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 1545-0047 2019

Open to Public Inspection

			of the Treasury enue Service Go to www.irs.gov/Forn					Open to Public Inspection	
				and ending				-	
1		ne of fo				A Emplo	yer identification number		
1									
4			med Family Foundation				-6979041		
	_		street (or P O box number if mail is not delivered to street address)	Ro	om/suite		none number (see Instruction 5-794-7027	ns)	
			Green Acres Drive , state or province, country, and ZIP or foreign postal code			243	J- 194-1021	 /	' r.
	-		Lehem PA 18015			C If exer	nption application is pending	, check here ④ 🔲 🗸	X
				m of a former public ch	anty	D 1 Fo	reign organizations, check h	ere ④ 🗌	
	•	TICON C	Final return Amended	•			reign organizations meeting	_	
			Address change Name cha	ange			% test, check here and attach		
		back t	ype of organization X Section 501(c)(3) exempt private	e foundation /	VI	E If priva	ate foundation status was te	minated under	
٢				le private foundation	\mathcal{H}		507(b)(1)(A), check here	@ 	
			ket value of all assets at J Accounting method	X Cash Acc	rual	F If the f	foundation is in a 60-month	ermination	
			ear (from Part II, col (c), Other (specify)				section 507(b)(1)(B), check	~	
		e 16)	2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	be on cash basis)					
			Analysis of Revenue and Expenses (The total of	(a) Revenue and	(b) Net in	(estment	(c) Adjusted net	(d) Disbursements for chantable	
			amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))	expenses per books	(B) NET IN		income	purposes	
		-					-	(cash basis only)	
,		2	Contributions, gifts, grants, etc., received (attach schedule) Check King if the foundation is not required to attach Sch B		 			 i	
1		3	Interest on savings and temporary cash investments	11,400		11,400	11,400		
ιX		4	Dividends and interest from securities	193,246		93,246	193,246	RECEIVED	
۲,	i	5a	Gross rents			,		1	ıΩ
,	۸.	Ь	Net rental income or (loss)		1		12	IIIN 2 9 2020	S
	Ž	6a	Net gain or (loss) from sale of assets not on the 10 Stmt 1	1,216,890			۵	OON & COCO	RS-OSC
	Revenue	Ь	Gross sales price for all assets on line 6a 3,446,316			,			\simeq
	Se.	7	Capital gain net income (from Part IV, line 2)			11,416		OGDEN UT	
		8	Net short-term capital gain						—
		9	Income modifications						
		10a	Gross sales less returns and allowances					1	
		b	Less Cost of goods sold		ļ				
		С	Gross profit or (loss) (attach schedule)					<u> </u>	
		11	Other income (attach schedule)	1 101 505		16.060	004 646		
		12	Total. Add lines 1 through 11	1,421,536	2:	16,062	204,646	1	
	Expenses	13	Compensation of officers, directors, trustees, etc	0					
	ű	14	Other employee salanes and wages		ļ—	-			
	ğ.	15	Pension plans, employee benefits	6,413	-		6,413	-	
2021	Ш	16a	Legal fees (attach schedule) See Stmt 2	0,413	-		0,413		
~	trative	b	Accounting fees (attach schedule) Other professional fees (attach schedule) Stmt 3	19,298	 		19,298		
20	rat	17	Interest	15,250					
.3	iist	18	Taxes (attach schedule) (see instructions)				-		
3	Ę	19	Depreciation (attach schedule) and depletion					1	
)	Administ	20	Occupancy						
_		21	Travel, conferences, and meetings						
3	and	22	Printing and publications						
Ē		23	Other expenses (att. sch.)						
5	ij	24	Total operating and administrative expenses.]			_	
5	Operating		Add lines 13 through 23	25,711	 	<u> </u>	25,711	0	
)	Ö	25	Contributions, gifts, grants paid	1,050,000				1,050,000	
	-	26	Total expenses and disbursements. Add lines 24 and 25	1,075,711	ļ	0	25,711	1,050,000	
		27	Subtract line 26 from line 12	245 005					
		a	Excess of revenue over expenses and disbursements	345,825	-				
		b	Net investment income (if negative, enter -0-)		2	16,062	178,935		
	F		Adjusted net income (if negative, enter -0-)	L	L		1/0,935	Form 990-PF (2019)	
	ror	Paper	work Reduction Act Notice, see instructions.					rom 330°FF (2019)	

For Paperwork Reduction Act Notice, see instructions. DAA

Fo	m 990	PF (2019) Motamed Family Foundation	81-697904	1	Page 2
_			Beginning of year	End of	year
L	Part I	Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value
Т	1	Cash – non-interest-bearing			
-	2	Savings and temporary cash investments	333,962	169,955	169,955
	3	Accounts receivable ◆			
	-	Less allowance for doubtful accounts ◆			
	4	Pledges receivable ◆			
	7	Less allowance for doubtful accounts ◆		·	
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other			
	Ü	disqualified persons (attach schedule) (see			
	7	instructions)			•
ı	•	Other notes and loans receivable (att. schedule) Less allowance for doubtful accounts ◆ 0		·	
- 1	_				
윎	8	Inventories for sale or use	-		
Assets	9	Prepaid expenses and deferred charges			
٩	10a	Investments – U S and state government obligations (attach schedule) Investments – corporate stock (attach schedule) See Stmt 4	3,065,162	2,851,390	2,851,390
1	þ		3,003,102	2,651,590	2,031,390
1	С	Investments – corporate bonds (attach schedule)	 		
1	11	Investments – Land, buildargs, eind equipment. Lesis •			
1		Less accumulated deprecation (attach sch.) ◆			
1	12	Investments – mortgage loans	520 240	076 073	
1	13	Investments – other (attach schedule) See Statement 5	530,248	876,073	
1	14	Land, buildings, and equipment basis ◆			
1		Less accumulated depreciation (attach sch.) ◆			
1	15	Other assets (describe ◆)			
1	16	Total assets (to be completed by all filers – see the			
4		instructions Also, see page 1, item I)	3,929,372	3,897,418	3,021,345
1	17	Accounts payable and accrued expenses			
	18	Grants payable			<u>_</u>]
<u>S</u>	19	Deferred revenue			
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons			
ē	21	Mortgages and other notes payable (attach schedule)			
7	22	Other liabilities (describe ◆)			<u> </u>
┙	23	Total liabilities (add lines 17 through 22)	0	0	
		Foundations that follow FASB ASC 958, check here]
Balances		and complete lines 24, 25, 29, and 30.			1
틺	24	Net assets without donor restrictions			
줐	25	Net assets with donor restrictions			1
9		Foundations that do not follow FASB ASC 958, check here			Ì
되		and complete lines 26 through 30.			
Net Assets or F	26	Capital stock, trust principal, or current funds	3,399,124	3,021,345	
္စ	27	Paid-in or capital surplus, or land, bldg, and equipment fund			
힗	28	Retained earnings, accumulated income, endowment, or other funds	530,248	876,073	
ğ	29	Total net assets or fund balances (see instructions)	3,929,372	3,897,418	<u></u>
ᇷ	30	Total liabilities and net assets/fund balances (see			4
킼		instructions)	3,929,372	3,897,418	
╝	Part I	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	t agree with		
	end-c	of-year figure reported on pnor year's return)		1	3,929,372
2	Enter	amount from Part I, line 27a		2	345,825
3	Othe	r increases not included in line 2 (itemize) ◆		3	
4	Add I	ines 1, 2, and 3		4	4,275,197
		eases not included in line 2 (itemize) ◆ See Statement 6		5	377,779
6	Total	net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b)), line <u>29</u>	6	3,897,418
					Form 990-PF (2019)

Form 990-PF (2019) Motamed			81-6979041		Page 3
	d Losses for Tax on Investr		(h) How goowend	 	
(a) List and describe the 2-story brick ware	e kind(s) of property sold (for example, real estate house, or common stock, 200 shs MLC Co)	·	(b) How acquired P – Purchase D – Donation	(c) Date acq (mo , day,	
1a Bank of America		-			
b					
С					
е					
(e) Gross sales pnœ	(f) Deprecation allowed (or allowable)		t or other basis xpense of sale	(((h) Gain or (loss) e) plus (f) minus (g))
a 11,416					11,416
b					
С				ļ	
d					
e					
Complete only for assets showing	gain in column (h) and owned by the fo	undation on 12/31	/69	(I) Ga	ains (Col (h) gain minus
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69		coess of col (i) col (j), if any), but not less than -0-) or osses (from col (h))
a					11,416
b					
C					
d					
e					
2 Capital gain net income or (net cap	ortal loss) If gain, also enter in If (loss), enter -0- in		•	2	11,416
3. Net short-term capital gain or (loss	s) as defined in sections 1222(5) and (6	· -			
, , ,	column (c) See instructions If (loss), er	_			
Part I, line 8	column (c) cee maddalons ii (loco), c.		•	3	
	der Section 4940(e) for Redu	iced Tax on	Net Investment Ir	come	· · · · · · · · · · · · · · · · · · ·
	oundations subject to the section 4940				
			,		
f section 4940(d)(2) applies, leave this	s part blank				
Was the foundation liable for the section	on 4942 tax on the distributable amount	of any year in the	e base penod?		🗌 Yes 🗓 No
f "Yes," the foundation doesn't qualify	under section 4940(e) Do not complete	this part			
1 Enter the appropriate amount in ea	ach column for each year, see the instr	uctions before ma	king any entries		
(a)	(b)		(c)		(d)
Base penod years Calendar year (or tax year beginning in)	Advantad availed and distribution	s Net v	alue of nonchantable-use ass	ets	Distribution ratio (col (b) divided by col (c))
2018	200	,000	3,669,	292	0.054506
2017	220	,000	3,661,	062	0.060092
2016					
2015					
2014					
2 Total of line 1, column (d)				2	0.114598
	year base penod - divide the total on li	ne 2 by 5 0, or by			
	n has been in existence if less than 5 years			3	0.057299
·					
4 Enter the net value of nonchantab	le-use assets for 2019 from Part X, line	5		4	3,545,948
					<u></u>
5 Multiply line 4 by line 3				5	203,179
•					
6 Enter 1% of net investment income	e (1% of Part I, line 27b)			6	2,161
	•				
7 Add lines 5 and 6				7	205,340
· -					-
8 Enter qualifying distributions from I	Part XII, line 4			8	1,050,000
	line 7, check the box in Part VI, line 1b,	and complete tha	t part using a 1% tax ra	te See the	
Part VI instructions					
					Form 990-PF (2019

ΠΔΔ

5

	art VII Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e),	or 40	948 -	- See	instr		ns)	
	The state of the s			T			,	
1a	Date of ruling or determination letter 11/06/17 (attach copy of letter if necessary—see instruction	ne!	1				j	
_	-	, ,	1			2,:	161	
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here • X and enter 1% of Part I, line 27b		┝∸	 		<u>-,-</u>		
_			l				Į	
С	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of	_		l				
_	Part I, line 12, col (b) Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)		2	l			0	
2			3	 	_	2	<u>161</u>	
3	Add lines 1 and 2		4			<u>-</u> ,.	<u> </u>	
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)		5			2 -	161	
5	Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		ب	-		<u>-, -</u>		
6	Credits/Payments . 2019 estimated tax payments and 2018 overpayment credited to 2019 6a)	
a			ł)	
b			ł				}	
C			ł				l	
d	business with the second secon		7			 -		
7	Total credits and payments Add lines 6a through 6d		 '	-			82	
8	Enter any penalty for underpayment of estimated tax. Check here X if Form 2220 is attached	_	9	 		2 1	$\frac{32}{243}$	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	•	10			- 14		
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	. *	11				—	
11	Enter the amount of line 10 to be Credited to 2020 estimated tax ◆ Refunded		<u> </u>	1				
	Dunng the tax year, did the foundation attempt to influence any national, state, or local legislation or did it	-			1	Yes	No	
1a					1a	163	X	
	participate or intervene in any political campaign?				H	-	 -	
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the				1ь		x	
	instructions for the definition				10			•
	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				1c		X	
C	Did the foundation file Form 1120-POL for this year? Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year							
d	(1) On the foundation ◆ \$ (2) On foundation managers ◆ \$]	
_	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed		_					
е							{	
•	on foundation managers \$ Has the foundation engaged in any activities that have not previously been reported to the IRS?				2		X	
2					-		 -	
•	If "Yes," attach a detailed description of the activities Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles						{	
3	of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes				3		\mathbf{x}	
4-					4a		X	
4a				N/A	4b			
5	If "Yes," has it filed a tax return on Form 990-T for this year? Was there a liquidation, termination, dissolution, or substantial contraction during the year?			,	5		x	
3	If "Yes," attach the statement required by General Instruction T				H			
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either						{	
U								
	By language in the governing instrument, or Ruleton language that effects also appeared the governing instrument on that no mandatory directions that						ŀ	
	By state legislation that effectively amends the governing instrument so that no mandatory directions that and the law process in the coverning instrument?				6	X		
7	conflict with the state law remain in the governing instrument? Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), an	d Part	χv		7	X		
_		u i uii	~•		┝┷┪			
8a						l		
_	SC If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General						}	
b	(or designate) of each state as required by General Instruction G? If "No," attach explanation				8b	$\overline{\mathbf{x}}$		
					٣		1	/
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or				1		'—'	_
	4942(j)(5) for calendar year 2019 or the tax year beginning in 2019? See instructions for Part XIV If "Yes,"				9		х	\mathcal{O}
40	complete Part XIV				-		 -	•
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their				10		x	
	names and addresses				om 99		_	

Form	990-PF (2019) Motamed Family Foundation 81-69790	41				<u>Pa</u>	age 5
Pa	rt VII-A : Statements Regarding Activities (continued)						
						Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the						
	meaning of section 512(b)(13)? If "Yes," attach schedule See instructions				11		<u> </u>
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		<u> </u>
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption applic	ation?			13	X	
	Website address ♦ N/A			015 7	^4		_
14		ephone	no 🗣	215-7	94-	/02	,
	3347 Green Acres Drive			1001			
	Located at ◆ Bethlehem PA	Z	IP+4 ◆	18015)		. —
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 – check here		. I	ا ء			▼ ∐
	and enter the amount of tax-exempt interest received or accrued during the year		▼ L	15		V	- N-
16	At any time dunng calendar year 2019, did the foundation have an interest in or a signature or other authority				46	Yes	No X
	over a bank, secunities, or other financial account in a foreign country?				16		-
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of						
	the foreign country •	rod			L		<u>'</u>
Ра	rt VII-B Statements Regarding Activities for Which Form 4720 May Be Requi	reu			·	Yes	No
4-	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.				\vdash	163	-10
ıa	Dunng 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	X No	1		{
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a		103				
	disqualified person?		Yes	X No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	Н	Yes	X No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	П	Yes	X No			1
	(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	X No			ŀ
	(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 penod after			_			
	termination of government service, if terminating within 90 days)		Yes	X 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			N/A	1b		
	Organizations relying on a current notice regarding disaster assistance, check here			◆ 📙			ļ
C	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that			/-			اــا
	were not corrected before the first day of the tax year beginning in 2019?			N/A	1c		<u> </u>
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))						
а	At the end of tax year 2019, did the foundation have any undistributed income (Part XIII, lines		Vaa	X No			ĺ
	6d and 6e) for tax year(s) beginning before 2019?	Ш	Yes	X No			
	If "Yes," list the years ◆ 20 , 20 , 20 , 20 . An them say years listed in 2a fac which the foundation is not applying the provisions of section 4942(a)(2).						1
D	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) is a constant.						
	all years listed, answer "No" and attach statement – see instructions)	•		N/A	2b		
С	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here			,			<u> </u>
·	◆ 20 , 20 , 20 , 20						1
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise						1
	at any time during the year?		Yes	X 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 penod (or longer penod approved by the						
	Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse						}
	the 10-, 15-, or 20-year first phase holding period? (Use Form 4720, Schedule C, to determine if the			_			
	foundation had excess business holdings in 2019)			N/A	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its chantable purpose	es?			4a		Х
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize						ليدا
	chantable purpose that had not been removed from jeopardy before the first day of the tax year beginning in	2019?			4b		X
				F	om 99	10-PF	(2019)

Part VII-B! Statements Regarding Activities for Which Form 4720 May Be Required (continued) 5a Duning 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 chantable, etc, organization described in	Yes No
(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? Yes X No Yes X No	TES NO
(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? Yes X No	
directly or indirectly, any voter registration drive? (3) Provide a grant to an individual for travel, study, or other similar purposes? Yes X No Yes X No	
(3) Provide a grant to an individual for travel, study, or other similar purposes?	
(4) Provide a drant to an organization other than a charitable, etc. organization described in	1 1 1
35551511 15 15(4), (1), (1) 15 15 15 15 15 15 15 15 15 15 15 15 15	i I I
(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 X No	
b If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance? See instructions N/A 5b	<u></u> '
The second secon	
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	
× /× □ · · □ · · □ · · □ · ·	
Second it internal isotropically to the grant	
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?	
If "Yes" to 6b, file Form 8870	6b X
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? Yes X No	6b X
, , , , , , , , , , , , , , , , , , , ,	6b X
8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in	
	6b X
remuneration or excess parachute payment(s) duning the year?	
remuneration of excess paracriote payment(s) during the year?	7b
Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees,	7b
Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors	7b
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. See instructions.	7b oyees,
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. See instructions. (b) Title, and everage hours per week (If not paid. (e) Expense accomplete themselves their allowance of th	7b Oyees,
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. See instructions. (b) Title, and average bours per week (if not paid to employee benefit bours per week (if not paid to employee benefit (if not paid to employee benefit (iii) Expense according to excess paraction of excess paraction o	7b oyees,
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. See instructions. (b) Tritle, and everage hours per week fours pe	7b Oyees,
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Form 990-PF (2019) Motamed Family Foundation	81-6979041	Page 7
Part VIII Information About Officers, Directors, Truste and Contractors (continued)		Employees,
3 Five highest-paid independent contractors for professional servi	ices. 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		<u>V 1</u>
List the foundation's four largest direct charitable activities during the tax year Include relevant sta	atistical information such as the number of	
organizations and other beneficianes served, conferences convened, research papers produced,		Expenses
1 N/A		
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		Amount
1 N/A		
2		
All other program-related investments. See instructions		
3		
-		
	,	
Total. Add lines 1 through 3	>	000 PF
		Form 990-PF (2019)

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Pi	art X Minimum Investment Return (All domestic foundations must complete this part. Fo	reign	foundations,
	see instructions)		
1	Fair market value of assets not used (or held for use) directly in carrying out chantable, etc.		
	purposes		
а	Average monthly fair market value of securities	1a	3,076,367
b	Average of monthly cash balances	1b	523,580
С	Fair market value of all other assets (see instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	3,599,947
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation) 1e 0	J . I	
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	3,599,947
4	Cash deemed held for chantable activities Enter 11/2% of line 3 (for greater amount, see		
	instructions)	4	53,999
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	3,545,948
6	Minimum investment return. Enter 5% of line 5	6	177,297
Pa	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operations	ng fol	undations
	and certain foreign organizations, check here ◀ and do not complete this part.)		
1	Minimum investment return from Part X, line 6	1	177,297
2a	Tax on investment income for 2019 from Part VI, line 5] [
b	Income tax for 2019 (This does not include the tax from Part VI)		
C	Add lines 2a and 2b	2c	<u>2,161</u>
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	175,136
4	Recovenes of amounts treated as qualifying distributions	4	··
5	Add lines 3 and 4	5	175,136
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,	1	
	line 1	7	<u>175,136</u>
_ <u>Pa</u>	art XII Qualifying Distributions (see instructions)	,	
1	Amounts paid (including administrative expenses) to accomplish chantable, etc., purposes		
а	Expenses, contributions, gifts, etc. – total from Part I, column (d), line 26	1a	1,050,000
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 chantable, etc.,		
	purposes	2	
3	Amounts set aside for specific chantable projects that satisfy the	-	
а	Suitability test (pnor IRS approval required)	3a	
ь	Cash distribution test (attach the required schedule)	3b	1 050 000
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	1,050,000
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income	_	0 4 64
_	Enter 1% of Part I, line 27b See instructions	5	2,161
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,047,839
	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation	on	
	qualifies for the section 4940(e) reduction of tax in those years		

Form 990-PF (2019)

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	rt XIII Undistributed Income					
			(a)	(b)	(c)	(d)
1	Distributable amount for 2019 from Part >	a,	Corpus	Years pnor to 2018	2018	2019
	line 7					175,136
2	Undistributed income, if any, as of the end	d of 2019				
а	Enter amount for 2018 only					
b	Total for pnor years 20 , 20	, 20				
3	Excess distributions carryover, if any, to					j
а	From 2014				<i>‡</i>	
b	From 2015					
С	From 2016					
d	From 2017	41,592				
е	From 2018	21,524	·			. 1
ſ	Total of lines 3a through e		63,116	n		. 1
4	Qualifying distributions for 2019 from Part	t XII,				
	line 4 ◆ \$1,050,000					
а	Applied to 2018, but not more than line 2a	<u> </u>				
b	Applied to undistributed income of prior ye	ears				
	(Election required - see instructions)					1
С	Treated as distributions out of corpus (El	ection				
٠	required - see instructions)					
d	Applied to 2019 distributable amount					175,136
C	Remaining amount distributed out of corp	us	874,864	• •	f ,	
5	Excess distributions carryover applied to	2019	1			
	(If an amount appears in column (d), the s	same				
	amount must be shown in column (a))					
6	Enter the net total of each column as	s				
	indicated below:		0.11.000			
	Corpus Add lines 3f, 4c, and 4e Subtract		937,980			
þ	Pnor years' undistributed income Subtraction	ct				1
	line 4b from line 2b					<u> </u>
С	Enter the amount of prior years' undistribit	•				, [
	income for which a notice of deficiency ha					
	been issued, or on which the section 494	-2(a)				
	tax has been previously assessed	-				
a	Subtract line 6c from line 6b Taxable					
_	amount – see instructions Undistributed income for 2018 Subtract I	ine				i
-	4a from line 2a Taxable amount – see					
	instructions					1
f	Undistributed income for 2019 Subtract I	lines F				
•	4d and 5 from line 1 This amount must be]	
	distributed in 2020					0
7	Amounts treated as distributions out of co	orpus ,]
	to satisfy requirements imposed by section	· , ,			1	1
	170(b)(1)(F) or 4942(q)(3) (Election may	be			1	
	required—see instructions)					
8	Excess distributions carryover from 2014	not				1
	applied on line 5 or line $\bar{7}$ (see instruction	s)				<u> </u>
9	Excess distributions carryover to 20	20.			l , ,	'
	Subtract lines 7 and 8 from line 6a	L	937,980			
10	Analysis of line 9	,				
а	Excess from 2015			•		
b	Excess from 2016		9.4			
С	Excess from 2017	41,592	90			
d	Excess from 2018	21,524				
6	Excess from 2019	874,864	1		Ī	1 [

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	rt XIV Private Operating Fo			art VII-A, question	n 9)	
1a	If the foundation has received a ruling or					
	foundation, and the ruling is effective for	2019, enter the date of	f the ruling	•		
ь	Check box to indicate whether the foundation		-	ped in section 1	942(j)(3) or 494	2(j)(5)
2a		Tax year	1	Prior 3 years		
	income from Part I or the minimum	(a) 2019	(b) 2018	(c) 2017	(d) 2016	(e) Total
	investment return from Part X for		(-,	\-,'-,'	, -,	
	each year listed				 	·
b	85% of line 2a		 			
С	Qualifying distributions from Part XII,		İ			
_	line 4, for each year listed					
đ	Amounts included in line 2c not used directly					
	for active conduct of exempt activities			ļ. -		
е	Qualifying distributions made directly	`	k	1		
	for active conduct of exempt activities			ĺ		İ
_	Subtract line 2d from line 2c				· <u> </u>	<u> </u>
3	Complete 3a, b, or c for the					
	alternative test relied upon					
а	"Assets" alternative test - enter		1	<u> </u>		
	(1) Value of all assets				ļ <u>.</u>	<u> </u>
	(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				1	
	Part X, line 6, for each year listed	<u> </u>				
C	"Support" alternative test - enter	1				
	(1) Total support other than gross					
	investment income (interest,					
	dividends, rents, payments on					
	secunties loans (section				\	k
	512(a)(5)), or royalties) (2) Support from general public		 			$\overline{}$
	and 5 or more exempt				1	
	organizations as provided in			ļ		
	section 4942(j)(3)(B)(iii)					
	(3) Largest amount of support from					
	an exempt organization					
_	(4) Gross investment income					
Pa	rt XV Supplementary Inforr	nation (Complete	e this part only i	f the foundation	had \$5,000 or m	ore in assets at
	any time during the y	<u>/ear – see instru</u>	ctions.)			
1	Information Regarding Foundation	Managers:			-	
а	List any managers of the foundation who	have contributed more	than 2% of the total of	contributions received t	by the foundation	
	before the close of any tax year (but only	of they have contribute	ed more than \$5,000)	(See section 507(d)(2))	
	N/A					
b	List any managers of the foundation who	own 10% or more of t	he stock of a corporation	on (or an equally large	portion of the	
	ownership of a partnership or other entity) of which the foundati	on has a 10% or great	ter interest		
	N/A					
2	Information Regarding Contribution	Grant, Gift, Loan,	Scholarship, etc., P	rograms:		
	Check here • X if the foundation only				oes not accept	
	unsolicited requests for funds If the found					
	complete items 2a, b, c, and d See instru			· ·		
	The name, address, and telephone numb		the person to whom a	polications should be a	addressed	
_	N/A		, , , , , , , , , , , , , , , , , , ,	,		
	,					
	The form in which applications should be	submitted and informa	tion and materials they	should include		
	N/A	Submitted and informa	don and materials bicy	Should include		
- <u>-</u>	Any submission deadlines		 			
G	N/A					
		cuch as his accession	nal amae, chartable fo	ide kinde of institution	e or other	
d	Any restrictions or limitations on awards,	such as by geographic	oai areas, chantable fie	แนว, หมานร ชา เกรชนบุนิชิก	is, Or Other	
	factors N/A					
	11/12					

Part XV Supplementary Information (c 3 Grants and Contributions Paid During	ontinued) the Year or Approved f	or Future Payment		
Recipient	If recipient is an individual, show any relationship to any foundation manager	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	or substantial contributor	reapient	WI BIDGEST	
a Paid during the year Medical University of SC 18 Bee Street Charleston SC 29425	Hear	rt and Vascul	ar Center	1,000,000
The Gibbs Museum of Art 135 Meeting Street Charleston SC 29401		Gibbes Faci	lity Fund	25,000
Charleston Library Society 164 King Street Charleston SC 29401		Next Chapter	Campaign	25,000
Total b Approved for future payment N/A			→ 3a	1,050,000
Total			♦ 3b	

Part XVI-A	Analysis of Income-Producing Ac	tivities				
	ounts unless otherwise indicated	1	d business income	Excluded	by section 512, 513, or 514	(-)
•		(a) Business code	(b) Amount	(c) Exclusion	(d) Amount	(e) Related or exempt function income
1 Program se	rvice revenue			code		(See instructions)
-						
b						
				<u> </u>	_	
f						
g Fees ar	d contracts from government agencies			<u> </u>		
2 Membership	dues and assessments					
3 Interest on s	savings and temporary cash investments	<u></u>	<u> </u>	ļ		11,400
4 Dividends a	nd interest from securities			L		193,246
5 Net rental in	come or (loss) from real estate	L				
a Debt-fin	anced property					
b Not deb	t-financed property			ļ		
6 Net rental in	come or (loss) from personal property			ļ		
7 Other invest	ment income					
8 Gain or (los	s) from sales of assets other than inventory			↓		1,216,890
9 Net income	or (loss) from special events					
	or (loss) from sales of inventory					
11 Other reven	ue a		ļ	ļ.		
ь				<u> </u>		-
				1		
d			ļ	 		
e		<u> </u>	- 0	 	0	1 421 526
	d columns (b), (d), and (e)	L	1	1	<u> </u>	1,421,536 1,421,536
	line 12, columns (b), (d), and (e)				13	1,421,536
	in line 13 instructions to verify calculations) Relationship of Activities to the A	coomplish	mont of Evernt	Dumo		
Part XVI-B	Explain below how each activity for which income is					
Line No.	accomplishment of the foundation's exempt purpos					ns)
N/A	accomplishment of the loandaborts exempt perpet	ses (ester start	by providing lenes io	- 000 pc	poddo) (ddo <u></u>	,
			,			
					. , .	
					······	
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				_		

Form 990-I	PF (2019)	Motamed	Family	Foundati	on	81-69			Page 13
Part X	VII In	formation Reg	garding Tr	ansfers To ar	nd Transact	ions and Relation	onships With None	charitable I	Exempt
1 Did t			directly engage	e in any of the follo	wing with any o	ther organization desc	cnbed		Yes No
ın se	ction 501(•		organizations) or ii					
•	nizations?	4h	4-4 4			•			
	_	the reporting foun	dauon to a no	enchantable exemp	t organization of			1a(1)	x ´
• •	Cash							1a(1)	$\frac{x}{x}$
	Other asse							14(2)	- ^-
	r transact	ions ssets to a nonchar	stable avemat	omanization				1b(1)	l x
` '			•	exempt organization	\n			1b(2)	$\frac{x}{x}$
٠,		acilities, equipment		. •	,,,			1b(3)	$\frac{1}{x}$
• • •		ment arrangemen						1b(4)	X
		oan guarantees						1b(5)	X
		_	nembership o	r fundraising solicit	ations			1b(6)	X
			•	her assets, or paid				1c	X
	•		-	•		nn (b) should always :	show the fair market	<u> </u>	
		•					ed less than fair market		
							ets, or services received		
(a) Line		(b) Amount involved	 	of nonchantable exem		T	of transfers, transactions, and	sharing arrangeme	ents
N/A									
	i -								
		•							
						,			
				-					
			<u> </u>			<u> </u>			
		•	•	vith, or related to, or 501(c)(3)) or in so		exempt organizations	i	Ye	s 🗓 No
b If "Ye	es," comple	ete the following so	chedule	···					
		ame of organization		(b) Type of o	rganization		(c) Description of relations	nip	
N/A									
						 			
									
				L			d to the head of an head dades	and halled is a tau	
	Under penalti correct, and c	es of perjury, I declare complete Declaration of	that i have exami f preparer (other t	ned this return, includin han taxpayer) is based	g accompanying scr on all information of	iedules and statements, an I which preparer has any k	d to the best of my knowledge a nowledge		_
<u>.</u> .								e IRS discuss this re e preparer sho <u>wn b</u> el	
Sign			^	. ^					Yes No
Here	\sim	4	Ma	$\mathcal{D}_{\widehat{n}}$ ()	1.5	15/2020			
	1 1	romas 4	, 1"	reman	Para		Trustee Title		
		e of officer or trustee			Date		ride	 r	
	Pnnt/Type	preparer's name			Preparer's signat	ure			Check if
Paid	D 1	4 Tam-1-				~~	ļ		self-employed
Preparer		1. Lynch	C 77-	2 2/1	ETTC			P01454	101
Use Only	Firm's nam	e Moor		n Allen	PLLC		PTIN		
1	Firm's addi						Firm's EIN @	704-331	
		Cnar	lotte,	NC 28202			Phone no		0-PF (2019)
								Form 331	U-F F (2019)

· .		<u></u>		7.4	 	<u> </u>						 - ···	
			Net Iion Gaın / Loss	\$ 28,474	0 \$ 1,205,474		Charitable Purpose	w w		Charitable Purpose	о "		1-3
S	ets		se Depreciation	· γ·	\$ 0 %	Adjusted Net	6,413	nal Fees	Adjusted Net	19,298			
	1 - Form 990-PF, Part I, Line 6a - Sale of Assets	Whom Sold	Expense	32 \$	\$ 32	16a - Legal Fee	Vet stment	(A) (A)	Other Professio	Net Investment			
Federal Statements	F, Part I, Line (How Received	Cost	nase 1,020,432	\$ 2,	PF. Part I. Line	Vet Investment	w w	rt I, Line 16c -	N	\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \		
Federa		 	Sale Price	Purchase \$ 1,048,906 \$ Purchase 2,385,994	\$ 3,434,900	Statement 2 - Form 990-PF, Part I, Line 16a - Legal Fees	Total	\$ 6,413 \$ 6,413	- Form 990-PF, Part I, Line 16c - Other Professional Fees	Total	\$ 19,298 \$ 19,298		
ındatıon	<u>Statement</u>	٥	Date Sold	Acct. 020193527868 Various Various Acct. 020193527868 Various Various		Statemen			Statement 3 - F				
amed Family Fou		Description	Date Acquired	ca Acct. 020 Variou ca Acct. 020			Description	Allen PLLC		Description	America Mgmt. Fees al		
MOTAMED Motamed Family Foundation 81-6979041 FYE 12/31/2019			٠	Bank of America Bank of America	Total		Δ	Moore & Van A Total		۵	Bank of Ameri Total		

· <u>- 1</u>	·		
	Fair Market Value \$ 2,851,390 \$ 2,851,390	Fair Market Value	4-5
,	vestments Basis of Valuation Market	Basis of Valuation	•
ements	0b - Corporate Stock Inv End of Year \$ 2,851,390 \$ 2,851,390	End of Year S	
Federal Statements	Statement 4 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments Beginning of Year End of Year Basis conditions \$ 3,065,162 \$ 2,851,390 Market \$ 3,065,162 \$ 2,851,390	5 - Form 990-PF, Part II, Line 13 Beginning of Year \$ 530,248 \$ 530,248	
MOTAMED Motamed Family Foundation 81-6979041 FYE. 12/31/2019	Statement 4 - Form Description Bank of America Total	Statement 5 Description Retained earnings Total	

MOTAMED Motamed Family Foundation
8i-6979041 Federal Statements
FYE: 12/31/2019

Form 990-PF, Part III, Line 3 - Other Increases

Description Amount

Brokerage Assets
Total \$ 0

Statement 6 - Form 990-PF, Part III, Line 5 - Other Decreases

Description Amount

Decrease in market value \$ 377,779
Total \$ 377,779