

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 ESTHER M & FREEMAN E EVERETT CHARITABLE		A Employer identification number 52-7246146	
Number and street (or P.O. box number if mail is not delivered to street address) Room/suite 10 S DEARBORN IL1-0111		B Telephone number (see instructions) (800) 496-2583	
City or town, state or province, country, and ZIP or foreign postal code CHICAGO, IL 60603		C If exemption application is pending, check here <input type="checkbox"/>	
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		D 1. Foreign organizations, check here..... <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation ... <input type="checkbox"/>	
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		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ <u>2,951,302</u>		J Accounting method: <input type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)	
		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	

Part I Analysis of Revenue and Expenses <small>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)</small>		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	78,673	78,553		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	116,927			
	b Gross sales price for all assets on line 6a	952,622			
	7 Capital gain net income (from Part IV, line 2)		116,927		
	8 Net short-term capital gain			0	
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less: Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule)					
12 Total. Add lines 1 through 11	195,600	195,480			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	42,883	24,786		18,097
	14 Other employee salaries and wages		0	0	0
	15 Pension plans, employee benefits		0	0	0
	16a Legal fees (attach schedule)				0
	b Accounting fees (attach schedule)				0
	c Other professional fees (attach schedule)				0
	17 Interest				0
	18 Taxes (attach schedule) (see instructions)	6,530	1,265		0
	19 Depreciation (attach schedule) and depletion	0	0		0
	20 Occupancy				0
	21 Travel, conferences, and meetings			0	0
	22 Printing and publications			0	0
	23 Other expenses (attach schedule)				0
	24 Total operating and administrative expenses. Add lines 13 through 23	49,413	26,051	0	18,097
	25 Contributions, gifts, grants paid	179,405			179,405
26 Total expenses and disbursements. Add lines 24 and 25	228,818	26,051	0	197,502	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	-33,218				
b Net investment income (if negative, enter -0-)		169,429			
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. (See instructions.)		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing	13,798	16,479	16,479
	2 Savings and temporary cash investments	10,278	27,562	27,562
	3 Accounts receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____		0	0
	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 ▶ _____ 0			
	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)	1,536,697	1,403,441	1,705,331
	c Investments—corporate bonds (attach schedule)	961,893	1,036,697	1,059,721
	11 Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	137,680	143,318	142,209
	14 Land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
15 Other assets (describe ▶ _____)				
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	2,660,346	2,627,497	2,951,302	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶ _____)			
	23 Total liabilities (add lines 17 through 22)		0	
Net Assets or Fund Balances	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	2,660,346	2,627,497	
	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)	2,660,346	2,627,497		
30 Total liabilities and net assets/fund balances (see instructions) .	2,660,346	2,627,497		

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	2,660,346
2 Enter amount from Part I, line 27a	2	-33,218
3 Other increases not included in line 2 (itemize) ▶ _____	3	4,114
4 Add lines 1, 2, and 3	4	2,631,242
5 Decreases not included in line 2 (itemize) ▶ _____	5	3,745
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29 .	6	2,627,497

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					
(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	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
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					2 116,927
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	109,643	2,894,334	0.037882
2017	102,474	2,807,552	0.036499
2016	181,766	2,680,608	0.067808
2015	161,537	2,881,108	0.056068
2014	208,424	3,022,538	0.068957
2 Total of line 1, column (d)			2 0.267214
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 0.053443
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5			4 2,839,364
5 Multiply line 4 by line 3			5 151,744
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 1,694
7 Add lines 5 and 6			7 153,438
8 Enter qualifying distributions from Part XII, line 4			8 197,502

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 <input type="checkbox"/> 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 <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	1	1,694
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3	Add lines 1 and 2.	3	1,694
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	1,694
6	Credits/Payments:		
a	2019 estimated tax payments and 2018 overpayment credited to 2019	6a	3,180
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	0
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d.	7	3,180
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached.	8	0
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed ▶	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid ▶	10	1,486
11	Enter the amount of line 10 to be: Credited to 2020 estimated tax ▶ 1,486 Refunded ▶	11	0

Part VII-A Statements Regarding Activities

	Yes	No
1a		No
b		No
c		No
d		
e		
2		No
3		No
4a		No
b		
5		No
6	Yes	
7	Yes	
8a		
b	Yes	
9		No
10		No

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.		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		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ _____	Yes	

14 The books are in care of ▶ JP MORGAN CHASE BANK NA Telephone no. ▶ (800) 496-2583

Located at ▶ 10 S DEARBORN ST MC IL 1-0111 CHICAGO IL ZIP+4 ▶ 60603

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?	Yes	No
	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):		Yes	No
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(6) Agree to pay money or property to a government official? (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.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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 <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here. ▶ <input type="checkbox"/>	1b		No
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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions.)	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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 VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services. ▶		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	
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	2,831,634
b	Average of monthly cash balances.	1b	50,969
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	2,882,603
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	2,882,603
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	43,239
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,839,364
6	Minimum investment return. Enter 5% of line 5.	6	141,968

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	141,968
2a	Tax on investment income for 2019 from Part VI, line 5.	2a	1,694
b	Income tax for 2019. (This does not include the tax from Part VI.).	2b	
c	Add lines 2a and 2b.	2c	1,694
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	140,274
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	140,274
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	140,274

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	197,502
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	0
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	197,502
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	1,694
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	195,808

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				140,274
2 Undistributed income, if any, as of the end of 2019:				
a Enter amount for 2018 only.			0	
b Total for prior years: 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2019:				
a From 2014.	55,872			
b From 2015.	16,484			
c From 2016.	49,282			
d From 2017.	0			
e From 2018.	0			
f Total of lines 3a through e.	121,638			
4 Qualifying distributions for 2019 from Part XII, line 4: ▶ \$ _____ 197,502				
a Applied to 2018, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2019 distributable amount.				140,274
e Remaining amount distributed out of corpus	57,228			
5 Excess distributions carryover applied to 2019. (If an amount appears in column (d), the same amount must be shown in column (a).)				0
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	178,866			
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 instructions			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 (see instructions).	55,872			
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a	122,994			
10 Analysis of line 9:				
a Excess from 2015.	16,484			
b Excess from 2016.	49,282			
c Excess from 2017.	0			
d Excess from 2018.	0			
e Excess from 2019.	57,228			

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

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

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

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

	Tax year	Prior 3 years			(e) Total
	(a) 2019	(b) 2018	(c) 2017	(d) 2016	
b 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).)

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

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

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

a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed:
 PIKES PEAK COMMUNITY FOUNDATION
 730 N NEVADA AVE
 COLORADO SPRINGS, CO 80903
 (719) 389-1251

b The form in which applications should be submitted and information and materials they should include:
 WRITTEN REQUEST AND PROOF OF TAX EXEMPT STATUS UNDER IRC 501(C)(3)

c Any submission deadlines:
 NONE

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:
 MUST BE IN FURTHERANCE OF TAX EXEMPT PURPOSE

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> See Additional Data Table				
Total			▶ 3a	179,405
b <i>Approved for future payment</i>				
Total			▶ 3b	

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.)
. FHLMC			2019-01-17
402.856 ARTISAN INTL VAL-INST			2019-01-31
1109.562 CAPITAL GR NON US EQUITY		2013-08-05	2019-01-31
4142.988 DODGE & COX INCOME FUND			2019-01-31
2480.861 DOUBLELINE TTL RTRN BND-I		2016-03-02	2019-01-31
2871.48 JPM MULTI SECTOR INC FD - R6			2019-01-31
3738.52 PIMCO INVESTMENT GRADE CORPORATE BOND FUND			2019-01-31
2546.065 PIMCO INVESTMENT GRADE CORPORATE BOND FUND		2018-01-30	2019-01-31
120. SPDR TR UNIT SER 1		2012-11-16	2019-01-31
720. VANGUARD BD INDEX FD INC			2019-01-31

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
72			72
13,540		11,051	2,489
13,925		12,361	1,564
55,765		56,672	-907
25,925		26,917	-992
27,710		28,147	-437
37,834		38,348	-514
25,766		26,517	-751
32,390		16,345	16,045
56,915		56,266	649

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
			72
			2,489
			1,564
			-907
			-992
			-437
			-514
			-751
			16,045
			649

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.)
811.859 ARTISAN INTL VAL-INST		2012-08-06	2019-02-19
1974.844 MFS EMERG MRKTS DEBT-R5		2016-07-21	2019-02-19
184. JPMORGAN BETABUILDERS JAPAN ETF		2018-08-16	2019-03-05
946. JPMORGAN BETABUILDERS JAPAN ETF		2018-08-16	2019-03-05
115. SPDR TR UNIT SER 1		2012-11-16	2019-03-05
3815.064 BLCKRCK HI YLD BND PORT-K		2016-02-22	2019-03-06
. PFIZER INC			2019-04-03
833.066 ARTISAN INTL VAL-INST			2019-04-04
310. SPDR TR UNIT SER 1		2012-11-16	2019-04-04
4802.641 JPMORGAN CORE BOND FUND ULTRA		2017-04-12	2019-06-17

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
27,725		22,341	5,384
28,023		29,603	-1,580
4,155		4,348	-193
21,344		22,353	-1,009
32,085		15,664	16,421
28,651		26,362	2,289
136			136
29,316		24,239	5,077
89,021		42,224	46,797
56,383		55,806	577

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
			5,384
			-1,580
			-193
			-1,009
			16,421
			2,289
			136
			5,077
			46,797
			577

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.)
2506.649 BOSTON PART GL LG/SH EQ-INST		2018-11-14	2019-06-17
. AMGEN INC			2019-07-17
63. SPDR TR UNIT SER 1		2012-11-16	2019-07-17
38. ISHARES TR 7-10 YR TREAS INDEX FD		2019-02-20	2019-08-06
825.033 JPMORGAN CORE BOND FUND ULTRA		2017-04-12	2019-08-06
391.493 PIMCO INVESTMENT GRADE CORPORATE BOND FUND		2018-03-19	2019-08-06
803.856 VANGUARD TTL INTL BND-ADM		2017-04-19	2019-08-06
828. JPMORGAN BETABUILDERS EUROPE ETF		2018-08-16	2019-08-27
213. JPMORGAN BETABUILDERS EUROPE ETF		2018-08-16	2019-08-27
525. ISHARES TR BARCLAYS MBS BD FD		2019-01-31	2019-09-23

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
26,821		28,275	-1,454
18			18
18,756		8,581	10,175
4,253		3,975	278
9,884		9,587	297
4,236		3,999	237
18,762		17,492	1,270
18,878		19,797	-919
4,856		5,093	-237
56,769		55,388	1,381

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
			-1,454
			18
			10,175
			278
			297
			237
			1,270
			-919
			-237
			1,381

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.)
720. VANGUARD BD INDEX FD INC			2019-09-23
1605.33 CAPITAL GR NON US EQUITY		2013-08-05	2019-10-01
158.736 FIDELITY 500 INDEX-INST PRM		2018-02-07	2019-10-01
151. JPMORGAN BETABUILDERS JAPAN ETF		2018-08-16	2019-10-01
197.152 FIDELITY 500 INDEX-INST PRM		2018-02-07	2019-11-21
3348.888 EV GLBL MACR ABS RTRN-R6			2019-11-25
393.298 AMER FNDS INTL VNTG-F3		2013-08-05	2019-12-09
166. JPMORGAN BETABUILDERS JAPAN ETF		2018-08-16	2019-12-09
204. JPMORGAN BETABUILDERS EUROPE ETF		2018-08-16	2019-12-09
1206.631 SIX CIRCLES U.S. UNCONSTRAINED EQUITY FUND		2018-10-15	2019-12-09

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
58,090		56,823	1,267
22,459		17,883	4,576
16,294		14,899	1,395
3,567		3,568	-1
21,318		18,505	2,813
29,504		31,067	-1,563
5,852		4,381	1,471
4,192		3,922	270
5,033		4,878	155
13,285		12,018	1,267

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
			1,267
			4,576
			1,395
			-1
			2,813
			-1,563
			1,471
			270
			155
			1,267

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.)
CAPITAL GAIN DIVIDENDS	P		

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
			3,114

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

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

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
FIRST CONGREGATIONAL CHURCH 20 E ST VRAIN ST COLORADO SPRINGS, CO 80903	NONE	PC	GENERAL	4,000
OLYMPIC CITY USA CITY OF COLORADO SPRINGS 30 S NEVADA AVE MC 610 COLORADO SPRINGS, CO 80903	NONE	PC	GENERAL	1,000
FOSTERING HOPE FOUNDATION 3055 SUNNYBROOK LN COLORADO SPRINGS, CO 80904	NONE	PC	GENERAL	10,000
Total ▶ 3a				179,405

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
KIDPOWER OF COLORADO SPRINGS 10 BOULDER CRESCENT SUITE 100 COLORADO SPRINGS, CO 80903	NONE	PC	GENERAL	1,000
COURT CARE FOR THE PIKES PEAK REGIONPO BOX 68 COLORADO SPRINGS, CO 80901	NONE	PC	GENERAL	4,000
UNITED STATES OLYMPIC MUSEUM PO BOX 681 COLORADO SPRINGS, CO 80901	NONE	PC	GENERAL	20,000
Total ▶ 3a				179,405

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
PARKS RECREATION AND CULTURAL SVCS CITY OF COLORADO SPRINGS 1401 RECREATION WAY COLORADO SPRINGS, CO 80905	NONE	PC	GENERAL	5,000
CASA OF THE PIKES PEAK REGION 701 S CASCADE AVE COLORADO SPRINGS, CO 80903	NONE	PC	GENERAL	500
NATIONAL ALLIANCE ON MENTAL ILLNESS 510 E WILLAMETTE A COLORADO SPRINGS, CO 80903	NONE	PC	GENERAL	1,500
Total ▶ 3a				179,405

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
INDYGIVE235 S NEVADA AVE COLORADO SPRINGS, CO 80903	NONE	PC	GENERAL	6,500
STEWARDSHIP COUNSEL 121 S TEJON STREET SUITE 900 COLORADO SPRINGS, CO 80903	NONE	PC	GENERAL	55,500
PIKES PEAK UNITED WAY 518 NORTH NEVADA AVENUE COLORADO SPRINGS, CO 809031106	NONE	PC	GENERAL	10,000
Total ▶ 3a				179,405

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ARC PIKES PEAK REGION 10 N MEADE AVE COLORADO SPRINGS, CO 80909	NONE	PC	GENERAL	1,500
COLORADO NONPROFIT ASSOCIATION 723 N WEBER ST 200 COLORADO SPRINGS, CO 80903	NONE	PC	GENERAL	13,300
PIKES PEAK COMMUNITY FOUNDATION 730 N NEVADA AVE COLORADO SPRINGS, CO 80903	NONE	PC	GENERAL	25,605
Total ▶ 3a				179,405

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
GAZETTE CHARITIES 30 E PIKES PEAK AVE STE 100 COLORADO SPRINGS, CO 80903	NONE	PC	GENERAL	10,000
THE CENTER FOR APPLIED LEARNING AND LEAD FBO PIKES PEAK ACADEMY 5590 N NEVADA AVE COLORADO SPRINGS, CO 80918	NONE	PC	GENERAL	500
MERCY CORPS45 SW ANKENY STREET PORTLAND, OR 97204	NONE	PC	GENERAL	5,000
Total ▶ 3a				179,405

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
COMMUNITY PARTNERSHIP FOR CHILD DEVELOPMENT 2330 ROBINSON ST COLORADO SPRINGS, CO 80904	NONE	PC	GENERAL	500
ROCKY MOUNTAIN FIELD INSTITUTE 815 S 25TH ST STE 101 COLORADO SPRINGS, CO 80904	NONE	PC	GENERAL	4,000
Total ▶ 3a				179,405

TY 2019 Investments Corporate Bonds Schedule**Name:** ESTHER M & FREEMAN E EVERETT CHARITABLE**EIN:** 52-7246146**Investments Corporate Bonds Schedule**

Name of Bond	End of Year Book Value	End of Year Fair Market Value
256210105 DODGE & COX INCOME F		
258620103 DOUBLELINE TTL RTRN	56,721	56,409
48121L320 JPM UNCONSTRAINED DE		
4812C0100 JPM CORE BOND FD - U	196,275	202,400
552746364 MFS EMERGING MKTS DE		
92203J308 VANGUARD TOTAL INTL	387,251	398,955
722005816 PIMCO INVESTMENT GRA	51,955	56,190
808524870 SCHWAB U.S. TIPS ETF	29,302	30,863
921937827 VANGUARD SHORT-TERM		
54401E143 LORD ABBETT SHRT DUR	56,555	57,509
09260B614 BLACKROCK HIGH YIELD		
83002G108 SIX CIRCLES ULTRA SH	57,500	57,385
464287432 ISHARES 20+ YEAR TRE	59,008	56,224
464287440 ISHARES 7-10 YEAR TR	113,319	115,070
72201F490 PIMCO INCOME FD-INS	28,811	28,716

TY 2019 Investments Corporate Stock Schedule**Name:** ESTHER M & FREEMAN E EVERETT CHARITABLE**EIN:** 52-7246146**Investments Corporation Stock Schedule**

Name of Stock	End of Year Book Value	End of Year Fair Market Value
464287465 ISHARES MSCI EAFE ET	33,524	35,762
14042Y601 CAPITAL GR NON US EQ		
78462F103 SPDR S&P 500 ETF TRU	293,578	472,169
04314H857 ARTISAN INTL VALUE F		
46432F842 ISHARES CORE MSCI EA	85,104	90,357
315911750 FIDELITY 500 INDEX F	398,918	468,048
46641Q688 JPM BTABLDRS DEV ASI	29,719	30,703
46641Q696 JPMORGAN BETABUILDER	41,983	44,737
46641Q712 JPMORGAN BETABUILDER	81,415	84,737
46641Q720 JPMORGAN BETABUILDER	84,837	90,563
83002G306 SIX CIRCLES U.S. UNC	212,997	235,977
83002G405 SIX CIRCLES INTERNAT	114,122	116,843
14019V606 AMER FNDS INTL VNTG-	27,244	35,435

TY 2019 Investments - Other Schedule**Name:** ESTHER M & FREEMAN E EVERETT CHARITABLE**EIN:** 52-7246146**Investments Other Schedule 2**

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
12628J881 CRM LNG/SHRT OPPORT-	AT COST	28,233	28,559
09257V508 BLACKSTONE ALT MULTI	AT COST	85,788	85,147
27831R108 EATON VANCE GLOBAL M			
74925K466 BOSTON P GL LG/SH EQ			
09250J734 BLACKROCK EVNT DRVN	AT COST	29,297	28,503

TY 2019 Other Decreases Schedule**Name:** ESTHER M & FREEMAN E EVERETT CHARITABLE**EIN:** 52-7246146

Description	Amount
COST BASIS ADJUSTMENT	740
2019 TRANSACTIONS POSTED IN 2020	2,967
SALES BASIS ADJUSTMENT	38

TY 2019 Other Increases Schedule**Name:** ESTHER M & FREEMAN E EVERETT CHARITABLE**EIN:** 52-7246146

Description	Amount
2018 TRANSACTIONS POSTED IN 2019	4,114

TY 2019 Taxes Schedule**Name:** ESTHER M & FREEMAN E EVERETT CHARITABLE**EIN:** 52-7246146

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL TAX PAYMENT - PRIOR YE	2,085	0		0
FEDERAL ESTIMATES - INCOME	3,180	0		0
FOREIGN TAXES ON QUALIFIED FOR	1,071	1,071		0
FOREIGN TAXES ON NONQUALIFIED	194	194		0