923501 12-17-19 LHA For Paperwork Reduction Act Notice, see instructions.

Form . 990-PF

EXTENDED TO NOVEMBER 16, 20 Return of Private Foundation 2020

2949108613607 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. MAR 21, 2019 2019 For calendar year 2019 or tax year beginning , and ending Name of foundation A Employer identification number 84-1741277 BAKALA FOUNDATION USA Number and street (or P O box number if mail is not delivered to street address) B Telephone number 864-242-8204 200 EAST CAMPERDOWN WAY City or town, state or province, country, and ZIP or foreign postal code C If exemption application is pending, check here GREENVILLE. SC 29601 G Check all that apply X Initial return Initial return of a former public charity D 1. Foreign organizations, check here Final return Amended return 2. Foreign organizations meeting the 85% test, check here and attach computation Address change Name change X Section 501(c)(3) exempt private foundation H Check type of organization; If private foundation status was terminated Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation under section 507(b)(1)(A), check here I Fair market value of all assets at end of year | J Accounting method: If the foundation is in a 60-month termination (from Part II, col. (c), line 16) Other (specify) under section 507(b)(1)(B), check here 15, 585, 399. (Part I, column (d), must be on cash basis.) ▶\$ Part I Analysis of Revenue and Expenses (d) Disbursements for charitable purpose (cash basis only) (a) Revenue and (c) Adjusted net (b) Net investment (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) ) expenses per books 20,750,766 N/A Contributions, gifts, grants, etc., received 2 Chock I if the toundation is not required to attach son is 3 Interest on savings and temporary cash investments 2,572 2,572. 4 Dividends and interest from securities 5a Gross rents b Net rental income or (loss) 68 Net gain or (loss) from sale of assets not on line 10 b Gross sales price for all assets on line 6a 0. 7 Capital gain net income (from Part IV, line 2) 8 Net short-term capital gain Income modifications 10a Gross sales less returns and allowances b Less Cost of goods sold c Gross profit or (loss) 26,587. 0. STATEMENT 11 Other income 20,779,925. 2,572. Total, Add lines 1 through 11 0. 13 Compensation of officers, directors, trustees, etc. 14 Other employee salaries and wages 15 Pension plans, employee benefits 15 Periston plans, employee benefits
16a Legal fees
b Accounting fees
c Other professional fees
17 Interest
18 Taxes
19 Depreciation and depletion
20 Occupancy
21 Travel, conferences, and meetings 1,004. STMT 2 1,004 CEIVE OGDEN 22 Printing and publications 23 Other expenses
24 Total operating
expenses. Add
25 Contributions, o STMT 3 384. 0. 0. 24 Total operating and administrative <u>1,3</u>88. 0. 1,004. expenses. Add lines 13 through 23 400,000. 400,000. 25 Contributions, gifts, grants paid 26 Total expenses and disbursements. 401,388. 0. 401,004. Add lines 24 and 25 Subtract line 26 from line 12: 20,378,537 2 Excess of revenue over expenses and disbursements 2,572. b Net investment income (if negative, enter -0-) N/A c Adjusted net income (if negative enter -0-)

Form **990-PF** (2019)

Р	art	Balance Sheets Attached schedules and amounts in the description	Beginning of year	End (	of year
Lo	art	column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	Cash - non-interest-bearing		256,818.	256,818.
	,	Savings and temporary cash investments			
	1	Accounts receivable		<del></del>	
	"	Less allowance for doubtful accounts		<del></del>	
	١,	<del></del>			
	4	Pledges receivable -			
	ļ	Less allowance for doubtful accounts			-
	_	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other			
		disqualified persons			
	7	Other notes and loans receivable			
		Less allowance for doubtful accounts ►			
ŝ	8	Inventories for sale or use			
Assets	9	Prepaid expenses and deferred charges			
As	10a	Investments - U.S. and state government obligations			
	Ь	Investments - corporate stock			
	L	Investments - corporate bonds			
		Investments - land, buildings, and equipment basis			
	` `	Less accumulated depreciation	<del>*</del>	<u> </u>	
	12	Investments - mortgage loans			
		Investments - other STMT 5	0.	17,829,344.	15,328,581.
	14	Land, buildings, and equipment basis			1
	' 7	Less accumulated depreciation			
	45				
	ŀ	Other assets (describe	<del> </del>		
	16	Total assets (to be completed by all filers - see the	0.	19 096 162	15,585,399.
_	-	instructions. Also, see page 1, item I)		10,000,102.	13,,303,333.
	l	Accounts payable and accrued expenses			}
	18	Grants payable		<u></u>	
es	19	Deferred revenue			<del>                                     </del>
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons			<u> </u>
ä	1	Mortgages and other notes payable			
_	22	Other liabilities (describe		_	!
_	23	Total liabilities (add lines 17 through 22)	0.	0.	
		Foundations that follow FASB ASC 958, check here			
Ś		and complete lines 24, 25, 29, and 30.			
ž	24	Net assets without donor restrictions			]
alances	25	Net assets with donor restrictions			
9		Foundations that do not follow FASB ASC 958, check here 🕨 🗓			
Fund		and complete lines 26 through 30.			
ě	26	Capital stock, trust principal, or current funds	0.	0.	
	27	Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.	
Net Assets	28	Retained earnings, accumulated income, endowment, or other funds	0.	18,086,162.	
Ž	29	Total net assets or fund balances	0.	18,086,162.	į
ž					
	30	Total liabilities and net assets/fund balances	0.	18,086,162.	
P	art			· ·	
=			00	<u> </u>	<u> </u>
1		I net assets or fund balances at beginning of year - Part II, column (a), line	29		
_	•	st agree with end-of-year figure reported on prior year's return)		<u>  1</u>	20,378,537.
		r amount from Part I, line 27a		2	
		r increases not included in line 2 (itemize)		3	0.
		lines 1, 2, and 3	ann an	AMEMENT 4	20,378,537.
-		eases not included in line 2 (itemize)	• •	ATEMENT 4 5	2,292,375. 18,086,162.
<u>6</u>	i ota	net assets or fund balances at end of year (line 4 minus line 5) - Part II, co	numin (D), line 29	6	10,000,102.

BAKALA FOUNDATION USA

` (a) List and describe	the kind(s	) of property sold (for exar or common stock, 200 shs	npie, real esta		( <b>b</b> )	How ac - Purc - Dona	cquired hase ation	(c) Date acc (mo., day,	quired , yr.)	(d) Date sold (mo., day, yr.)
1a										
b NO	NE				_					
С					<u> </u>					
<u>d</u>		<del> </del>			<del> </del>					
<u>e</u>	ī				<u> </u>					
(e) Gross sales price	(f) [	Depreciation allowed (or allowable)		st or other basis expense of sale				(h) Gain ((e) plus (f	or (loss) ) minus (	
<u>a</u>										
<u>b</u>										
<u>C</u>				<del></del>						
_d	-									
<u>e</u>	L	1 /6\ 4 4 6 4	h - 4 d-A	10/01/00						
Complete only for assets shown	,		i i					l) Gams (Col. l. (k), but not		
(i) FMV as of 12/31/69	(	j) Adjusted basis as of 12/31/69		xcess of col. (i) r col. (j), if any				Losses (fr		
<u>a</u>	ļ									
<u>b</u>	ļ									
С										
<u>d</u>										
e	<u> </u>						ı		<u> </u>	
2 Capital gain net income or (net ca	apıtal loss)	If gain, also enter If (loss), enter -0	in Part I, line in Part I, line	e 7 e 7	}	2				
3 Net short-term capital gain or (lo	ss) as defu	•			_					
If gain, also enter in Part I, line 8	, column (d		u (0).		}	3				
Part V   Qualification U	nder S	ection 4940(e) for	Reduced	Tax on Net	Inve	stm	ent Inco	ome		
(For optional use by domestic private	e foundatio	ons subject to the section 4	940(a) tax or	net investment in	come	<u>.</u>				N/A
(i or optional use by domestic private	c roundatio	ms subject to the section 4	5 +0(a) tax 01			-,				,
If section 4940(d)(2) applies, leave t	his part bla	ank.								
Was the foundation liable for the sec	tion 4942	tax on the distributable am	ount of any v	ear in the base ner	nod?					Yes No
If "Yes," the foundation doesn't quali										
1 Enter the appropriate amount in					ntries					
(a)		(b)			(c)		-		DAb	(d)
Base periód years Calendar year (or tax year beginni	na in)	Adjusted qualifying dis	tributions	Net value of no			use assets	(co	Distrib ol. (b) div	ution ratio ided by col. (c))
2018	<u> </u>									· · · ·
2017	1						•			
2016	İ			-						
2015							_			
2014										
				•						
2 Total of line 1, column (d)								2		
3 Average distribution ratio for the	5-year bas	se period - divide the total of	on line 2 by 5	.0, or by the numb	er of	years				
the foundation has been in existe		•	•	, ,				3		
		,,,,,								
4 Enter the net value of noncharital	ble-use ass	sets for 2019 from Part X. I	ine 5					4		
		,	•							
5 Multiply line 4 by line 3								5		
o manapy mas v sy mas s										
6 Enter 1% of net investment incor	ne (1% of	Part I, line 27b)						6		
		·, ····· ~,								
7 Add lines 5 and 6								7		
8 Enter qualifying distributions from								8	<del></del>	
If line 8 is equal to or greater tha See the Part VI instructions.	n line 7, ch	neck the box in Part VI, line	1b, and com	plete that part usir	ng a 1	% tax ı	rate.			

Na Exempt operating foundations described in section 4940(5/(2), clack here	Form 990-PF (2019) BAKALA FOUNDATION USA Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or content of the section 4940(a), 4940(b), 4940(c), or content of the section 4940(a), 4940(b), 4940(b), 4940(c), or content of the section 4940(a), 4940(b), 4940(b), 4940(c), or content of the section 4940(a), 4940(b), 4940(		1741277 see instru		age 4
blomestic doundations that meet this section 4940(s) requirements in Part V, check here					<u>-</u>
b Domestic foundations hat meet the section 4940(e) requirements in Part V, check here		_			l
of Part I, line 27b		1			51.
c All other glomestic foundations either 2% of the 27b. Exempt foreign organizations, either 4% of Part I, line 12, cot. (b)  2					
2 Tax under section \$11 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) 3 Add lines 1 and 2 4 Subhit A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0- 5 Tax dar with application for extension of time to file (Form 8888) 6 D 6 Exempt foreign organizations -1 saw withheld at source 6 Tax paid with application for extension of time to file (Form 8888) 7 Total credits and payments. Add lines 5a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here if if Form 2200 is attached 9 Tax due. If the total of lines 3 is more than line 7, enter amount owed 10 Overpayment. If line 7 is more than the total of lines 3 is more than line 7, enter amount owed 10 Overpayment. If line 7 is more than the total of lines 3 from 4 in line 7, enter amount owed 10 Overpayment. If line 7 is more than the total of lines 3 from 6 in line 2 in l	•		·		
3 Add inses 1 and 2 4 Subtille A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0-) 5 Tax based on investment income. Subtract line 6 from 5		2			0.
S Tax based on investment income. Subtract tine 4 from line 3 if zero or less, enter-0- 6 Credist/Payments; a 2019 estimated tax payments and 2018 overpayment credited to 2019 b Exempl foreign organizations - Tax withheld at source 1 Tax pad with application for extension of time to the (Form 8888) 6 Backup withholding erroneously withheld 7 Total credits and payments. Add lines 5a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here in Form 2220 is attached 9 Tax due. If the Iodia of lines 5 and 8 is more than line 7, enter amount owed 10 Overayment. If line 7 is more than the total of lines 5 and 8, enter the amount owerpaid 11 Enter the amount of line 10 to be Credited to 2020 estimated tax. Plant the 11 of lines 1 and 10 to be Credited to 2020 estimated tax. Plant 1 is a mount of lines 10 to be Credited to 2020 estimated tax. Plant 1 is a mount of line 10 to be Credited to 2020 estimated tax. Plant 1 is a mount of lines 10 to be Credited to 2020 estimated tax. Plant 2 is a mount overpaid 11 Enter the amount of line 10 to be Credited to 2020 estimated tax. Plant 2 is a mount overpaid 11 Enter the amount of lines 10 to be Credited to 2020 estimated tax. Plant 2 is a mount overpaid 11 Enter the amount of line 10 to be Credited to 2020 estimated tax. Plant 2 is a mount overpaid 1 in the 10 to be Credited to 2020 estimated tax. Plant 2 is a mount overpaid 1 in the 10 to be Credited to 2020 estimated tax. Plant 2 is a mount overpaid 1 in the 10 to be Credited to 2020 estimated tax. Plant 2 is a mount overpaid 1 in the 10 to be Credited to 2020 estimated tax. Plant 2 is a mount overpaid 1 in the 10 to be Credited to 2020 estimated tax. Plant 2 is a mount overpaid 2 in the 10 to 2020 the 20		3			51.
6 Credits/Psyments: a 2019 estimated tax payments and 2018 overpayment credited to 2019 b Exempt foreign organizations - tax withheld at source c Tax pand with application for extension of time to file (Form 8868) 6 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	4			
6 Credits/Payments: a 2019 estimated tax payments and 2018 overpayment credited to 2019 b Exempt foreign organizations - tax withheld at source c Tax paid with application for extension of time to file (Form 8868) b C. d Backup withholding remoneusly withheld 7 Total credits and payments. Add lines 68 atthrough 66 0. 3 Tax die. If the total of lines 5 and 8 is more than file 7, enter amount owed 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Enter the amount of line (10 to 2 fredited to 2002 estimated tax 1, 149 -   Retunded by 11 1 0 1, 149 -   Part VIII-A   Statements Regarding Activities 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or infervene in any pollucal campaign? b Did it spend more than 5100 during the year (either directly or indirectly) for pollucal purposes? See the instructions for the definition if the answers 1'yes' to 1a or 1b, attach a detailed description of the activities. c Did the foundation the Form 1120-POL for this year? d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. It is 5 and 120 political proposes? See the instructions for the definition in the activities.  1 Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation or dispose on the activities.  2 Life the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation or dispose on the proposes of the complete of the iRS? If "Yes," attach a detailed description of the activities.  3 Has the foundation or magaged in any activities that have not previously been reported to the iRS?  4 Did the foundation dispose on the proposes of the year?  5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?  6 Are the requirements of section 5806 (victation to sections 494 through 4945) sat	5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-	5			51.
b Exempt foreign organizations - tax withheld at source  c Tax pard with application for extension of time to file (Form 8868)  d Backup withholding erroneously withheld  7 Total credits and payments. Add lines 8 at through 6d  8 Enter any penalty for underpayment of estimated tax. Check here I form 2220 is attached  9 Tax due. If the total of lines 5 and 8 is more than fine 7, enter amount owed  10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount owed  10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount owerpaid  11 Enter the amount of line 10 to be Credited to 2020 estimated tax. V  12 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?  b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition. If the answer is Yes' to 1a or 1b, attach a detailed description of the activities.  c Did the foundation flee form 1120-PLI for this year?  d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year.  (1) On the foundation in Place 1120-PLI for this year?  d Enter the rembursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. It is a fine attended to the section 500 (if any) or the activities and copies of any materials published or distributed by 11 Yes, attach a detailed description of the activities.  10 Line the rembursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. It is a fine attached to the line and the part of political expenditures (section 494 to 10					1
c Tax paid with application for extension of time to file (Form 8868) d Backup withholding erroneously withhold 7 Total credits and payments. Add files 68 through 6d 8 Enter any penalty for underpayment of estimated tax. Check here	a 2019 estimated tax payments and 2018 overpayment credited to 2019 6a 1, 20	10.			
8 Backup withholding erroneously withheld 7 Total credits and payments. Add lines 5 as through 6d 8 Enter any penalty for underpayment of estimated tax. Check here	b Exempt foreign organizations - tax withheld at source 6b				1
7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached 9 Tax due. If the total of lines 5 and 8 is more than his 67, enter amount owed 10 Overpayment. If line? 7 is more than his 10 ines 5 and 8, enter the amount overpaid 11 Enter the amount of line 10 to be: "Credited to 10 ines 5 and 8, enter the amount overpaid 12 Lines the amount of line 10 to be: "Credited to 10 ines 5 and 8, enter the amount overpaid 13 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any optical campaign?  b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition if the answer is "Yes" to 1 or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.  c Did the foundation file Form 1120-PDL for this year?  d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year.  (1) On the foundation. ▶ \$ O. (2) On foundation managers. ▶ \$ O.  e Enter the remibursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ O.  2 Has the foundation engaged in any activities that have not previously been reported to the IRS?  If Yes, "attach a detailed description of the activities  3 Has the foundation amonger of the activities  4 Did the foundation have intelled business gross income of \$1,000 or more during the year?  5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?  6 We the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:  9 By language in the governing instrument?  7 Did the foundation have made any exhalt the statement required by General Instruction G? If "No," attach explanation SEE STATEMENT 6	c Tax paid with application for extension of time to file (Form 8868)				1
8 Enter any penalty for underpayment of estimated tax. Check here	d Backup withholding erroneously withheld 6d 6d	0.			
9 Tax due. If the total of lines 5 and 8 is more than time 7, enter amount owed 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount owerpaid 11 Enter the amount of line 10 to be 'Credited to 2020 estimated tax ▶ 1, 149 • Refunded ▶ 11 0.    Part VII-A   Statements Regarding Activities 12 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any opitical campaign?  b Did it spend more than \$100 during the year (either directly) or indirectly) for political purposes? See the instructions for the definition If the answer is "Yes" to 1 a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.  c Did the foundation file Form 1120-POL for this year?  d Enter the amount (if any) paid by the foundation during the year (or 10) on the foundation. ▶ \$ 0. (2) On foundation managers. ▶ \$ 0. (2) On foundation managers. ▶ \$ 0. (2) On foundation managers. ▶ \$ 0. (3) On foundation managers. ▶ \$ 0. (4) On foundation managers. ▶ \$ 0. (4) On foundation managers. ▶ \$ 0. (5) On foundation managers. ▶ \$ 0. (6) On foundation managers. ▶ \$ 0. (7) On the foundation of the activities and the foundation managers. ▶ \$ 0. (8) On foundation managers. ▶ \$ 0. (9) On foundation managers. ▶ \$ 0. (10) On the foundation managers. ▶ \$ 0. (10) On the foundation managers. ▶ \$ 0. (10) On foundation managers. ▶ \$ 0. (10)	7 Total credits and payments. Add lines 6a through 6d	7		1,20	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid  11 Eiter the amount of line 10 to be "Credited to 2020 estimated tax	8 Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached	8			<u>0.</u>
Enter the amount of line 10 to be "Credited to 2020 estimated tax    1, 149. Refunded    1	•	9	ļ		
Part VII-A   Statements Regarding Activities  1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?  b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition If the answer is "See" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.  c Did the foundation file Form 1120-PDL for this year?  d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:  (1) On the foundation. ► \$ 0. (2) On foundation managers. ► \$ 0.  2 Has the foundation. ► \$ 0.  2 Has the foundation maped in any activities that have not previously been reported to the IRS?  If "Yes," attach a detailed description of the activities.  3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes  4 Bid the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of more during the year?  5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?  6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:  8 By language in the governing instrument, or  8 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, or  8 By language in the governing instrument, or  8 By tanguage in the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument, or  8 By tanguage i			ļ	1,14	
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?  b Did it spend more than \$100 during the year (either directly) or indirectly) for political purposes? See the instructions for the definition If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.  c Did the foundation file Form 1120-PDL for this year?  d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:  (1) On the foundation. ▶ \$ 0. (2) On foundation managers. ▶ \$ 0.  e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ 0.  2 Has the foundation engaged in any activities that have not previously been reported to the IRS?  If "Yes," attach a detailed description of the activities  3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a detailed description of the activities  3 Has the foundation have unrelated business gross income of \$1,000 or more during the year?  5 Was there a liquidation, termination, disosublion, or substantial contraction during the year?  5 Was there a liquidation, termination, disosublion, or substantial contraction during the year?  5 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:  8 By language in the governing instrument, or  8 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, or  8 By language in the governing instruction G? If "No," attach explanation  9 Is the foundation claiming status as a private operating foundation within the meaning of sec		11	<u> </u>		<u>0.</u>
any political campaign?  b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition if the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.  c Did the foundation file Form 1120-POL for this year?  d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:  (1) On the foundation. ► \$ 0. (2) On foundation managers. ► \$ 0.  E Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$ 0.  Has the foundation engaged in any activities that have not previously been reported to the IRS?  If "Yes," attach a detailed description of the activities  3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a detailed description of the activities  4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?  5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?  5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?  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, 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?  7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV  7 X  8a Ent	the second secon			TVool	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition if the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities. Did the foundation in connection with the activities. Did the foundation in Form 1120-P0L for this year?  d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:  (1) On the foundation. It is seen that the activities of incorporation of incorporation of the activities of incorporation of incorporation of the activities of incorporation of incorporat		rvene in	<u>                                   </u>	res	
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				<del>  _</del> _	X
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Forn	i 990-RF (20i9) BAKALA FOUNDATION USA 84-174	1277		Page 5
Pá	art VII-A Statements Regarding Activities (continued)			
$\overline{}$			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		X
· 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		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Х	
	Website address ► N/A			
14	The books are in care of ▶ THE FOUNDATION Telephone no. ▶ 864-2	42-8	204	
	Located at ▶ 200 EAST CAMPERDOWN WAY, GREENVILLE, SC ZIP+4 ▶2			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here		<u> </u>	• 🔲
	and enter the amount of tax-exempt interest received or accrued during the year	N	/A	
16	At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority over a bank,		Yes	No
	securities, or other financial account in a foreign country?	16		Х
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the			
	foreign country			
Pi	art 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
18	During the year, did the foundation (either directly or indirectly).			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? Yes X No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)			
	a disqualified person?			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes X 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)?			
	(6) Agree to pay money or property to a government official? (Exception. Check "No"			li
	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.)			
-	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations	<u> </u>		
	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			
	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		X
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))			
	At the end of tax year 2019, did the foundation have any undistributed income (Part XIII, lines			
	6d and 6e) for tax year(s) beginning before 2019? Yes X No			
	If "Yes," list the years <b>&gt;</b>			l
ı	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.)  N/A	2b		
	: If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here.			
	<b>&gt;</b>			
3	a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time			
	during the year? $igspace {f X}$ 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	1 .		1
	May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose			
	of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Form 4720,			<u> </u> _
	Schedule C, to determine if the foundation had excess business holdings in 2019.)  N/A	3b		
4:	a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		Х
	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		X
		orm <b>99</b> 0	0-PF	(2019)

Form **990-PF** (2019)

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

Form 990-PF (2019) BAKALA FOUNDATION USA	84-1/412// Page 7
Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)	
3 Five highest-paid independent contractors for professional services. If none, enter "NONE."	
(a) Name and address of each person paid more than \$50,000 (b) Type of servi	rice (c) Compensation
NONE	
<del></del>	
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	Evenence
number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1N/A	
2	
3	
4	
D. A.W. D. L.	
Part IX-B Summary of Program-Related Investments	A
Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
·	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	▶ 0.
	Form 990-PF (2019)

Page 8

Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.) Part X Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: 0. 1a a Average monthly fair market value of securities 136,827. 1b b Average of monthly cash balances 15,599,352. c Fair market value of all other assets 1c 15,736,179. d Total (add lines 1a, b, and c) 1d e Reduction claimed for blockage or other factors reported on lines 1a and 0. 1e 1c (attach detailed explanation) Acquisition indebtedness applicable to line 1 assets 2 736,179. 3 Subtract line 2 from line 1d 236,043. 4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) 15,500,136. Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 5 607,264. Minimum investment return, Enter 5% of line 5 ADJUSTED FOR SHORT TAX PERIOD 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.) 607,264. Minimum investment return from Part X, line 6 2a Tax on investment income for 2019 from Part VI, line 5 5.373. Income tax for 2019. (This does not include the tax from Part VI.) 5,424. Add lines 2a and 2b 2с 840. Distributable amount before adjustments. Subtract line 2c from line 1 3 0. 4 Recoveries of amounts treated as qualifying distributions 840. 5 Add lines 3 and 4 0. Deduction from distributable amount (see instructions) 6 601 840. Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 Part XII Qualifying Distributions (see instructions) Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes 401,004. a Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26 1a 0. 1b b Program-related investments - total from Part IX-B Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes 2 2 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 401.004. Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4 4 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b 6 401 004. Adjusted qualifying distributions. Subtract line 5 from line 4 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.

Form 990-PF (2019)

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,				601,840.
line 7				001,040.
2 Undistributed income, if any, as of the end of 2019			0.	
a Enter amount for 2018 only				
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2019:		0.		
a From 2014				
b From 2015				
¢ From 2016				
d From 2017				
e From 2018				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2019 from	•			i
Part XII, line 4: ►\$ 401,004.				
a Applied to 2018, but not more than line 2a			0.	
· · · · · · · · · · · · · · · · · · ·			•	
b Applied to undistributed income of prior		0.		
years (Election required - see instructions) c Treated as distributions out of corpus		0.		
	0.			
(Election required - see instructions)	<b>v.</b>			401,004.
d Applied to 2019 distributable amount	0.			101,001.
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below.				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income. Subtract				
line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable				
amount - see instructions		0.		
e Undistributed income for 2018. Subtract line				,
4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2019. Subtract				
lines 4d and 5 from line 1. This amount must				
be distributed in 2020				200,836.
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	0.		,	
9 Excess distributions carryover to 2020.	•			
Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9.				
a Excess from 2015				
b Excess from 2016				
c Excess from 2017				
d Excess from 2018				
e Excess from 2019		l	l	<u> </u>

Form 990-PF (2019) BAKALA	FOUNDATION !	USA		84-17	41277 Page 10
Part XIV Private Operating F	oundations (see ins	structions and Part VII-	A, question 9)	N/A	
1 a If the foundation has received a ruling	or determination letter that	it is a private operating			
foundation, and the ruling is effective fo	oc 2019, enter the date of t	he ruling	<b>•</b>	<u></u>	
b Check box to indicate whether the foun	dation is a private operatin	g foundation described in	n section	4942(j)(3) or 49	142(1)(5)
2 a Enter the lesser of the adjusted net	Tax year		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					
c Qualifying distributions from Part XII,					
line 4, for each year listed					
d Amounts included in line 2c not		1			
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	/	<b>1</b>			
(1) Value of all assets			<del>\</del>	<u> </u>	
(2) Value of assets qualifying			\		
under section 4942(j)(3)(B)(i)	<b>—</b> /				
b "Endowment" alternative test - enter 2/3 of minimum investment return					
shown in Part X, line 6, for each year	<i>Y</i>				
listed					
c "Support" alternative test - enter					
(1) Total support other than gross					
investment income (interest, dividends, pents, payments on					Į.
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 Info	ormation (Comple	te this part only it	the foundation	had \$5,000 or mo	re in assets
at any time during	the year-see instr	uctions.)			
1 Information Regarding Foundation	on Managers:				
a List any managers of the foundation w	-	than 2% of the total contr	butions received by the	foundation before the clos	e of any tax
year (but only if they have contributed	more than \$5,000). (See s	ection 507(d)(2) )	,		· - · <b>,</b> · · · · ·
NONE					
b List any managers of the foundation w	ho own 10% or more of the	e stock of a cornoration (	or an equally large portu	on of the ownership of a pa	rtnershin or
other entity) of which the foundation ha			or an equality large ports	on or the emileranip or a pe	a taloromp of
NONE	·				
	tion Grant Gift Loon	Sahalarchin ata Bre	oarame:		
			=	not accept unsolicited requ	ests for funds. If
the foundation makes gifts, grants, etc.	•	•	_		coto fur fulluo, fi
	·				
a The name, address, and telephone nun	iper or email address of th	e person to wnom applica	ations should be address	seu.	
SEE STATEMENT 9					
<b>b</b> The form in which applications should	be submitted and informat	tion and materials they sh	iould include.		
c Any submission deadlines:					
d Any restrictions or limitations on award	ds, such as by geographica	al areas, charitable fields,	kinds of institutions, or	other factors	

Part AV Supplementary information	(continued)		<u> </u>	
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	Purpose of grant or contribution	Amount
Name and address (home or business)	or substantial contributor	recipient	Contribution	
a Paid during the year				
DADEMOVIEW COLLEGE	N / N	PC	TUCK SCHOOL OF	
DARTMOUTH COLLEGE 6016 MCNUTT HALL	N/A		BUSINESS BUILDING FUND	
HANOVER, NH 03755			AND AN ENDOWED	
•			SCHOLARSHIP	400,000.
		,		
		<del>                                     </del>		
		İ		
Total			<b>▶</b> 3a	400,000.
b Approved for future payment				
*****				
NONE				
	<del>                                     </del>	<del>                                     </del>		<del></del>
			·	
Total			► 3b	0.

# Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.  1 Program service revenue:	(a) Business code	(b) Amount	(C) Exclu- sion code	(d) Amount	(e) Related or exempt function income
a					
b					<del></del>
c					
d	1 1				<u> </u>
<del></del>			$\vdash$		
e	-				
g Fees and contracts from government agencies					
g Fees and contracts from government agencies  2 Membership dues and assessments					
3 Interest on savings and temporary cash	-		H		
investments			14	2,572.	
4 Dividends and interest from securities				2,372.	
5 Net rental income or (loss) from real estate	-		<del>   </del>		
a Debt-financed property					
b Not debt-financed property			$\vdash$		
6 Net rental income or (loss) from personal					
property	531120	26,587.			
7 Other investment income	331120	20,307.			
8 Gain or (loss) from sales of assets other					
than inventory			$\vdash$		
9 Net income or (loss) from special events			$\vdash$		
10 Gross profit or (loss) from sales of inventory					
11 Other revenue					
<u> </u>	-				
b			<del>  </del>	<del></del>	<del></del>
<u> </u>					
d					
e		26,587.		2,572.	0.
12 Subtotal. Add columns (b), (d), and (e)		20,307.	1	13_	
13 Total. Add line 12, columns (b), (d), and (e)				13	23,133.
(See worksheet in line 13 instructions to verify calculations.)		<u> </u>			
Part XVI-B Relationship of Activities	to the Accomp	olishment of Exe	empt	Purposes	
Line No. Explain below how each activity for which inc	ome is reported in co	nlumn (e) of Part XVI-A	contrib	uted importantly to the accom	nlishment of
the foundation's exempt purposes (other than			CONTINU	oted importantly to the accom	phaintent of
- V	, с, р.с	, , , , , , , , , , , , , , , , , , ,			
	****			<del>-</del>	
				<del></del>	
· · · · · · · · · · · · · · · · · · ·					
		<del></del>			· <del>- ·</del>
				· <del></del>	
				<del>.</del>	
	<del></del>				
	<del></del>				
	·				

Part XVII	Information Re Exempt Organi		fers to a	nd Transactions ar	nd Relationsh	ips With Noncharit	able		_
1 Did the or	<u>-</u>		of the followin	g with any other organization	on described in secti	on 501(c)		Yes	No
				to political organizations?	,,, dobo.,,bob bob.,	S.			$\overline{}$
	from the reporting founda								
(1) Cash	• •						1a(1)		X
(2) Othe	r assets						1a(2)		X
<b>b</b> Other trai									
(1) Sales	s of assets to a noncharital	ble exempt organizati	on				1b(1)		<u>X</u>
(2) Purc	hases of assets from a nor	ncharitable exempt or	rganization				1b(2)		<u> </u>
( <b>3</b> ) Rent	al of facilities, equipment,	or other assets					1b(3)		<u>X</u>
	bursement arrangements						1b(4)		<u>X</u>
• •	s or loan guarantees						1b(5)		X
` '	ormance of services or me	•	-				1b(6)		<u>x</u>
-	of facilities, equipment, mai	•	•	•		market valve of the goods of	1c		
or service	•	oundation. If the foun	dation receive	• •	•	narket value of the goods, o or sharing arrangement, sh		cis,	
(a) Line no	(b) Amount involved	<del>,</del>		e exempt organization	(d) Description	of transfers, transactions, and sh	naring arra	ingemen	ts
12/	1-1	(5)	N/A	. F 9	(=,====,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	,	3 '	JJ.	
				,					
						•			
			_						
		·• ··· ·							
				<u> </u>					
				···	+				
		_			-	• • • • • • • • • • • • • • • • • • • •			
ın sectior	omplete the following sche	n 501(c)(3)) or in sec edule.		or more tax-exempt organi	•		Yes	X	] No
	(a) Name of org	anization		(b) Type of organization		(c) Description of relationsh	пр		
	N/A								
				-					
<del></del>									
Sign Here		plete Declaration of prep		accompanying schedules and si taxpayer) is based on all informa	ition of w	retu	the IRS on with the win below	prepare See ins	er
	Print/Type preparer's na		Preparer's s		Date	Check If PTIN			
			<u></u>	- Alama 2020 11 0	16 44 01 -05'00'	self- employed			
Paid	AMANDA ADA	MS	mand	- 7+xam 2020 110	7 10 44 01 -03 00		091		
Preparer	Firm's name ► CHE	RRY BEKAE	RT LLP		•	Firm's EIN ► 56-05			
Use Only									
				REET, SUITE	500				
	GR	EENVILLE,	SC 29	601		Phone no. 864-23			
						Fo	rm <b>99</b> 0	)-PF	(2019)

#### Schedule B

(Form 990, 990-EZ, or 990-PF)

Department of the Treasury Internal Revenue Service

## **Schedule of Contributors**

► Attach to Form 990, Form 990-EZ, or Form 990-PF.

Go to www.irs.gov/Form990 for the latest information.

OMB No 1545-0047

2019

Name of the organization Employer identification number BAKALA FOUNDATION USA 84-1741277 Organization type (check one) Filers of: Section: Form 990 or 990-EZ 501(c)( ) (enter number) organization 4947(a)(1) nonexempt charitable trust not treated as a private foundation 527 political organization Form 990-PF X 501(c)(3) exempt private foundation 4947(a)(1) nonexempt charitable trust treated as a private foundation 501(c)(3) taxable private foundation Check if your organization is covered by the General Rule or a Special Rule. Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions General Rule X For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributors Special Rules For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000, or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 exclusively for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions exclusively for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an exclusively religious, charitable, etc., purpose Don't complete any of the parts unless the General Rule applies to this organization because it received nonexclusively religious, charitable, etc., contributions totaling \$5,000 or more during the year Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it must answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to

LHA For Paperwork Reduction Act Notice, see the instructions for Form 990, 990-EZ, or 990-PF.

certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF)

Schedule B (Form 990, 990-EZ, or 990-PF) (2019)

Name of organization

Employer identification number

## BAKALA FOUNDATION USA

84-1741277

Part I	Contributors (see instructions) Use duplicate copies of Part I if additional	space is needed	
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	ZDENEK BAKALA  ROUTE DE GENEVE 18  NYON, SWITZERLAND 1260	s <u>20,750,766.</u>	Person Payroll Noncash X (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Oncash Complete Part II for noncash contributions )
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Oncash Complete Part II for noncash contributions )
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Oncash Occash (Complete Part II for noncash contributions )
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II for noncash contributions)

Name of organization

Employer identification number

## BAKALA FOUNDATION USA

84-1741277

Part II	Noncash Property (see instructions) Use duplicate copies of Part I	II if additional space is needed	
(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (See instructions )	(d) Date received
	DONATION OF INTEREST IN VR 2016 ABTP PORTFOLIO LP		
		_	
		\$9,849,995 <b>.</b>	05/31/19
(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
	DONATION OF INTEREST IN VR 2017 DUVH PORTFOLIO LP		
		—	
		s10,900,771.	05/31/19
(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		_	
		— [	
		\$	<del></del>
(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		_	
		_	
		\$	
(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		_	
<del></del>		_	
}		\$	
(a) No. from	(b)  Description of noncash property given	(c) FMV (or estimate)	(d) Date received
Part I		(See instructions )	
		<u>-</u>	
		_   <sub>e</sub>	
3453 11-06-		\$	990, 990-EZ, or 990-PF) (2

Name of or	ganization	Employer identification number					
BAKALA	A FOUNDATION USA			84-1741277			
Part III	Exclusively religious, charitable, etc., contributing from any one contributor. Complete columns (a completing Part III, enter the total of exclusively religious, Use duplicate copies of Part III if additional	) through (e) and the following line charitable, etc., contributions of \$1,000 charitable.	entry For organizations	that total more than \$1,000 for the year			
(a) No. from Part I	(b) Purpose of gift (c) Use of gift		(d) Des	(d) Description of how gift is held			
		(e) Transfer of g	 jift				
	Transferee's name, address, a	nd ZIP + 4	Relationship of tr	ansferor to transferee			
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) De	(d) Description of how gift is held			
	(e) Transfer of gift						
	Transferee's name, address, and ZIP + 4		Relationship of tr	Relationship of transferor to transferee			
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) De	(d) Description of how gift is held			
	(e) Transfer of gift						
	Transferee's name, address, a	Relationship of tr	ansferor to transferee				
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) De	(d) Description of how gift is held			
	(e) Transfer of gift						
-	Transferee's name, address, a	nd ZIP + 4	Relationship of transferor to transferee				

TOTAL TO FORM 990-PF, PART III, LINE 5

FORM 990-PF	OTHER I	NCOME		STATEMENT 1
DESCRIPTION		(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	
PASSTHROUGH K-1 INCOME		26,587.	0.	
TOTAL TO FORM 990-PF, PART I	, LINE 11	26,587.	0.	
FORM 990-PF	LEGAL	FEES		STATEMENT 2
DESCRIPTION		(B) NET INVEST- MENT INCOME	ADJUSTED	
GENERAL GOVERNANCE & COUNSEL	1,004.	0	•	1,004
TO FM 990-PF, PG 1, LN 16A	1,004.		•	1,004.
FORM 990-PF	OTHER E	XPENSES		STATEMENT 3
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	ADJUSTED	CHARITABLI
PASSTHROUGH DEDUCTIONS	384.	0	•	0
TO FORM 990-PF, PG 1, LN 23	384.	0	•	0.
FORM 990-PF OTHER DECREAS:	ES IN NET AS	SETS OR FUND	BALANCES	STATEMENT 4
DESCRIPTION			_	AMOUNT
TO ADJUST PARTNERSHIP BASIS '	TO TAX BASIS			2,292,375
	<b>_</b>		-	

2,292,375.

FORM 990-PF OT	OTHER INVESTMENTS		STATEMENT 5	
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE	
VR 2016 ABTP PORTFOLIO LP VR 2017 DUVH PORTFOLIO LP	COST	7,233,694. 10,595,650.	6,212,403. 9,116,178.	
TOTAL TO FORM 990-PF, PART II, LI	INE 13	17,829,344.	15,328,581.	

FORM 990-PF	EXPLANATION	CONCERNING	PART VII-A,	LINE 8B	STATEMENT 6
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### **EXPLANATION**

THE SC ATTORNEY GENERAL'S OFFICE DOES NOT REQUIRE THAT A COPY BE FILED WITH THEIR OFFICE. INSTEAD, THEY MAINTAIN THE RIGHT TO RECEIVE THE FILING IF THEY SO CHOOSE. THE FOUNDATION WILL COMPLY WITH ANY SUCH REQUEST AS APPLICABLE.

FORM 990-PF	LIST OF SUBSTANTIAL CONTRIBUTORS PART VII-A, LINE 10	STATEMENT 7	
NAME OF CONTRIBUTOR	ADDRESS		
ZDENEK BAKALA	ROUTE DE GENEVE 18 NYON, SWITZERLAND 1260		

	T OF OFFICERS, DIRECTORS STATEMENT 8 FOUNDATION MANAGERS			
NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
MARSHALL WINN 200 EAST CAMPERDOWN WAY GREENVILLE, SC 29601	PRESIDENT/DIRE 5.00	CTOR 0.	0.	0.
CRAIG H. COMSTOCK 200 EAST CAMPERDOWN WAY GREENVILLE, SC 29601	SECRETARY/TREA 5.00	SURER/DIREC' 0.	ror	0.
WILLIAM KEEN 200 EAST CAMPERDOWN WAY GREENVILLE, SC 29601	DIRECTOR 1.00	0.	0.	0.
ELEANOR W. NORDHOLM 200 EAST CAMPERDOWN WAY GREENVILLE, SC 29601	DIRECTOR 1.00	0.	0.	0.
JOHN R. WIGINGTON 200 EAST CAMPERDOWN WAY GREENVILLE, SC 29601	DIRECTOR 1.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6	5, PART VIII	0.	0.	0.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION PART XV, LINES 2A THROUGH 2D

STATEMENT 9

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

GRANTS ADMINISTRATION COMMITTEE, BAKALA FOUNDATION USA 200 EAST CAMPERDOWN WAY GREENVILLE, SC 29601

TELEPHONE NUMBER

NAME OF GRANT PROGRAM

864-242-8204

SCHOLARSHIP PROGRAM

#### FORM AND CONTENT OF APPLICATIONS

APPLICANTS FOR SCHOLARSHIP AWARDS SHALL BE REQUIRED TO SUBMIT SUCH APPLICATION FORMS AND SUPPORTING MATERIALS AS THE FOUNDATION MAY DEEM APPROPRIATE. THE SCHOLARSHIP APPLICATION, IN ADDITION TO COMPLETION OF THE FORM ITSELF, REQUESTS THE APPLICANT OBTAIN ONE LETTER OF RECOMMENDATION, WHICH WILL SPEAK TO THE APPLICANT'S ACADEMIC ACHIEVEMENTS AND PERFORMANCE, TO BE SENT DIRECTLY TO THE FOUNDATION. THE APPLICANT IS ALSO REQUIRED TO SUBMIT AN ESSAY (LIMITED TO 500 WORDS) DETAILING THE APPLICANT'S INTENTION TO LEVERAGE THE SCHOLARSHIP AWARD TO ATTEND A TOP ACADEMIC INSTITUTION.

### ANY SUBMISSION DEADLINES

NONE

#### RESTRICTIONS AND LIMITATIONS ON AWARDS

THE SIZE AND NUMBER OF SCHOLARSHIP AWARD(S) ARE DETERMINED ON A CASE-BY-CASE BASIS BY THE FOUNDATION.

## NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

CRAIG H. COMSTOCK 200 EAST CAMPERDOWN WAY GREENVILLE, SC 29601

TELEPHONE NUMBER

NAME OF GRANT PROGRAM

864-242-8204

GRANT PROGRAM

#### FORM AND CONTENT OF APPLICATIONS

THE GRANT APPLICATION REQUESTS A PROPOSAL SUMMARY DETAILING WHY THE APPLICANT IS REQUESTING GRANT FUNDS, AS WELL AS A NARRATIVE OF THE WORK OF THE APPLICANT ORGANIZATION. THE APPLICATION ALSO REQUESTS A CURRENT EXPENSE BUDGET FOR THE APPLICANT'S PROJECT(S) AND ALL SOURCES OF INCOME TOWARD THE PROJECT. AFTER THE FOUNDATION PRELIMINARILY APPROVES THE GRANT, THE FOUNDATION WILL ENTER IN TO A WRITEN AGREEMENT WITH THE GRANTEE THAT SPECIFIES IN DETAIL THE CHARITABLE PURPOSES OF THE GRANT.

#### ANY SUBMISSION DEADLINES

NONE

## RESTRICTIONS AND LIMITATIONS ON AWARDS

THE GRANT AGREEMENT REQUIRES GRANTEES TO REPAY ANY PORTION OF THE AMOUNT GRANTED WHICH IS NOT USED FOR THE PURPOSES OF THE GRANT OR DISTRIBUTION.