

Form **990-PF****Return of Private Foundation**

or Section 4947(a)(1) Trust Treated as Private Foundation

Department of the Treasury

Internal Revenue Service

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

OMB No. 1545-0047

**2019**

Open to Public Inspection

For calendar year 2019 or tax year beginning

, and ending

Name of foundation <b>THE SWIGERT FOUNDATION</b> <b>C/O ROBYN BREWER</b>		A Employer identification number <b>94-3122667</b>
Number and street (or P.O. box number if mail is not delivered to street address) <b>407 SW BROADWAY</b>	Room/suite	B Telephone number <b>503-225-2935</b>
City or town, state or province, country, and ZIP or foreign postal code <b>PORTLAND, OR 97205</b>		C If exemption application is pending, check here <input type="checkbox"/> <b>6</b>
G Check all that apply. <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1 Foreign organizations, check here <input type="checkbox"/> 2 Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation <b>04</b>		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) <b>\$ 16,287,578.</b>	J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				<b>N/A</b>	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities		<b>394,921.</b>	<b>394,921.</b>		<b>STATEMENT 1</b>
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		<b>559,709.</b>			
b Gross sales price for all assets on line 6a <b>2,594,755</b>					
7 Capital gain net income (from Part IV, line 2)			<b>559,709.</b>		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income					
12 Total Add lines 1 through 11		<b>954,630.</b>	<b>954,630.</b>		
13 Compensation of officers, directors, trustees, etc.		<b>0.</b>	<b>0.</b>		<b>0.</b>
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees <b>STMT 2</b>		<b>2,950.</b>	<b>0.</b>		<b>0.</b>
c Other professional fees <b>STMT 3</b>		<b>110,133.</b>	<b>0.</b>		<b>0.</b>
17 Interest					
18 Taxes <b>STMT 4</b>		<b>55,903.</b>	<b>0.</b>		<b>0.</b>
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses					
24 Total operating and administrative expenses Add lines 13 through 23		<b>168,986.</b>	<b>0.</b>		<b>0.</b>
25 Contributions, gifts, grants paid		<b>665,300.</b>			<b>665,300.</b>
26 Total expenses and disbursements. Add lines 24 and 25		<b>834,286.</b>	<b>0.</b>		<b>665,300.</b>
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		<b>120,344.</b>			
b Net investment income (if negative, enter -0-)			<b>954,630.</b>		
c Adjusted net income (if negative, enter -0-)				<b>N/A</b>	

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**THE SWIGERT FOUNDATION**  
**C/O ROBYN BREWER**

94-3122667

**Part II Balance Sheets**

Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	1 Cash - non-interest-bearing	7.	1.	1.
	2 Savings and temporary cash investments	764,317.	407,716.	407,716.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock <b>STMT 5</b>	8,839,143.	9,536,155.	11,749,004.
	c Investments - corporate bonds			
	<b>Liabilities</b>	11 Investments - land, buildings, and equipment basis ▶		
Less accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other <b>STMT 6</b>		4,290,396.	4,066,577.	4,130,857.
14 Land, buildings, and equipment: basis ▶				
Less accumulated depreciation ▶				
15 Other assets (describe ▶)				
16 <b>Total assets</b> (to be completed by all filers - see the instructions. Also, see page 1, item I)		13,893,863.	14,010,449.	16,287,578.
17 Accounts payable and accrued expenses				
18 Grants payable				
<b>Net Assets or Fund Balances</b>	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
23 <b>Total liabilities</b> (add lines 17 through 22)	0.	0.		
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow FASB ASC 958, check here</b> ▶ <input checked="" type="checkbox"/> <b>and complete lines 24, 25, 29, and 30</b>			
	24 Net assets without donor restrictions	13,893,863.	14,010,449.	
	25 Net assets with donor restrictions			
	<b>Foundations that do not follow FASB ASC 958, check here</b> ▶ <input type="checkbox"/> <b>and complete lines 26 through 30</b>			
	26 Capital stock, trust principal, or current funds			
	27 Paid-in or capital surplus, or land, bldg., and equipment fund			
	28 Retained earnings, accumulated income, endowment, or other funds			
	29 <b>Total net assets or fund balances</b>	13,893,863.	14,010,449.	
30 <b>Total liabilities and net assets/fund balances</b>	13,893,863.	14,010,449.		

**Part III Analysis of Changes in Net Assets or Fund Balances**

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 29 (must agree with end-of-year figure reported on prior year's return)	1	13,893,863.
2 Enter amount from Part I, line 27a	2	120,344.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	14,014,207.
5 Decreases not included in line 2 (itemize) ▶ <b>RETURN OF PRIN.</b>	5	3,758.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29	6	14,010,449.

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
<b>1a</b>			
<b>b</b> SEE ATTACHED STATEMENTS			
<b>c</b>			
<b>d</b>			
<b>e</b>			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))
<b>a</b>			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b> 2,594,755.		2,035,046.	559,709.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
<b>a</b>			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			559,709.

<b>2</b> Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	<b>2</b>	559,709.
<b>3</b> Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	{ }	<b>3</b>	N/A

**Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income**

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation doesn't qualify under section 4940(e). Do not complete this part.

**1** Enter the appropriate amount in each column for each year; see the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2018	806,991.	14,406,303.	.056017
2017	630,000.	14,495,031.	.043463
2016	663,689.	13,641,140.	.048653
2015	753,177.	13,796,705.	.054591
2014	625,610.	13,960,541.	.044813

<b>2</b> Total of line 1, column (d)	<b>2</b>	.247537
<b>3</b> Average distribution ratio for the 5-year base period - divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years	<b>3</b>	.049507
<b>4</b> Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	<b>4</b>	14,864,355.
<b>5</b> Multiply line 4 by line 3	<b>5</b>	735,890.
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)	<b>6</b>	9,546.
<b>7</b> Add lines 5 and 6	<b>7</b>	745,436.
<b>8</b> Enter qualifying distributions from Part XII, line 4	<b>8</b>	665,300.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

## THE SWIGERT FOUNDATION

C/O ROBYN BREWER

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**Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)**

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		1	19,093.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations, enter 4% of Part I, line 12, col (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)		2	0.
3 Add lines 1 and 2		3	19,093.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)		4	0.
5 Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0-		5	19,093.
6 Credits/Payments:			
a 2019 estimated tax payments and 2018 overpayment credited to 2019	6a	8,000.	
b Exempt foreign organizations - tax withheld at source	6b	0.	
c Tax paid with application for extension of time to file (Form 8868)	6c	0.	
d Backup withholding erroneously withheld	6d	0.	
7 Total credits and payments. Add lines 6a through 6d	7	8,000.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	421.	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	11,514.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be: Credited to 2020 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11		

**Part VII-A Statements Regarding Activities**

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition. If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year. (1) On the foundation. <input type="checkbox"/> \$ 0. (2) On foundation managers. <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input type="checkbox"/> \$ 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.		X
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		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
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?	X	
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	X	
8a Enter the states to which the foundation reports or with which it is registered. See instructions. <input type="checkbox"/> OR		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2019 or the tax year beginning in 2019? See the instructions for Part XIV. If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

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**Part 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		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		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>SWIGERTFOUNDATION.ORG</u>	X	
14 The books are in care of ► <u>ROBYN BREWER, UNION BANK OF CAL</u> Telephone no. ► <u>503-225-2935</u> Located at ► <u>407 SW BROADWAY</u> ZIP+4 ► <u>97205</u>		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year ► 15 N/A		
16 At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►		X

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

	Yes	No
1a During the year, did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions Organizations relying on a current notice regarding disaster assistance, check here N/A ► <input type="checkbox"/>	1b	
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2019?	1c	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)):		
a At the end of tax year 2019, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2019? If "Yes," list the years ► _____, _____, _____	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Are there any years listed in 2a for which the foundation is <b>not</b> 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	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► _____, _____, _____		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 2019 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use 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 charitable purposes?	4a	X
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

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

		Yes	No
<b>5a</b> During the year, did the foundation pay or incur any amount to:			
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
<b>b</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	<b>5b</b>	
Organizations relying on a current notice regarding disaster assistance, check here <input type="checkbox"/>			
<b>c</b> If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	N/A <input type="checkbox"/> Yes <input type="checkbox"/> No		
If "Yes," attach the statement required by Regulations section 53.4945-5(d).			
<b>6a</b> Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
<b>b</b> Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		<b>6b</b>	<b>X</b>
If "Yes" to 6b, file Form 8870.			
<b>7a</b> At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
<b>b</b> If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	N/A	<b>7b</b>	
<b>8</b> Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		

**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

**1** List all officers, directors, trustees, and foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 7		0.	0.	0.

**2** Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

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



**Part X Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see instructions.)

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	14,504,700.
<b>b</b>	Average of monthly cash balances	<b>1b</b>	586,016.
<b>c</b>	Fair market value of all other assets	<b>1c</b>	
<b>d</b>	<b>Total</b> (add lines 1a, b, and c)	<b>1d</b>	15,090,716.
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	0.
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	0.
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	15,090,716.
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	<b>4</b>	226,361.
<b>5</b>	<b>Net value of noncharitable-use assets</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	14,864,355.
<b>6</b>	<b>Minimum investment return</b> Enter 5% of line 5	<b>6</b>	743,218.

**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.)

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	743,218.
<b>2a</b>	Tax on investment income for 2019 from Part VI, line 5	<b>2a</b>	19,093.
<b>b</b>	Income tax for 2019. (This does not include the tax from Part VI)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	19,093.
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	724,125.
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	0.
<b>5</b>	Add lines 3 and 4	<b>5</b>	724,125.
<b>6</b>	Deduction from distributable amount (see instructions)	<b>6</b>	0.
<b>7</b>	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b>	724,125.

**Part XII Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b>	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	<b>1a</b>	665,300.
<b>b</b>	Program-related investments - total from Part IX-B	<b>1b</b>	0.
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	<b>4</b>	665,300.
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	<b>5</b>	0.
<b>6</b>	<b>Adjusted qualifying distributions</b> Subtract line 5 from line 4	<b>6</b>	665,300.

**Note.** The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.



**Part XIII** Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2018	(c) 2018	(d) 2019
<b>1</b> Distributable amount for 2019 from Part XI, line 7				724,125.
<b>2</b> Undistributed income, if any, as of the end of 2019				
<b>a</b> Enter amount for 2018 only			0.	
<b>b</b> Total for prior years:		0.		
<b>3</b> Excess distributions carryover, if any, to 2019.				
<b>a</b> From 2014				
<b>b</b> From 2015				
<b>c</b> From 2016				
<b>d</b> From 2017				
<b>e</b> From 2018	113,716.			
<b>f</b> Total of lines 3a through e	113,716.			
<b>4</b> Qualifying distributions for 2019 from Part XII, line 4: ► \$ 665,300.				
<b>a</b> Applied to 2018, but not more than line 2a			0.	
<b>b</b> Applied to undistributed income of prior years (Election required - see instructions)		0.		
<b>c</b> Treated as distributions out of corpus (Election required - see instructions)	0.			
<b>d</b> Applied to 2019 distributable amount				665,300.
<b>e</b> Remaining amount distributed out of corpus	0.			
<b>5</b> Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount must be shown in column (a).)	58,825.			58,825.
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	54,891.			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b		0.		
<b>c</b> 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.		
<b>d</b> Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
<b>e</b> Undistributed income for 2018. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
<b>f</b> Undistributed income for 2019. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020				0.
<b>7</b> 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.			
<b>8</b> Excess distributions carryover from 2014 not applied on line 5 or line 7	0.			
<b>9</b> Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a	54,891.			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2015				
<b>b</b> Excess from 2016				
<b>c</b> Excess from 2017				
<b>d</b> Excess from 2018	54,891.			
<b>e</b> Excess from 2019				



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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution * *	Amount
Name and address (home or business)				
a Paid during the year				
ALANO CLUB OF PORTLAND 909 NW 24TH AVE PORTLAND, OR 97210	NONE		MEMBERSHIP (\$2,000) & RECOVERY TOOLKIT, HIRE STAFF & EVALUATE PROGAM (\$15,000)	17,000.
CATLIN GABEL 8825 SW BARNES ROAD PORTLAND, OR 97225	NONE		MEMBERSHIP	2,000.
FRIENDS OF THE OREGON CAVES 19000 CAVES HWY CAVE JUNCTION, OR 97523	NONE		MEMBERSHIP	1,000.
HUMANE SOCIETY OF SW WASHINGTON 1100 NE 192ND AVE VANCOUVER, WA 98684	NONE		MEMBERSHIP	2,000.
METRO ARTS 0240 SW CANBY STREET PORTLAND, OR 97219	NONE		MEMBERSHIP	2,000.
Total			SEE CONTINUATION SHEET(S) ▶ 3a	665,300.
b Approved for future payment				
NONE				
Total			▶ 3b	0.

▶ 3a ▶ 3b

Form 990-PF (2019)





**Part IV** Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr)	(d) Date sold (mo., day, yr.)
1a	300 UNITED TECHNOLOGIES CORP	P		03/11/19
b	1600 ORACLE CORP	P		03/11/19
c	1200 XILINX INC.	P		03/11/19
d	1400 QUALCOMM INC.	P		03/11/19
e	700 STARBUCK CORP.	P		03/11/19
f	251 CVS HEALTH	P		03/11/19
g	450 CME GROUP	P		03/11/19
h	8500 T ROWE PRICE	P		03/25/19
i	450 OCCIDENTAL PETE CORP	P		05/28/19
j	32000 VNVD LT INVESTMENT GRADE	P		05/28/19
k	12000 VICTORY SYCAMORE EST VAL R6 #308	P		07/08/19
l	900 BRISTOL MEYER SQUIBB	P		12/10/19
m	253 PIMCO TOTAL RETURN	P		03/08/19
n	477 PIMCO LOW DURATION	P		03/08/19
o	26 VNVD ST TERM INVMET GRADE	P		03/08/19

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	37,492.	39,017.	-1,525.
b	83,447.	74,810.	8,637.
c	144,568.	81,940.	62,628.
d	76,712.	82,137.	-5,425.
e	49,815.	47,695.	2,120.
f	13,580.	20,259.	-6,679.
g	77,919.	76,871.	1,048.
h	478,975.	518,840.	-39,865.
i	23,384.	29,819.	-6,435.
j	326,720.	300,160.	26,560.
k	475,800.	485,370.	-9,570.
l	2,141.	1,917.	224.
m	2,530.	2,825.	-295.
n	4,641.	4,985.	-344.
o	274.	281.	-7.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			-1,525.
b			8,637.
c			62,628.
d			-5,425.
e			2,120.
f			-6,679.
g			1,048.
h			-39,865.
i			-6,435.
j			26,560.
k			-9,570.
l			224.
m			-295.
n			-344.
o			-7.

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }	2	
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8 }	3	

**Part IV** Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	316 EATON VANCE FLAT RATE HI INC	P		03/08/19
b	140 ABBOTT LABS COM	P		03/11/19
c	562 BASTER INTL COM	P		03/11/19
d	150 NORTHRUP GRUMMAN CORP	P		03/11/19
e	650 PEPSICO INC.	P		03/11/19
f	270 ECOLAB INC.	P		03/11/19
g	700 HOME DEPOT	P		03/11/19
h	600 GILEAD SCIENCES INC.	P		03/11/19
i	180 HONEYWELL INTL.	P		03/11/19
j	5 VERIZON COMMUNICATIONS	P		03/11/19
k	1000 USBANCORP	P		03/11/19
l	438 CHEVRON CORP COMMON STOCK	P		03/11/19
m	760 CONOCOPHILLIPS	P		03/11/19
n	112 MERCK & CO	P		03/11/19
o	781 KRAFT HEINZ CO COM	P		03/11/19

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 2,762.		2,806.	-44.
b 10,873.		5,044.	5,829.
c 41,972.		6,792.	35,180.
d 41,996.		6,956.	35,040.
e 75,513.		34,584.	40,929.
f 45,890.		29,468.	16,422.
g 129,047.		6,740.	122,307.
h 37,737.		14,340.	23,397.
i 27,602.		13,594.	14,008.
j 279.		260.	19.
k 50,964.		1,972.	48,992.
l 53,989.		49,151.	4,838.
m 51,896.		39,393.	12,503.
n 9,057.		6,460.	2,597.
o 25,394.		33,401.	-8,007.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			-44.
b			5,829.
c			35,180.
d			35,040.
e			40,929.
f			16,422.
g			122,307.
h			23,397.
i			14,008.
j			19.
k			48,992.
l			4,838.
m			12,503.
n			2,597.
o			-8,007.

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7  
If (loss), enter "-0-" in Part I, line 7 }

2

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6).

If gain, also enter in Part I, line 8, column (c).

If (loss), enter "-0-" in Part I, line 8

3

**Part IV** Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a 600 MONDELEZ INTL INC CL A		P		05/28/19
b 900 CELGENE CORP. MERGER		P		11/21/19
c CAPITAL GAINS DIVIDENDS				
d				
e				
f				
g				
h				
i				
j				
k				
l				
m				
n				
o				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 31,082.		17,159.	13,923.
b 34,722.			34,722.
c 125,982.			125,982.
d			
e			
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			13,923.
b			34,722.
c			125,982.
d			
e			
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }	2	559,709.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8 }	3	N/A



THE SWIGERT FOUNDATION  
C/O ROBYN BREWER

94-3122667

**Part XV** Supplementary Information

**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
MULTNOMAH ATHLETIC FOUNDATION 1849 SW SALMON ST PORTLAND, OR 97205	NONE		MEMBERSHIP	1,000.
OHSU FOUNDATION 1121 SW SALMON ST #100 PORTLAND, OR 97205	NONE		MEMBERSHIP	2,000.
OMSI 1945 SW WATER AVE PORTLAND, OR 97214	NONE		MEMBERSHIP	1,000.
OREGON BALLET THEATRE 818 SE 6TH AVE PORTLAND, OR 97214	NONE		MEMBERSHIP (\$1,000) SUPPORT OF THE AMERICANS 2.0 SHOW (\$25,000)	26,000.
OREGON HISTORICAL SOCIETY 1200 SW PARK AVE PORTLAND, OR 97205	NONE		MEMBERSHIP	1,000.
OREGON SYMPHONY 923 SW WASHINGTON ST PORTLAND, OR 97205	NONE		MEMBERSHIP	2,000.
PORTLAND ART MUSEUM 1219 SW PARK AVE PORTLAND, OR 97205	NONE		MEMBERSHIP	2,000.
PORTLAND OPERA 211 SE CARUTHERS ST PORTLAND, OR 97214	NONE		MEMBERSHIP	1,000.
WORLD FORESTRY CENTER 4033 SW CANYON ROAD PORTLAND, OR 97221	NONE		MEMBERSHIP	2,000.
LIBERTY RESTORATION INC (DBA LIBERTY) 1203 COMMERCIAL ST. ASTORIA, OR 97103	NONE		THEATRE IMPROVEMENTS	5,000.
Total from continuation sheets				641,300.

**THE SWIGERT FOUNDATION  
C/O ROBYN BREWER**

94-3122667

**Part XV Supplementary Information**

**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
PACIFIC NW COLLEG OF ART 511 NW BROADWAY PORTLAND, OR 97209	NONE		FOR GLASS BUILDINGS RENO EXPENSESES	25,000.
WILLAMETTE FALLS TRUST PO BOX 2588 OREGON CITY, OR 97045	NONE		PHASE 1 OF RIVERWALK	25,000.
THE LIBRARY FOUNDATION 620 SW 5TH AVE #1025 PORTLAND, OR 97204	NONE		LITERACY PROGRAMS SUPPORT	10,000.
OREGON COAST AQUARIUM 2820 SE FERRY SLIP ROAD NEWPORT, OR 97365	NONE		PACIFIC RIM EXHIBIT	10,000.
PORTLAND YOUTH PHILHARMONIC 9320 S BARBUR BLVD. #140 PORTLAND, OR 97219	NONE		SCHOOL MUSIC ENRICHMENT PROGRAM	5,000.
YOUNG AUDIENCES OF OREGON & SW WASHINGTON 1220 SW MORRISON ST PORTLAND, OR 97205	NONE		ELEVATE YOUNG AUDIENCE CAMPAIGN	25,000.
PROVIDENCE ST. VINCENT FOUNDATION 9205 SW BARNES ROAD PORTLAND, OR 97225	NONE		THE CENTER FOR HEALTHCARE ETHICS	10,000.
COMMUNITY TRANSITIONAL SCHOOL 6601 NE KILLINGSWORTH ST PORTLAND, OR 97218	NONE		OPERATING SUPPORT	5,000.
ADELANTE MUJERES 2030 MAIN ST SUITE A FOREST GROVE, OR 97116	NONE		PROGRAMMING SERVICES (CHICAS)	10,000.
BOYS & GIRLS CLUB OF SW WASHINGTON 111 SW MAIN STREET #605 VANCOUVER, WA 98660	NONE		EDUCATION & LEADERSHIP PROGRAMS	25,000.
<b>Total from continuation sheets</b>				

**THE SWIGERT FOUNDATION  
C/O ROBYN BREWER**

94-3122667

**Part XV Supplementary Information**

**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
CASA OF CLACKAMAS COUNTY 421 HIGH ST. #108 OREGON CITY, OR 97045	NONE		FOSTERING FUTURES PROJECT	5,000.
CASA FOR CHILDREN OF MULTNOMAH COUNTY 1401 NE 68TH AVE PORTLAND, OR 97213	NONE		TRAINING IN EDUCATIONAL ADVOCACY	5,000.
GLEANERS OF CLACKAMAS COUNTY 13821 FIR STREET OREGON CITY, OR 97045	NONE		PROGRAM SUPPORT	10,000.
LAPINE COMMUNITY KITCHEN 16480 FINLEY BUTTE RD LAPINE, OR 97739	NONE		HOT MEAL PROGRAM	10,000.
LIFEWORCS NW 14600 NW CORNELL RD BEAVERTON, OR 97229	NONE		SUPPORT REAL PROGRAM	5,000.
NORTHWEST OUTWARD BOUND SCHOOL 1411 SW MORRISON ST #250 PORTLAND, OR 97205	NONE		TRIBAL YOUTH PARTNERSHIP PROGRAM	10,000.
OREGON NETWORK OF CHILD ABUSE INTERVENTION CENTERS 2800 N VANCOUVER AVE., SUITE 201 PORTLAND, OR 97227	NONE		MATCHING FUNDS FOR SYSTEM IMPROVEMNTS & PREVENTION NETWORK	5,000.
OREGON TECH FOUNDATION 3201 CAMPUS DRIVE KLAMATH FALLS, OR 97601	NONE		FOR FORMULA ONE SAE & BAJA SAE COMPETITIONS	10,000.
READING RESULTS 3115 NE SANDY BLVD #229 PORTLAND, OR 97232	NONE		READING INTERVENTION PROGRAM EXPANSION	5,000.
SOCIETY OF ST VINCENT DEPAUL 8101 SE CORNWELL ST PORTLAND, OR 97206	NONE		OPERATING SUPPORT FOR EMERGENCY FAMILY ASSISTANCE	10,000.
<b>Total from continuation sheets</b>				

**THE SWIGERT FOUNDATION  
C/O ROBYN BREWER**

94-3122667

**Part XV Supplementary Information**

**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
STATE OF SAFETY PO BOX 28221 PORTLAND, OR 97228	NONE		OPERATING SUPPORT	20,000.
TRAILKEEPERS OF OREGON PO BOX 14814 PORTLAND, OR 97293	NONE		EAGLE CREEK FIRE TRAIL REHAB & RECOVERY	15,000.
URBAN GLEANERS 15 SE 6TH AVE PORTLAND, OR 97214	NONE		PREVENTION OF CHILDHOOD HUNGER	10,000.
WILLIAM TEMPLE HOUSE 2230 NW GLISAN ST PORTLAND, OR 97210	NONE		SUPPORT HEALTHY FOOD PANTRY	20,000.
DALLAS WASCO COUNTY LIBRARY FOUNDATION 722 COURT STREET THE DALLAS, OR 97058	NONE		CONSTRUCTON OF NEW LIBRARY	10,000.
DE LASALLE NORTH CATHOLIC HIGH SCHOOL 7528 N FENWICK AVE PORTLAND, OR 97217	NONE		BUILD THEIR OWN CAMPUS	30,000.
SISTERS OF ST MARYS FOUNDTION 4440 SW 148TH AVE BEAVERTON, OR 97007	NONE		RENOVATE SKILLED CARE FACILITY	5,000.
ALLIANCE FRANCAISE DE PORTLAND 1425 SW 20TH AVE #104 PORTLAND, OR 97201	NONE		18TH ANNUAL BASTILLE DAY FESTIVAL	5,000.
METROPOLITAN YOUTH SYMPHONY 4800 S MACADAM AVE PORTLAND, OR 97239	NONE		MUSIC ACCESS PROGRAM SUPPORT	10,000.
OREGON COAST YOUTH SYMPHONY FESTIVAL PO BOX 2405 NEWPORT, OR 97365	NONE		FUNDS TOWARD 4 DAY FESTIVAL	3,300.
<b>Total from continuation sheets</b>				

THE SWIGERT FOUNDATION  
C/O ROBYN BREWER

94-3122667

**Part XV** Supplementary Information

**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
MEDICAL TEAMS INTERNATIONAL 14150 SW MILTON CT PORTLAND, OR 97224	NONE		FUNDS FOR MEDICAL IMAGING TECHNOLOGY	30,000.
OREGON STATE UNIVERSITY PO BOX 1086 CORVALLIS, OR 97331	NONE		WEB BASED ANALYTICS SOFTWARE DEVELOPMENT	10,000.
ASPIRE PROJECT 8426 N LOMBARD PORTLAND, OR 97203	NONE		MATH TUTORING & COMPUTER PROGRAMING	3,000.
CLACKAMAS WOMENS SERVICES 256, A SAFE PLACE FAMILY JUSTICE CENTER, WARNER MILNE RD OREGON CITY, OR 97045	NONE		COMMUNITY FOR SAFE KIDS CURRICULUM	5,000.
COLLEGE POSSIBLE 532 SE GRAND AVE PORTLAND, OR 97214	NONE		TO PROVIDE INTENSIVE SUPPORT FOR STUDENTS	10,000.
FRIENDLY HOUSE 1737 NW 26TH AVE PORTLAND, OR 97210	NONE		FUNDS FOR THEIR SENIOR PROGRAM	15,000.
GIRLS INC. 4800 SW MACADAM AVE, SUITE #309 PORTLAND, OR 97239	NONE		TOWARD THEIR EUREKA! PROGRAM	10,000.
HABITAT FOR HUMANITY 1478 NE KILLINGSWORTH ST PORTLAND, OR 97211	NONE		BUILDING PROGRAM	20,000.
WEST TUALITY HABITAT FOR HUMANITY 3731 PACIFIC AVE FOREST GROVE, OR 97116	NONE		IMPROVEMENTS TO RESTORE	5,000.
HOUSECALL PROVIDERS 5100 S MACADAM AVE #200 PORTLAND, OR 97239	NONE		HOME BASED PRIMARY CARE, PALLATIVE CARE & HOSPICE CARE	5,000.
Total from continuation sheets				

**THE SWIGERT FOUNDATION  
C/O ROBYN BREWER**

94-3122667

**Part XV Supplementary Information**

**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
INSIGHT 111 SW COLUMBIA ST SUITE #940 PORTLAND, OR 97201	NONE		PURCHASE WHEELCHAIR ACCESSIBLE VAN	7,000.
MEALS ON WHEELS PEOPLE 7710 SW 31ST AVE PORTLAND, OR 97219	NONE		FUNDS TO SUPPORT MWP	20,000.
NATIONAL MULTIPLE SCLEROSIS SOCIETY 5331 S MACADAM AVE #290 PORTLAND, OR 97239	NONE		TOWARD MS NAVIGATION PROGRAM	10,000.
NW ASSOCIATION FOR BLIND ATHLETES 703 BROADWAY ST #600 VANCOUVER, WA 98660	NONE		CAMP SPARK SUPPORT	5,000.
OREGON FOOD BANK 7900 NE 33RD DR PORTLAND, OR 97211	NONE		COMMUNITY SUPPORT	15,000.
PATHFINDERS OF OREGON 2501 SW 1ST AVE #300 PORTLAND, OR 97201	NONE		MENTORING PROGRAM	15,000.
P:EAR 338 NW 6H AVE PORTLAND, OR 97209	NONE		JOB TRAINING PROGRAM	15,000.
PORTLAND RESCUE MISSION PO BOX 3713 PORTLAND, OR 97208-3713	NONE		SUPPORT MEALS AT BURNSIDE SHELTER	4,000.
PORTLAND YOUTHBUILDERS 4816 SE 92ND AVE PORTLAND, OR 97266	NONE		FOR TECHNOLOGY IN SERVICE PROGRAM	10,000.
RAPHAEL HOUSE OF PORTLAND 4110 SE HAWTHORNE BLVD PORTLAND, OR 97214	NONE		SURVIVORS OF DOMESTIC VIOLENCE PROGRAM	10,000.
<b>Total from continuation sheets</b>				

94-3122667

**3 Grants and Contributions Paid During the Year (Continuation)**

923631  
04-01-19

**Part XV** Supplementary Information

3a Grants and Contributions Paid During the Year Continuation of Purpose of Grant or Contribution

NAME OF RECIPIENT - HUMANE SOCIETY OF SW WASHINGTON

MEMBERSHIP

MEMBERSHIP



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FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	1
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
UNION BANK	520,903.	125,982.	394,921.	394,921.	
TO PART I, LINE 4	520,903.	125,982.	394,921.	394,921.	

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FORM 990-PF	ACCOUNTING FEES	STATEMENT	2
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAX PREPERATION	2,950.	0.		0.
TO FORM 990-PF, PG 1, LN 16B	2,950.	0.		0.

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FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
UBOC FEES	110,133.	0.		0.
TO FORM 990-PF, PG 1, LN 16C	110,133.	0.		0.

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FORM 990-PF	TAXES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL, STATE AND FR. TAXES	55,903.	0.		0.
TO FORM 990-PF, PG 1, LN 18	55,903.	0.		0.

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FORM 990-PF	CORPORATE STOCK	STATEMENT	5
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
EQUITIES	9,536,155.	11,749,004.
TOTAL TO FORM 990-PF, PART II, LINE 10B	9,536,155.	11,749,004.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	6
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
FIXED INCOME	COST	4,066,577.	4,130,857.
TOTAL TO FORM 990-PF, PART II, LINE 13		4,066,577.	4,130,857.

FORM 990-PF	PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS	STATEMENT	7
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NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
ELIZABETH K. WARREN PORTLAND, OREGON	PRESIDENT 0.00	0.	0.	0.
HENRY T. SWIGERT PORTLAND, OREGON	DIRECTOR 0.00	0.	0.	0.
WENDY WARREN PORTLAND, OREGON	VP 0.00	0.	0.	0.
KATE WARREN HALL PORTLAND, OREGON	VP & SECRETARY 0.00	0.	0.	0.
ADDISON GRONQUIST PORTLAND, OREGON	DIRECTOR 0.00	0.	0.	0.

THE SWIGERT FOUNDATION C/O ROBYN BREWER

94-3122667

DORN SWIGERT	DIRECTOR			
PORTLAND, OREGON	0.00	0.	0.	0.
ELIZABETH BLISS WARREN (BETSY)	DIRECTOR			
	0.00	0.	0.	0.
CHARLES SNOW	DIRECTOR			
	0.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		<u>0.</u>	<u>0.</u>	<u>0.</u>