

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

Name of foundation Columbus Memory Center and Health Education Founda		A Employer identification number 58-2580582	
Number and street (or P.O. box number if mail is not delivered to street address) 7409 Rolling Bend Ct		B Telephone number (see instructions)	
City or town, state or province, country, and ZIP or foreign postal code Columbus, GA 319041971		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) ▶ \$ 1,949,775		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (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) (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)				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	104	104	104	
	4 Dividends and interest from securities	32,378	32,378	32,378	
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a _____				
	7 Capital gain net income (from Part IV, line 2)				
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances _____				
Operating and Administrative Expenses	b Less: Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	1,879,033			
	12 Total. Add lines 1 through 11	1,911,515	32,482	32,482	
	13 Compensation of officers, directors, trustees, etc.	750,000			712,500
	14 Other employee salaries and wages	237,485			225,611
	15 Pension plans, employee benefits	156,197			147,697
	16a Legal fees (attach schedule)	11,762			5,881
	b Accounting fees (attach schedule)	15,035			
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)				
	19 Depreciation (attach schedule) and depletion	24,446			
	20 Occupancy	10,366			9,848
	21 Travel, conferences, and meetings	17,203			13,436
	22 Printing and publications				
	23 Other expenses (attach schedule)	459,164			439,135
	24 Total operating and administrative expenses. Add lines 13 through 23	1,681,658	0		1,554,108
	25 Contributions, gifts, grants paid	65,800			65,800
	26 Total expenses and disbursements. Add lines 24 and 25	1,747,458	0		1,619,908
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	164,057			
	b Net investment income (if negative, enter -0-)		32,482		
c Adjusted net income (if negative, enter -0-)				32,482	

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	262,840	94,111	94,111
	2 Savings and temporary cash investments	731,307	362,695	362,695
	3 Accounts receivable ▶ <u>22,152</u>			
	Less: allowance for doubtful accounts ▶ _____	7,626	22,152	22,152
	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	4,112		
	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)	708,000	1,375,014	1,375,014	
14 Land, buildings, and equipment: basis ▶ <u>149,082</u>				
Less: accumulated depreciation (attach schedule) ▶ <u>53,279</u>	87,745	95,803	95,803	
15 Other assets (describe ▶ _____)				
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	1,801,630	1,949,775	1,949,775	
Liabilities	17 Accounts payable and accrued expenses	121,041	105,129	
	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)	121,041	105,129	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ <input checked="" type="checkbox"/> and complete lines 24, 25, 29 and 30.			
	24 Net assets without donor restrictions	1,680,589	1,844,646	
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here ▶ <input type="checkbox"/> 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)	1,680,589	1,844,646	
30 Total liabilities and net assets/fund balances (see instructions) .	1,801,630	1,949,775		

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	1,680,589
2 Enter amount from Part I, line 27a	2	164,057
3 Other increases not included in line 2 (itemize) ▶ _____	3	
4 Add lines 1, 2, and 3	4	1,844,646
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	1,844,646

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			

(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) 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			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	2	
<div style="display: flex; justify-content: space-between;"> { If gain, also enter in Part I, line 7 { If (loss), enter -0- in Part I, line 7 </div>		
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):	3	
If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8		

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	1,955,670	1,270,482	1.539313
2017	1,978,094	519,454	3.808025
2016			
2015			
2014			

2 Total of line 1, column (d)	2	5.347339
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	1.069468
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	1,891,825
5 Multiply line 4 by line 3	5	2,023,246
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	325
7 Add lines 5 and 6	7	2,023,571
8 Enter qualifying distributions from Part XII, line 4	8	1,644,354

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 type="checkbox"/> and enter 1% of Part I, line 27b	1	650
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	650
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	650
6	Credits/Payments:		
a	2019 estimated tax payments and 2018 overpayment credited to 2019	6a	
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d.	7	
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> 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	650
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid ▶	10	
11	Enter the amount of line 10 to be: Credited to 2020 estimated tax ▶ 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?		No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition). <i>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.</i>		No
c Did the foundation file Form 1120-POL for this year?		No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ \$ _____ (2) On foundation managers. ▶ \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>		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? <i>If "Yes," attach a conformed copy of the changes</i>		No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		No
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? <i>If "Yes," attach the statement required by General Instruction T.</i>		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?	Yes	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	Yes	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ GA _____		
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? <i>If "No," attach explanation .</i>	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. <i>If "Yes," complete Part XIV</i>	Yes	
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>		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.	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? Website address ► _____	13	Yes	
14	The books are in care of ► Jonathan L Liss Telephone no. ► (706) 327-4000			

Located at ► 7409 Rolling Bend Ct Columbus GA

ZIP+4 ► 31904

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here	<input type="checkbox"/>		
	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?	16	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.**

		Yes	No
1a	During the year did the foundation (either directly or indirectly):		
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <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 checked="" type="checkbox"/> Yes <input 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	1b	No
	Organizations relying on a current notice regarding disaster assistance check here. <input type="checkbox"/>		
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 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))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2)	Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4)	Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.	<input checked="" type="checkbox"/>	
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? If "Yes," attach the statement required by Regulations section 53.4945–5(d).	<input type="checkbox"/> Yes <input type="checkbox"/> No	
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870.		6b No
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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
Piper A Gilley Employee	RN	57,784	7,415	0
10 Wolcester Ct Phenix City, AL 36870	40.00			

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

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services. ▶		

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 Clinical Medical Research - Statement 12	909,960
2 Cognitive Screening - Statement 13	267,880
3 Brain Health Education - Statement 14	387,720
4 Sponsorships to Promote Brain Health - Statement 15	54,348

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 NA	0
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	988,092
b	Average of monthly cash balances.	1b	932,543
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	1,920,635
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	1,920,635
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	28,810
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,891,825
6	Minimum investment return. Enter 5% of line 5.	6	94,591

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

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26.	1a	1,619,908
b	Program-related investments—total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	24,446
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	1,644,354
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	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	1,644,354

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				
2 Undistributed income, if any, as of the end of 2019:				
a Enter amount for 2018 only.				
b Total for prior years: 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2019:				
a From 2014. 956,905				
b From 2015. 1,189,723				
c From 2016. 1,567,623				
d From 2017. 1,978,094				
e From 2018. 1,955,690				
f Total of lines 3a through e.	7,648,035			
4 Qualifying distributions for 2019 from Part XII, line 4: ► \$ 1,644,354				
a Applied to 2018, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2019 distributable amount.				
e Remaining amount distributed out of corpus	1,644,354			
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	9,292,389			
b Prior years' undistributed income. Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b. Taxable amount—see instructions.				
e Undistributed income for 2018. Subtract line 4a from line 2a. Taxable amount—see instructions.				
f Undistributed income for 2019. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020.				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).				
8 Excess distributions carryover from 2014 not applied on line 5 or line 7 (see instructions).	956,905			
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a.	8,335,484			
10 Analysis of line 9:				
a Excess from 2015. 1,189,723				
b Excess from 2016. 1,567,623				
c Excess from 2017. 1,978,094				
d Excess from 2018. 1,955,690				
e Excess from 2019. 1,644,354				

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.	2002-03-07
b Check box to indicate whether the organization is a private operating foundation described in section <input checked="" type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 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	32,482	1,985	10		34,477
b 85% of line 2a	27,610	1,687	9		29,306
c Qualifying distributions from Part XII, line 4 for each year listed	1,644,354	1,955,690	1,978,094	1,578,777	7,156,915
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	1,644,354	1,955,690	1,978,094	1,578,777	7,156,915
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.	63,061	42,349	17,315	7,436	130,161
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	32,482	1,985	10		34,477

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

1	Information Regarding Foundation Managers:
a	List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).) None
b	List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest. None
2	Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:
Check here <input checked="" type="checkbox"/> if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions	
a	The name, address, and telephone number or email address of the person to whom applications should be addressed:
b	The form in which applications should be submitted and information and materials they should include:
c	Any submission deadlines:
d	Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

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

Recipient	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	65,800
b <i>Approved for future payment</i>				
Total			▶ 3b	0

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	
Enter gross amounts unless otherwise indicated.				
1 Program service revenue:				
a Research Income				1,879,033
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).				1,879,033
13 Total. Add line 12, columns (b), (d), and (e).				1,879,033

[illegible]

Part XVII

- | | | |
|---|-----------|-----------|
| 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. | | |

[illegible]

- 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 |
| | | |
| | | |
| | | |
| | | |
| | | |


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.

Sign Here <div style="border-bottom: 1px solid black; height: 20px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px;"></div>	<div style="border-bottom: 1px solid black; height: 20px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px;"></div>	<div style="border-bottom: 1px solid black; height: 20px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 20px;"></div>
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 <input type="checkbox"/>	PTIN
	James W Goodwin III CPA		2020-11-12		P00283301
	Firm's name ▶ Goodwin & Adams CPAs PC				Firm's EIN ▶ 84-4006559
	Firm's address ▶ 3238 University Avenue Columbus, GA 31907				Phone no. (706) 565-7374

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	Expense account, (e) other allowances
Jonathan L Liss 7409 Rolling Bend Ct Columbus, GA 31904	President and Treasurer 40.00	625,000	20,523	0
Lisa Liss Officer 7409 Rolling Bend Ct Columbus, GA 319041971				
David Silverman Trustee 66 9th St Hermosa Beach, CA 90254	Vice President and Secretary 40.00	125,000	37,000	0
Georges Kaado 928 Winthrop Dr Virginia Beach, VA 23452				
Bill Brock 3 Redmans Drive Oak Ridge, NJ 07438	Trustee 0.10	0	0	0
Hans Underbrink Trustee  1522 Harvard St Apt 3 Santa Monica, CA 90404				

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>				
Temple Israel1617 Wildwood Ave Columbus, GA 31906	None	PC	Help persons with neurological disease	10,400
Schwob School of Music900 Broadway Columbus, GA 31901	None	PC	Sponsorship of music program	30,000
Alzheimers Association5156 River Rd Columbus, GA 31904	Non	PC	Help persons with neurological diseases	20,900
Total ▶ 3a				65,800

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>				
Columbus Highschool Alumni Assoc 1301 1st Ave Columbus, GA 31901	None	PC	Support organization	500
Lakewood Baptist Church 4011 Lakewood Dr Phenix City, AL 36867	None	PC	Help persons with neurological diseases	4,000
Total ▶ 3a				65,800

TY 2019 Accounting Fees Schedule**Name:** Columbus Memory Center and Health Education Founda**EIN:** 58-2580582

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Accounting and Tax Preparation	15,035	0	0	0

TY 2019 Compensation Explanation

Name: Columbus Memory Center and Health Education Founda
EIN: 58-2580582

Person Name	Explanation
Hans Underbrink Trustee	Consultation

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

TY 2019 Depreciation Schedule

Name: Columbus Memory Center and Health Education Founda

EIN: 58-2580582

Depreciation Schedule

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
Table	2014-06-22	500	320	SL	7	71	0	0	
Storage Cabinet	2014-08-08	481	305	SL	7	69	0	0	
Patient Camera	2014-08-08	484	428	SL	5	56	0	0	
DVR	2015-03-17	966	724	SL	5	193	0	0	
Computer	2015-03-17	1,947	1,459	SL	5	389	0	0	
Headset	2015-10-05	943	614	SL	5	189	0	0	
Headset	2015-10-05	943	614	SL	5	189	0	0	
Monitor	2015-10-05	205	133	SL	5	41	0	0	
Ultrasound Machine	2015-10-08	5,168	3,360	SL	5	1,034	0	0	
Television	2016-01-08	1,554	933	SL	5	311	0	0	
IPAD	2016-03-10	583	331	SL	5	117	0	0	
Laptop	2016-07-08	1,166	583	SL	5	233	0	0	
Refrigerator	2016-08-08	578	280	SL	5	116	0	0	
Computer	2016-08-19	1,553	726	SL	5	311	0	0	
TENS Unit	2016-09-01	500	233	SL	5	100	0	0	
Computer	2016-11-30	1,214	506	SL	5	243	0	0	
Computer	2017-01-04	1,214	364	SL	5	243	0	0	
Refrigerator	2017-01-24	1,090	234	SL	7	156	0	0	
Office Chair	2017-01-24	5,051	1,083	SL	7	722	0	0	
Electronics	2017-02-05	3,909	1,173	SL	5	782	0	0	

Depreciation Schedule

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
Chairs	2017-03-08	2,146	460	SL	7	307	0	0	
Infusion Pump	2017-03-10	707	212	SL	5	141	0	0	
Chairs	2017-05-10	2,546	546	SL	7	364	0	0	
Sound System	2017-06-09	2,825	848	SL	5	565	0	0	
Golf Cart	2017-06-19	6,500	1,950	SL	5	1,300	0	0	
Photo Lighting	2017-07-05	501	150	SL	5	100	0	0	
Computer	2017-07-05	1,598	480	SL	5	320	0	0	
Server	2017-08-08	5,063	1,519	SL	5	1,013	0	0	
Computer	2017-08-25	882	264	SL	5	176	0	0	
Computer	2017-09-08	1,147	344	SL	5	229	0	0	
Receiver	2017-10-06	918	276	SL	5	184	0	0	
Furniture Adegbile	2017-10-09	7,300	1,564	SL	7	1,043	0	0	
Cameras	2017-11-02	3,576	1,073	SL	5	715	0	0	
Fumiture	2017-12-12	918	197	SL	7	131	0	0	
Wall Art	2018-01-10	2,663	190	SL	7	380	0	0	
Fumiture	2018-01-10	1,458	104	SL	7	208	0	0	
Carpets	2018-01-10	2,987	213	SL	7	427	0	0	
Exam Table	2018-01-10	1,554	155	SL	5	311	0	0	
Desks	2018-03-06	6,781	484	SL	7	969	0	0	
Van	2018-03-22	28,316	2,832	SL	5	5,663	0	0	

Depreciation Schedule

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
Desks	2018-03-30	1,595	114	SL	7	228	0	0	
Medical Equipment Foremost	2018-04-28	2,497	250	SL	5	499	0	0	
Computer	2018-05-03	2,051	205	SL	5	410	0	0	
Mac Notebook	2019-02-14	6,819	0	SL	5	682	0	0	
Desk	2019-02-22	708	0	SL	7	51	0	0	
Computer - ACOM	2019-02-22	1,024	0	SL	5	102	0	0	
Camera 3	2019-03-03	1,516	0	SL	5	152	0	0	
Computer - ACOM	2019-03-03	1,028	0	SL	5	103	0	0	
Refrigerator	2019-03-20	1,169	0	SL	7	84	0	0	
Camera	2019-11-27	1,127	0	SL	5	113	0	0	
Computer	2019-11-27	6,933	0	SL	5	693	0	0	
IPad	2019-01-27	968	0	SL	5	97	0	0	
IPad	2019-01-27	939	0	SL	5	94	0	0	
Camera	2019-02-15	1,127	0	SL	5	113	0	0	
Computer	2019-02-15	6,933	0	SL	5	693	0	0	
Amplifier	2019-12-31	2,213	0	SL	5	221	0	0	

TY 2019 Investments - Other Schedule

Name: Columbus Memory Center and Health Education Founda

EIN: 58-2580582

Investments Other Schedule 2

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
Fixed Income CDs		1,375,014	1,375,014

**TY 2019 Land, Etc.
Schedule****Name:** Columbus Memory Center and Health Education Founda**EIN:** 58-2580582

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
Furniture and Fixtures	35,134	10,550	24,584	24,584
Machinery and Equipment	113,948	42,729	71,219	71,219

TY 2019 Legal Fees Schedule**Name:** Columbus Memory Center and Health Education Founda**EIN:** 58-2580582

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Attorney Fees	11,762	0	0	5,881

TY 2019 Other Expenses Schedule**Name:** Columbus Memory Center and Health Education Founda**EIN:** 58-2580582**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Advertising	63,344	0	0	60,177
Bank Charges	60	0	0	0
Research costs	94,753	0	0	94,753
Computer Expense	5,560	0	0	5,282
Contract Labor	21,849	0	0	18,790
Dues Subscriptions	1,312	0	0	0
Licenses and permits	2,494	0	0	1,247
Education & Seminars	111	0	0	0
Insurance	16,921	0	0	16,074
Lab Expenses	196,062	0	0	196,062

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Medical Supplies	19,943	0	0	19,943
Office Expense	9,748	0	0	4,875
Office Supplies	15,476	0	0	14,702
Postage Expense	1,833	0	0	1,741
Repairs & Maintenance	5,985	0	0	2,993
Payroll Expenses	1,843	0	0	1,751
Storage	1,125	0	0	0
Uniforms	745	0	0	745

TY 2019 Other Income Schedule

Name: Columbus Memory Center and Health Education Founda

EIN: 58-2580582

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Research Income	1,879,033	0	0

FORM 990-PF	SUMMARY OF DIRECT CHARITABLE ACTIVITIES	STATEMENT 12
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ACTIVITY ONE**Clinical Medical Research**

Conduct and participate in clinical medical research and case studies for the purpose of advancing the prevention, treatment and elimination of disease. We are currently conducting FDA approved research, financially sponsored by international pharmaceutical companies. During 2019 we conducted 6 research trials including Alzheimer's and Dementia, AD prevention, and Mild Cognitive Impairment.

EXPENSES

TO FORM 990-PF, PART IX-A, LINE 1

909,960

FORM 990-PF	SUMMARY OF DIRECT CHARITABLE ACTIVITIES	STATEMENT 13
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ACTIVITY TWO**Cognitive Screening**

City and region-wide free cognitive screening. Every senior is eligible for a free cognitive test we call the Memory Number. In 2019 we screened about 3,700 people and distributed thousands of free booklets on memory loss and brain health

EXPENSES

TO FORM 990-PF, PART IX-A, LINE 2

267,880

FORM 990-PF	SUMMARY OF DIRECT CHARITABLE ACTIVITIES	STATEMENT 14
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ACTIVITY THREE**Brain Health Education**

In 2019 we conducted 10 "Ask the Memory Doctor" Town Halls. We traveled to and made presentations at area churches, civic organizations and retirement communities.

EXPENSES

TO FORM 990-PF, PART IX-A, LINE 3

387,720

FORM 990-PF	SUMMARY OF DIRECT CHARITABLE ACTIVITIES	STATEMENT 15
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ACTIVITY FOUR**Sponsorship and Participation with Organizations to Promote Brain Health**

Sponsored Columbus State University "Gusto" student scholarship fundraiser. Financially sponsored Alzheimer's Walk and Dancing Stars of Columbus. Participated in the local chapter board of advisors. Lectured state-wide representatives and co-hosted their major fundraiser. It is estimated that 80% of all referrals to the local chapter are made by Columbus Memory Center. Invited association representatives to speak at our public forums.

EXPENSES

TO FORM 990-PF, PART IX-A, LINE 4

54,348
