGER - 240-499-9600**

FOUGER FAMILY FOUNDATION MANAGER, 240 495 500  
12435 PARK POTOMAC AVE #200, POTOMAC, MD 20854

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

**SEE ATTACHMENT A**

**c. Any submission deadlines:**

See Attachment A

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

g Any restrictions or limitations:

## 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
<b>a Paid during the year</b>				
ASSOCIATION OF FREELANCE TEACHERS 12-A TIPANOVA ST., UNIT 8N SAINT PETERSBURG, RUSSIA 196135		NC	TO FURTHER EDUCATIONAL PROGRAMMING AT FOULGER SCHOOL.	140,000.
BRIGHAM YOUNG UNIVERSITY-IDAHO 525 S CENTER ST REXBURG, ID 83460		PC	SCHOLARSHIPS FOR EDUCATIONAL PURPOSES.	27,625.
UNIVERSITY OF SOUTH CAROLINA EDUCATIONAL FOUNDATION 1027 BARNWELL ST COLUMBIA, SC 29208		PC	SCHOLARSHIPS FOR EDUCATIONAL PURPOSES.	7,164.
UNIVERSITY OF UTAH 332 SOUTH 1400 EAST, SUITE 150 SALT LAKE CITY, UT 84112		PC	SCHOLARSHIPS FOR EDUCATIONAL PURPOSES.	5,647.
<b>Total</b>				► 3a 180,436.
<b>b Approved for future payment</b>				
NONE				
<b>Total</b>				► 3b 0.

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
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities					
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					
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.		52,849.	0.
13 Total Add line 12, columns (b), (d), and (e)					
(See worksheet in line 13 instructions to verify calculations.)					

## Relationship of Activities to the Accomplishment of Exempt Purposes



**Schedule B**

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

**Schedule of Contributors**

OMB No. 1545-0047

- Attach to Form 990, Form 990-EZ, or Form 990-PF.
- Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

**2019**

Name of the organization

Employer identification number

**FOULGER FAMILY FOUNDATION, INC.****47-1636720**

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

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

Form 990-PF

 501(c)(3) exempt private foundation 4947(a)(1) nonexempt charitable trust treated as a private foundation 501(c)(3) taxable private foundationCheck if your organization is covered by the **General Rule** or a **Special Rule**.

Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

**General Rule**

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

**Special Rules**

For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000, or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 exclusively for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.

For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions exclusively for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an exclusively religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions totaling \$5,000 or more during the year ► \$ \_\_\_\_\_

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

Name of organization

FOULGER FAMILY FOUNDATION, INC.

Employer identification number

47-1636720

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	SID W. FOULGER REVOCABLE TRUST  12435 PARK POTOMAC AVE., SUITE 200  POTOMAC, MD 20854	\$ 400,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )
			Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions )

Name of organization

FOULGER FAMILY FOUNDATION, INC.

Employer identification number

47-1636720

**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
		\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions )	(d) Date received
		\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions )	(d) Date received
		\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$ _____	_____

Name of organization

**Employer identification number**

FOULGER FAMILY FOUNDATION, INC.

47-1636720

### 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 info once) ► \$ \_\_\_\_\_  
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			
<hr/> <hr/> <hr/>			
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
<hr/> <hr/> <hr/>		<hr/> <hr/> <hr/>	
(a) No. from Part I			
(b) Purpose of gift (c) Use of gift (d) Description of how gift is held			
<hr/> <hr/> <hr/>			
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
<hr/> <hr/> <hr/>		<hr/> <hr/> <hr/>	
(a) No. from Part I			
(b) Purpose of gift (c) Use of gift (d) Description of how gift is held			
<hr/> <hr/> <hr/>			
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
<hr/> <hr/> <hr/>		<hr/> <hr/> <hr/>	
(a) No. from Part I			
(b) Purpose of gift (c) Use of gift (d) Description of how gift is held			
<hr/> <hr/> <hr/>			
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
<hr/> <hr/> <hr/>		<hr/> <hr/> <hr/>	

## 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
BANK INTEREST - CHARLES SCHWAB	52,849.	52,849.	0.
TOTAL TO PART I, LINE 3	52,849.	52,849.	0.

## FORM 990-PF ACCOUNTING FEES STATEMENT 2

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAX PREPARATION SERVICES	22,725.	11,363.	0.	11,363.
TO FORM 990-PF, PG 1, LN 16B	22,725.	11,363.	0.	11,363.

## FORM 990-PF TAXES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL TAXES	216.	108.	0.	108.
TO FORM 990-PF, PG 1, LN 18	216.	108.	0.	108.

## FORM 990-PF OTHER EXPENSES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
POSTAGE & SHIPPING	206.	104.	0.	104.
BANK SERVICE FEE	200.	-100.	0.	101.
TAXABLE EXPENDITURE	800.	0.	0.	0.
TO FORM 990-PF, PG 1, LN 23	1,206.	204.	0.	205.

## NAME OF CONTRIBUTOR

## ADDRESS

CLAYTON F. FOULGER

12435 PARK POTOMAC AVE., SUITE 200  
POTOMAC, MD 20854

BRYANT F. FOULGER

12435 PARK POTOMAC AVE., SUITE 200  
POTOMAC, MD 20854

MARGARET F. PRATT

12435 PARK POTOMAC AVE., SUITE 200  
POTOMAC, MD 20854

ANNE F. DAVIS

12435 PARK POTOMAC AVE., SUITE 200  
POTOMAC, MD 20854

SID &amp; MARY FOULGER FOUNDATION INC.

12435 PARK POTOMAC AVE., SUITE 200  
POTOMAC, MD 20854

SID W. FOULGER REVOCABLE TRUST

12435 PARK POTOMAC AVE., SUITE 200  
POTOMAC, MD 20854

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
CLAYTON F. FOULGER 12435 PARK POTOMAC AVE., #200 POTOMAC, MD 20854	TREASURER/DIRECTOR 1.00	0.	0.	0.
BRYANT F. FOULGER 12435 PARK POTOMAC AVE., #200 POTOMAC, MD 20854	SECRETARY/DIRECTOR 1.00	0.	0.	0.
ANNE F. DAVIS 12435 PARK POTOMAC AVE., #200 POTOMAC, MD 20854	PRESIDENT/CHAIR OF THE BOA 10.00	0.	0.	0.
AMY F. BARLOW 12435 PARK POTOMAC AVE., #200 POTOMAC, MD 20854	VICE PRESIDENT/DIRECTOR 1.00	0.	0.	0.
MARGARET F. PRATT 12435 PARK POTOMAC AVE., #200 POTOMAC, MD 20854	VICE PRESIDENT/DIRECTOR 1.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		0.	0.	0.

FORM 990-PF

EXPENDITURE RESPONSIBILITY STATEMENT  
PART VII-B, LINE 5C

STATEMENT 10

## GRANTEE'S NAME

ASSOCIATION OF FREELANCE TEACHERS

## GRANTEE'S ADDRESS

12-A TIPANOVA ST., UNIT 8N  
SAINT PETERSBURG, RUSSIA, 196135

GRANT AMOUNT	DATE OF GRANT	AMOUNT EXPENDED
35,000.	01/03/19	35,000.

## PURPOSE OF GRANT

TO FURTHER EDUCATIONAL PROGRAMMING AT FOULGER SCHOOL. THE FOUNDATION RECEIVES QUARTERLY REPORTS DETAILING THE SOURCES AND USES OF THE SCHOOL'S FUNDING.

## DATES OF REPORTS BY GRANTEE

SEE STATEMENT 13.

## RESULTS OF VERIFICATION

N/A

## GRANTEE'S NAME

ASSOCIATION OF FREELANCE TEACHERS.

## GRANTEE'S ADDRESS

12-A TIPANOVA ST., UNIT 8N  
SAINT PETERSBURG, RUSSIA, 196135

GRANT AMOUNT	DATE OF GRANT	AMOUNT EXPENDED
35,000.	05/02/19	35,000.

## PURPOSE OF GRANT

TO FURTHER EDUCATIONAL PROGRAMMING AT FOULGER SCHOOL. THE FOUNDATION RECEIVES QUARTERLY REPORTS DETAILING THE SOURCES AND USES OF THE SCHOOL'S FUNDING.

## DATES OF REPORTS BY GRANTEE

SEE STATEMENT 13.

## RESULTS OF VERIFICATION

N/A

## GRANTEE'S NAME

ASSOCIATION OF FREELANCE TEACHERS

## GRANTEE'S ADDRESS

12-A TIPANOVA ST., UNIT 8N  
SAINT PETERSBURG, RUSSIA, 196135

GRANT AMOUNT	DATE OF GRANT	AMOUNT EXPENDED
35,000.	07/15/19	35,000.

## PURPOSE OF GRANT

TO FURTHER EDUCATIONAL PROGRAMMING AT FOULGER SCHOOL. THE FOUNDATION RECEIVES QUARTERLY REPORTS DETAILING THE SOURCES AND USES OF THE SCHOOL'S FUNDING.

## DATES OF REPORTS BY GRANTEE

SEE STATEMENT 13.

## RESULTS OF VERIFICATION

N/A

## GRANTEE'S NAME

ASSOCIATION OF FREELANCE TEACHERS

## GRANTEE'S ADDRESS

12-A TIPANOVA ST., UNIT 8N  
SAINT PETERSBURG, RUSSIA, 196135

GRANT AMOUNT	DATE OF GRANT	AMOUNT EXPENDED
35,000.	10/17/19	35,000.

## PURPOSE OF GRANT

TO FURTHER EDUCATIONAL PROGRAMMING AT FOULGER SCHOOL. THE FOUNDATION RECEIVES QUARTERLY REPORTS DETAILING THE SOURCES AND USES OF THE SCHOOL'S FUNDING.

## DATES OF REPORTS BY GRANTEE

SEE STATEMENT 13.

## RESULTS OF VERIFICATION

N/A

FORM 990-PF

PART XV -- LINE 1A  
LIST OF FOUNDATION MANAGERS

STATEMENT 11

## NAME OF MANAGER

CLAYTON F. FOULGER  
BRYANT F. FOULGER  
ANNE F. DAVIS  
MARGARET F. PRATT

## GENERAL EXPLANATION

STATEMENT 12

## FORM/LINE IDENTIFIER AND DESCRIPTION/RETURN REFERENCE

FORM 990-PF, PART VII-B, LINE 5A(3) - GRANT TO INDIVIDUAL FOR STUDY

## EXPLANATION:

THE FOULGER FAMILY FOUNDATION, INC. HAS REQUESTED AND RECEIVED APPROVAL VIA SCHEDULE H OF FORM 1023 TO GRANT SCHOLARSHIPS TO INDIVIDUALS. THE SCHOLARSHIPS ARE GRANTED AFTER A THOROUGH REVIEW OF THE APPLICATIONS THAT ARE RECEIVED BY THE FOUNDATION. THE FOUNDATION HAS ESTABLISHED A FRAMEWORK FOR AWARDING SCHOLARSHIPS ON A BASIS THAT IS BOTH OBJECTIVE AND NONDISCRIMINATORY. SEE ATTACHMENT A FOR A COPY OF THE SAMPLE SCHOLARSHIP APPLICATION THAT WAS INCLUDED WITH THE FORM 1023.

## GENERAL EXPLANATION

STATEMENT 13

## FORM/LINE IDENTIFIER AND DESCRIPTION/RETURN REFERENCE

FORM 990-PF, PART VII-B, LINE 5C - TREAS. REG. 53.4945-5(D)(2)(VI)

## EXPLANATION:

REPORTS WERE RECEIVED FROM THE GRANTEE ON THE FOLLOWING DATES:

APRIL 11, 2019  
JULY 4, 2019  
MARCH 12, 2020  
MARCH 21, 2020