

EXTENDED TO MARCH 15, 2021

## Return of Private Foundation

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

- Do not enter social security numbers on this form as it may be made public  
Go to [www.irs.gov/Form990PF](http://www.irs.gov/Form990PF) for instructions and the latest information.

OMB No 1545-0047

2019

Open to Public Inspection

Form 990-PF

Department of the Treasury  
Internal Revenue Service

For calendar year 2019 or tax year beginning

MAY 1, 2019

, and ending

APR 30, 2020

Name of foundation

A Employer identification number

ANNMARIE FOUNDATION, INC.

23-7301323

Number and street (or P.O. box number if mail is not delivered to street address)

Room/suite

B Telephone number

651-303-2246

City or town, state or province, country, and ZIP or foreign postal code

MEDFORD, WI 54451

C If exemption application is pending, check here ☐

G Check all that apply

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name changeD 1 Foreign organizations, check here ☐2 Foreign organizations meeting the 85% test, check here and attach computation ☐

H Check type of organization.

☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundationE If private foundation status was terminated under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

I Fair market value of all assets at end of year

(from Part II, col. (c), line 16)

J Accounting method

☐ Cash☒ Accrual☐ Other (specify)

(Part I, column (d), must be on cash basis.)

Part I Analysis of Revenue and Expenses

(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))

(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

81,000.

2 Check ☐ if the foundation is not required to attach Sch. D

3 Interest on savings and temporary cash investments

190,225.

190,225.

STATEMENT 1

4 Dividends and interest from securities

5a Gross rents

b Net rental income or (loss)

6a Net gain or (loss) from sale of assets not on line 10

b Gross sales price for all assets on line 6a 1,112,680.

260,047.

260,047.

7 Capital gain net income (from Part IV, line 2)

8 Net short-term capital gain

9 Income modifications

10a Gross sales less returns and allowances

b Less Cost of goods sold

c Gross profit or (loss)

11 Other income

12 Total Add lines 1 through 11

531,272.

450,272.

13 Compensation of officers, directors, trustees, etc.

0.

0.

0.

14 Other employee salaries and wages

15 Pension plans, employee benefits

16a Legal fees

b Accounting fees

c Other professional fees

STMT 2

39,891.

25,408.

14,483.

17 Interest

18 Taxes

STMT 3

14,010.

0.

0.

19 Depreciation and depletion

20 Occupancy

21 Travel, conferences, and meetings

6,327.

0.

6,327.

22 Printing and publications

23 Other expenses

STMT 4

800.

0.

800.

24 Total operating and administrative expenses Add lines 13 through 23

61,028.

25,408.

21,610.

25 Contributions, gifts, grants paid

338,154.

338,154.

26 Total expenses and disbursements Add lines 24 and 25

399,182.

25,408.

359,764.

27 Subtract line 26 from line 12:

a Excess of revenue over expenses and disbursements

132,090.

b Net investment income (if negative enter -0-)

424,864.

c Adjusted net income (if negative, enter -0-)

N/A

<b>Part II Balance Sheets</b> 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		2,424.	2,361.	2,361.
	2	Savings and temporary cash investments		48,242.	68,921.	68,921.
	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 STMT 5		62,407.	237,239.	237,239.
	b	Investments - corporate stock STMT 6		5,570,500.	4,812,630.	4,812,630.
	c	Investments - corporate bonds STMT 7		3,222,557.	3,112,252.	3,112,252.
	11	Investments - land, buildings, and equipment basis ▶				
	Less: accumulated depreciation ▶					
12	Investments - mortgage loans					
13	Investments - other					
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)		8,906,130.	8,233,403.	8,233,403.	
<b>Liabilities</b>	17	Accounts payable and accrued expenses				
	18	Grants payable				
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable				
	22	Other liabilities (describe ▶)				
23	<b>Total liabilities</b> (add lines 17 through 22)		0.	0.		
<b>Net Assets or Fund Balances</b>	Foundations that follow FASB ASC 958, check here ▶ <input type="checkbox"/> and complete lines 24, 25, 29, and 30					
	24	Net assets without donor restrictions				
	25	Net assets with donor restrictions				
	Foundations that do not follow FASB ASC 958, check here ▶ <input checked="" type="checkbox"/> and complete lines 26 through 30.					
	26	Capital stock, trust principal, or current funds		1,103,122.	1,103,122.	
	27	Paid-in or capital surplus, or land, bldg, and equipment fund		0.	0.	
	28	Retained earnings, accumulated income, endowment, or other funds		7,803,008.	7,130,281.	
	29	<b>Total net assets or fund balances</b>		8,906,130.	8,233,403.	
30	<b>Total liabilities and net assets/fund balances</b>		8,906,130.	8,233,403.		

**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	8,906,130.
2	Enter amount from Part I, line 27a	2	132,090.
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	9,038,220.
5	Decreases not included in line 2 (itemize) ▶ <b>CURRENT YEAR UNREALIZED LOSS</b>	5	804,817.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29	6	8,233,403.

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**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 PUBLICLY TRADED SECURITIES</b>			
<b>b CAPITAL GAINS DIVIDENDS</b>			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 892,499.		852,633.	39,866.
b 220,181.			220,181.
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			39,866.
b			220,181.
c			
d			
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	260,047.
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

**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	402,106.	8,503,600.	.047287
2017	384,857.	8,439,546.	.045602
2016	372,651.	7,672,090.	.048572
2015	380,504.	7,432,645.	.051194
2014	398,553.	7,018,197.	.056789

2 Total of line 1, column (d)	2	.249444
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years	3	.049889
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	8,647,236.
5 Multiply line 4 by line 3	5	431,402.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	4,249.
7 Add lines 5 and 6	7	435,651.
8 Enter qualifying distributions from Part XII, line 4	8	359,764.

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

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		1	8,497.
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	8,497.
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	8,497.
6 Credits/Payments:			
a 2019 estimated tax payments and 2018 overpayment credited to 2019	6a	9,498.	
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	9,498.	
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	15.	
9 Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	986.	
11 Enter the amount of line 10 to be Credited to 2020 estimated tax	11	986.	Refunded

**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. \$ 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.		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. WI		
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

**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 <b>▶ HTTP://ANNMARIEFOUNDATION.ORG/</b>	X	
14 The books are in care of <b>▶ JIM SOLINSKY</b> Telephone no <b>▶ 651-303-2246</b> Located at <b>▶ P.O. BOX 44, MEDFORD, WI</b> ZIP+4 <b>▶ 54451</b>		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here <b>▶</b> and enter the amount of tax-exempt interest received or accrued during the year <b>▶ 15</b> 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 <b>▶</b>		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 <b>▶</b> <input type="checkbox"/> N/A		
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?		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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years <b>▶</b> _____ b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) <b>▶</b> <input type="checkbox"/> N/A c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. <b>▶</b> _____		
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.) <b>▶</b> <input type="checkbox"/> N/A		
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? 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?		X

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

5a During the year, did the foundation pay or incur any amount to:

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions ☐ Yes ☒ 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? ☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions **N/A**

Organizations relying on a current notice regarding disaster assistance, check here ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? **N/A** ☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ Yes ☒ No

If "Yes" to 6b, file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? **N/A**

8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? ☐ Yes ☒ 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 8		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

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**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 service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services		0

**Part IX-A** Summary of Direct Charitable Activities

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

	Expenses
1 N/A	
2	
3	
4	

**Part IX-B** Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

	Amount
1	
2	
All other program-related investments. See instructions	
3 NONE	
Total. Add lines 1 through 3	0.
	0.

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	8,691,309.
b	Average of monthly cash balances	1b	87,611.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	8,778,920.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	8,778,920.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	131,684.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	8,647,236.
6	Minimum investment return. Enter 5% of line 5	6	432,362.

**Part XI** Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations, check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	432,362.
2a	Tax on investment income for 2019 from Part VI, line 5	2a	8,497.
b	Income tax for 2019. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	8,497.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	423,865.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	423,865.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	423,865.

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

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	359,764.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4	4	359,764.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	359,764.

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.

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**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				423,865.
<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	54,775.			
<b>b</b> From 2015	19,888.			
<b>c</b> From 2016				
<b>d</b> From 2017				
<b>e</b> From 2018				
<b>f</b> Total of lines 3a through e	74,663.			
<b>4</b> Qualifying distributions for 2019 from Part XII, line 4 ▶ \$	359,764.			
<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				359,764.
<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).)	64,101.			64,101.
<b>6</b> Enter the net total of each column as indicated below	10,562.			
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
<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 instructions			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	10,562.			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2015	10,562.			
<b>b</b> Excess from 2016				
<b>c</b> Excess from 2017				
<b>d</b> Excess from 2018				
<b>e</b> Excess from 2019				

**Part XIV Private Operating Foundations** (see instructions 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 for 2019, enter the date of the ruling

- b Check box to indicate whether the foundation is a private operating foundation described in section

☐ 4942(j)(3) or ☐ 4942(j)(5)

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

Tax year

Prior 3 years

(a) 2019

(b) 2018

(c) 2017

(d) 2016

(e) Total

- b** 85% of line 2a

- c** Qualifying distributions from Part XII,  
line 4, for each year listed

- d** Amounts included in line 2c not used directly for active conduct of exempt activities

- e Qualifying distributions made directly for active conduct of exempt activities

- 3 Subtract line 2d from line 2c  
Complete 3a, b, or c for the  
alternative test relied upon

- a "Assets" alternative test - enter  
(1) Value of all assets

- (2) Value of assets qualifying under section 4942(j)(3)(B)(i)

- b** "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6, for each year listed

- c "Support" alternative test - enter:

- (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

- (2) Support from general public and 5 or more exempt organizations as provided in section 4942(i)(3)(B)(iii)

- (3) Largest amount of support from an exempt organization

- (4) Gross investment income

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

## 1 Information Regarding Foundation Managers:

- a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2) )

NONE

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

NONE

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

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

- a The name, address, and telephone number or email address of the person to whom applications should be addressed

SEE STATEMENT 9

- b The form in which applications should be submitted and information and materials they should include

- c Any submission deadlines

- d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors.

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

Recipient 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
<b>a</b> Paid during the year				
SEE ATTACHMENT				338,154.
<b>Total</b>			<b>3a</b>	338,154.
<b>b</b> Approved for future payment				
NONE				
<b>Total</b>			<b>3b</b>	0.





**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](http://www.irs.gov/Form990) for the latest information.

OMB No 1545-0047

**2019**

Name of the organization

Employer identification number

ANNMARIE FOUNDATION, INC.

23-7301323

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

☒ 501(c)(3) exempt private foundation☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation☐ 501(c)(3) taxable private foundationCheck 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**

- ☒ 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 contributions.

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

Name of organization

Employer identification number

ANNMARIE FOUNDATION, INC.

23-7301323

**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	LOUIS VOKURKA W7009 RASKIE ROAD PHILLIPS, WI 54555	\$ 50,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
2	DEBRA CERVENKA 4200 MINNESOTA AVENUE DULUTH, MN 55802	\$ 31,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)

Name of organization	Employer identification number
ANNMARIE FOUNDATION, INC.	23-7301323

**Part II** **Noncash Property** (see instructions) Use duplicate copies of Part 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
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	



Name of organization

Employer identification number

ANNMARIE FOUNDATION, INC.

23-7301323

**Part III**

Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this info. once) ▶ \$ \_\_\_\_\_

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

## FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
DIVIDENDS ON SECURITIES	220,181.	220,181.	0.	0.	
INTEREST ON CORPORATE BONDS	190,225.	0.	190,225.	190,225.	
TO PART I, LINE 4	410,406.	220,181.	190,225.	190,225.	

## FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 2

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ADMIN SERVICES	14,483.	0.		14,483.
INVESTMENT MANAGEMENT FEES	25,408.	25,408.		0.
TO FORM 990-PF, PG 1, LN 16C	39,891.	25,408.		14,483.

## FORM 990-PF TAXES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL EXCISE TAXES	14,010.	0.		0.
TO FORM 990-PF, PG 1, LN 18	14,010.	0.		0.

## FORM 990-PF OTHER EXPENSES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
WEBSITE	800.	0.		800.
TO FORM 990-PF, PG 1, LN 23	800.	0.		800.

FORM 990-PF U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS STATEMENT 5

DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
FANNIE MAE POOL FN 547785 7% 01 SEP 2030	X		61.	61.
FANNIE MAE POOL FN 789344 5.5% 01 JUL 2034	X		712.	712.
FREDDIE MAC GOLD POOL FG A13480 5.5% 01 SEP 2033	X		853.	853.
FREDDIE MAC GOLD POOL FG J03500 6% 01 OCT 2021	X		178.	178.
GINNIE MAE I POOL GN 511734 7.5% 15 OCT 2030	X		81.	81.
UNITED STATES TREASURY NOTE/BOND 3.625% 15 FEB	X		10,272.	10,272.
DEFOREST WI TXBL-REF-SER F 22 AUG 2018 4% 01 MAY		X	61,666.	61,666.
OWENSBORO KY TXBL-REF-SER D 23 OCT 2019 2.25% 01 JUN 2025		X	62,091.	62,091.
WINSTON SALEM NE LTD OBLG TXBL-REF-SER B 29 JAN 2020 1.98% 01 JUN 2022		X	101,325.	101,325.
TOTAL U.S. GOVERNMENT OBLIGATIONS			12,157.	12,157.
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS			225,082.	225,082.
TOTAL TO FORM 990-PF, PART II, LINE 10A			237,239.	237,239.

FORM 990-PF CORPORATE STOCK STATEMENT 6

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
FMI LARGE CAP FUND	2,372,338.	2,372,338.
T ROWE PRICE BLUE CHIP GROWTH FUND INC	827,343.	827,343.
FMI COMMON STOCK FUND	649,719.	649,719.
DODGE & COX INTERNATIONAL STOCK FUND	472,747.	472,747.
FMI INTERNATIONALFUND	490,483.	490,483.
TOTAL TO FORM 990-PF, PART II, LINE 10B	4,812,630.	4,812,630.

FORM 990-PF

CORPORATE BONDS

STATEMENT 7

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
AT&T INC 3.875% 15 AUG 2021	25,783.	25,783.
AFLAC INC 3.625% 15 NOV 2024	115,062.	115,062.
AMGEN INC 2.2% 11 MAY 2020	145,036.	145,036.
APPLE INC 2.25% 23 FEB 2021	101,165.	101,165.
BP CAPITAL MARKETS AMERICA INC 3.79% 06 FEB 2024	26,441.	26,441.
BANK OF AMERICA CORP 4.183% 25 NOV 2027	54,509.	54,509.
CHUBB !NA HOLDINGS INC 3.35% 03 MAY 2026	109,885.	109,885.
CITIGROUP INC 3.75% 16 JUN 2024	53,442.	53,442.
COMCAST CORP 3% 01 FEB 2024	53,322.	53,322.
COMMONWEALTH EDISON CO 2.55% 15 JUN 2026		
STANDARD & POOR'S:A	53,173.	53,173.
DUKE ENERGY PROGRESS LLC 3.7% 01 SEP 2028	143,985.	143,985.
EXELON GENERATION CO LLC 4% 01 OCT 2020	20,075.	20,075.
GEORGIA POWER CO 2.4% 01 APR 2021	75,701.	75,701.
GEORGIA POWER CO 3.25% 01 APR 2026	26,889.	26,889.
GLAXOSMITHKLINE CAPITAL INC 3.875% 15 MAY 2028	34,897.	34,897.
GOLDMAN SACHS GROUP INC/THE 5.25% 27 JUL 2021	52,173.	52,173.
HP INC 3.75% 01 DEC 2020	50,667.	50,667.
HSBC HOLDINGS PLC 4.875% 14 JAN 2022	78,676.	78,676.
HEALTHPEAK PROPERTIES INC 3.875% 15 AUG 2024	51,445.	51,445.
HUNTIN GTON BANCSHARES INC/OH 2.3% 14 JAN 2022	101,423.	101,423.
INTEL CORP 2.45% 15 NOV 2029	31,781.	31,781.
INTERCONT INENTAL EXCHANGE INC 3.75% 01 DEC 2025	110,700.	110,700.
JPM ORGAN CHASE & CO 2.55% 01 MAR 2021	25,303.	25,303.
JPM ORGAN CHASE & CO 4.35% 15 AUG 2021	77,969.	77,969.
M ARSH & MCLENNAN COS INC 3.75% 14 MAR 2026	55,038.	55,038.
MCKESSON CORP 3.95% 16 FEB 2028	55,515.	55,515.
MI CROSOFT CORP 2% 08 AUG 2023	52,163.	52,163.
PHILLIPS 66 3.9% 15 MAR 2028	52,379.	52,379.
PUBLIC SERVICE ELECTRIC & GAS CO 3.5% 15 AUG 2020	30,155.	30,155.
RAYTHEON TECHNOLOGIES CORP 3.125% 04 MAY 2027		
STANDARD & POOR'S:A-	53,991.	53,991.
SCHLUMBERGER INVESTMENT SA 3.65% 01 DEC 2023	101,724.	101,724.
TD AMERITRADE HOLDING CORP 2.95% 01 APR 2022	128,363.	128,363.
TJX COS INC/THE 2.75% 15 JUN 2021	101,144.	101,144.
TARGET CORP 3.5% 01 JUL 2024	27,740.	27,740.
UNITEDHEALTH GROUP INC 3.75% 15 JUL 2025	55,980.	55,980.
VERIZON COMMUNICATIONS INC 5.15% 15 SEP 2023	142,035.	142,035.
VISA INC 2.2% 14 DEC 2020	126,002.	126,002.
VISA INC 2.75% 15 SEP 2027	162,626.	162,626.
VISA INC 3.15% 14 DEC 2025	110,397.	110,397.
WELLS FARGO & CO 3% 23 OCT 2026 STANDARD & POOR'S:A-	130,791.	130,791.
W ELLS FARGO & CO 4.125% 15 AUG 2023	106,707.	106,707.
TOTAL TO FORM 990-PF, PART II, LINE 10C	3,112,252.	3,112,252.

FORM 990-PF

PART VIII - LIST OF OFFICERS, DIRECTORS  
TRUSTEES AND FOUNDATION MANAGERS

STATEMENT 8

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
BRIAN KIEFFER P.O. BOX 44 MEDFORD, WI 54451	PRESIDENT 1.00	0.	0.	0.
KRISTI DEBRUYNE P.O. BOX 44 MEDFORD, WI 54451	VICE PRESIDENT 1.00	0.	0.	0.
DAVID FISH P.O. BOX 44 MEDFORD, WI 54451	SECRETARY/TREASURER 1.00	0.	0.	0.
JOELLYN DECESARE P.O. BOX 44 MEDFORD, WI 54451	MEMBER 1.00	0.	0.	0.
DAVID FLESSERT P.O. BOX 44 MEDFORD, WI 54451	MEMBER 1.00	0.	0.	0.
VICKI GJOVIK P.O. BOX 44 MEDFORD, WI 54451	MEMBER 1.00	0.	0.	0.
JULIA RUFF P.O. BOX 44 MEDFORD, WI 54451	MEMBER 1.00	0.	0.	0.
NANCY TOLL P.O. BOX 44 MEDFORD, WI 54451	MEMBER 1.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		0.	0.	0.

FORM 990-PF GRANT APPLICATION SUBMISSION INFORMATION STATEMENT 9  
PART XV, LINES 2A THROUGH 2D

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

ANNMARIE FOUNDATION  
PO BOX 44  
MEDFORD, WI 55451

EMAIL ADDRESS

INFO@ANNMARIEFOUNDATION.ORG

FORM AND CONTENT OF APPLICATIONS

PLEASE RETURN THE FOLLOWING TO THE FOUNDATION. EMAIL PREFERRED.

NAME OF HIGH SCHOOL

STUDENT'S NAME

MAILING ADDRESS

CITY, STATE, ZIP

PHONE NUMBER

EMAIL

ANY SUBMISSION DEADLINES

MAY 15TH

RESTRICTIONS AND LIMITATIONS ON AWARDS

1) IF A STUDENT IS RECEIVING SCHOLARSHIPS FROM OTHER SOURCES, ONLY THOSE STUDENTS RECEIVING LESS THAN \$1,000 SHOULD BE CONSIDERED FOR THE ANNMARIE SCHOLARSHIP. 2) WHILE WE RECOGNIZE THAT GOOD GRADES ARE AN INTEGRAL PART OF SELECTING A SCHOLARSHIP WINNER, WE DO NOT WANT TO RESTRICT THE SELECTION PROCESS TO ONLY THE TOP TEN OR TWENTY STUDENTS. IF THERE IS A STUDENT WHO HAS A GOOD ACADEMIC RECORD BUT HAS NOT BEEN IN THE "TOP TEN", WE WISH HIM/HER TO BE CONSIDERED ALONG WITH THE "TOP TEN". 3) EXTRA-CURRICULAR AND COMMUNITY ACTIVITIES SHOULD BE CONSIDERED ALONG WITH ACADEMICS.



## AnnMarie Grant Awards for Year Ended April 30, 2020

Recipient Name	Address	Amount	Relationship	Foundation Status	Purpose of grant or contribution
Stanley-Boyd School District	507 East 1st Ave Stanley WI 54768	\$500 00	N/A	public charities	cash donation
St Croix Central School District	1751 Broadway St Hammond WI 54015	\$1 436 00	N/A	public charities	quiet space room Mavic 2 Pro/DJI Care refresh commercial certification genetic simulator/blood pressure simulator/artery puncture arm STEM, shop improvements podcaster for video project STEAM makerspace sensory path
River Falls School District	852 E Division St River Falls WI 54022	\$3 020 00	N/A	public charities	Troun in the classroom project monitors and mounts elem non-fiction books tubs of fraction tiles
Rib Lake School District	1236 Kennedy St PO Box 278, Rib Lake WI 54470	\$3 700 00	N/A	public charities	DeWalt 20vlt drill and 2 scroll saws, performance scripts Literacy footprints guided reading square up register markerboard table barn cameras and bike
Prescott School District	1220 St Croix Street Prescott WI 54021	\$3 000 00	N/A	public charities	video production equipment We Both Read disability awareness and inclusion books back to school supplies early childhood parenting resources band saw
Phillips School District	PO Box 70, Phillips WI 54555	\$2 914 00	N/A	public charities	kaplan color block seating books games classroom library
New Richmond School District	701 East Eleventh St New Richmond WI 54017	\$4 280 00	N/A	public charities	Hero academy leveled readers
Menomonie School District	215 Pine Ave NE Menomonie WI 54751	\$4 548 00	N/A	public charities	Ultima 65 thermal roll laminator large storage cabinet and school supplies, 25 ukeleles
Medford School District	124 State Street Medford WI 54451	\$3 248 00	N/A	public charities	area rugs, magna-tiles individuals white boards portable sound system with wireless microphones camcorder
Hudson School District	644 Brakke Dr Hudson WI 54016	\$4 006 00	N/A	public charities	5 Lenovo 300e convertible laptops
Ellsworth School District	323 Hillcrest St Ellsworth WI 54011	\$2 200 00	N/A	public charities	pull and reveal animal skeletons science viewers learning shapes/activities rug cash register, plastic side sets celestron LCD digital microscopes
Eau Claire School District	500 Main Street Eau Claire, WI 54701	\$1 100 00	N/A	public charities	program materials for St Croix central healthy afterschool snacks and treats, prizes
Boyceville School District	1003 Tiffany Street Boyceville WI 54725	\$1 000 00	N/A	public charities	5x pottery wheel
St Mary School	257 S Washington Ave New Richmond, WI 54017	\$750 00	N/A	public charities	UCP program services
St Joseph School - Menomonie	910 Wilson Ave Menomonie WI 54751	\$1,807 00	N/A	public charities	children's play set materials for lake shelter pillows protectors mattress protectors nutnbullet and food dehydrator
Regis Catholic Schools	2728 Mall Drive, Eau Claire WI 54701	\$2 093 00	N/A	public charities	backpack food and vouchers multi-function color printer
McDonell Area Catholic Schools	1316 Bel Air Blvd Chippewa Falls WI 54729	\$1,883 00	N/A	public charities	metal recycling and dumpster fencing
Holy Rosary Catholic School	215 S Washington Ave Medford WI 54451	\$750 00	N/A	public charities	program supplies
Assumption Catholic School	901 West Prospect Street Durand WI 54736	\$1 400 00	N/A	public charities	office supplies training music and entertainment tires and auto parts uniforms clothing footwear, initial childcare
Abbotsford Christian Academy	4868 Cemetery Ave Abbotsford WI 54405	\$1 134 00	N/A	public charities	6 folding tables disc golf pins pads maps signs and hole signs drum line deficit supplies for support of CIM & CSE courses
JR Achievement - Upper Midwest (JAUM)	1745 University Avenue West St Paul MN 55104	\$450 00	N/A	public charities	Large format printer ink cartridges and paper rolls Science Olympiad startup support and Stand2Learn flexible learning desks & stools Second step early learning data driven physical wellness and educating lifelong learners
Collax Public Library	613 Main Street, PO Box 525 Collax WI 54730	\$520 00	N/A	public charities	Optic strapless heart rate monitor power pak plus and supplies for bat houses Healthy bodies healthy minds and fill a belly backpacks Sole Fitness elliptical trademark innovations 6" speed training hurdles crown sporting goods speed agility training hurdles
St Croix Center for the Arts (ArtBarn)	PO Box 37 1040 Oak Ridge Drive Osceola WI 54020	\$1 500 00	N/A	public charities	classroom books dry erase boards, printed journals teacher resource from ASCD VapeEducation licenses and pH sensor temp sensor spectrometer, cable
United Cerebral Palsy of West Central WI	206 Water Street Eau Claire, WI 54703	\$500 00	N/A	public charities	Books headphones and accessories Monarch butterfly curriculum CNC plasma cutting Air dryer and air compressor wireless microphones receivers body packs Smart board
The Bridge to Hope	2110 4th Ave NE, PO Box 700, Menomonie WI 54751	\$1,137 00	N/A	public charities	hokki stools digital cameras, ball chairs wobble chairs standing desks wireless amplification system MX Series Smart board SATA towers windows servers Siaggz octave xylophone and bass xylophone shelving unit magazine display unit computer table and chairs reading lounge bench cash for meal participants computers monitors with stands and MS office Program Support technical equipment rental fee pinning and pr materials for open house supplies
Moms and Dads Against Meth	PO Box 172 St Croix Falls, WI 54024	\$854 00	N/A	public charities	donation towards van with wheelchair lift
Five Loaves Food & Clothing Center Inc	PO Box 222, 144 W Third St New Richmond WI 54017	\$2 000 00	N/A	public charities	
Feed My People	2610 Alpine Road, Eau Claire WI 54703	\$1,500 00	N/A	public charities	
Chippewa Valley Habitat for Humanity	145 N Claremont Avenue, Eau Claire WI 54703	\$2 500 00	N/A	public charities	
Boys & Girls Club of Chippewa Valley	21 East Grant Ave, Chippewa Falls, WI 54729	\$1,250 00	N/A	public charities	
Best Buddies	10425 W North Ave, Suite 340, Wauwatosa WI 53226	\$1,000 00	N/A	public charities	
Baldwin Senior Center	400 Cedar Street, PO Box 744 Baldwin, WI 54002	\$250 00	N/A	public charities	
Assistance & Resource Center Inc	PO Box 223 River Falls WI 54022	\$2 000 00	N/A	public charities	
Woodville Senior Center	102 S Main St PO Box 58, Woodville, WI 54028	\$350 00	N/A	public charities	
OutdoorMore Inc	10614 24th Ave, Eau Claire WI 54701	\$1 800 00	N/A	public charities	
Chequamegon Band Booster	PO Box 255 Park Falls, WI 54552	\$3 000 00	N/A	public charities	
Somerset School District-PLTW	PO Box 100, Somerset WI 54025	\$4 000 00	N/A	public charities	
Medford School District-PLTW	124 West State St Medford WI 54451	\$3 520 00	N/A	public charities	
River Falls School District	852 E Division St River Falls WI 54022	\$3 920 00	N/A	public charities	
Rib Lake School District	1236 Kennedy St, PO Box 278 Rib Lake WI 54470	\$3 522 00	N/A	public charities	
Prescott School District	1220 St Croix Street Prescott WI 54021	\$3 250 00	N/A	public charities	
Prentice School District	PO Box 110 Prentice, WI 54556	\$3 000 00	N/A	public charities	
Phillips School District	PO Box 70, Phillips WI 54555	\$1,524 00	N/A	public charities	
New Richmond School District	701 East Eleventh St New Richmond WI 54017	\$5 245 00	N/A	public charities	
Medford School District	124 State Street, Medford WI 54451	\$901 00	N/A	public charities	
Hudson School District	644 Brakke Dr Hudson WI 54016	\$3 403 00	N/A	public charities	
Ellsworth School District	323 Hillcrest St Ellsworth WI 54011	\$3 700 00	N/A	public charities	
Boyceville School District	1003 Tiffany Street Boyceville WI 54725	\$800 00	N/A	public charities	
St Joseph School Menomonie	910 Wilson Ave Menomonie WI 54751	\$1 200 00	N/A	public charities	
McDonell Area Catholic Schools	1316 Bel Air Blvd Chippewa Falls WI 54729	\$1 668 00	N/A	public charities	
Holy Rosary Catholic School	215 S Washington Ave Medford WI 54451	\$1 200 00	N/A	public charities	
Assumption Catholic School	901 West Prospect Street Durand WI 54736	\$2 520 00	N/A	public charities	
Abbotsford Christian Academy	4868 Cemetery Ave Abbotsford WI 54405	\$1 040 00	N/A	public charities	
Western Taylor County Public Library	380 East Main PO Box 87 Gilman, WI 54433	\$1 000 00	N/A	public charities	
Pnce County Health Dept	104 S Eyder Avenue Phillips, WI 54555	\$1 000 00	N/A	public charities	
Friends of the Glenwood City Public Library	127 Pine Street Glenwood City WI 54013	\$2 206 00	N/A	public charities	
Medford Performing Arts	PO Box 13 Medford WI 54451	\$500 00	N/A	public charities	
Mabel Tainter Memorial Theater	205 Main Street East Menomonie WI 54751	\$2 000 00	N/A	public charities	
Chippewa Valley Museum	1204 E Half Moon Dr PO Box 1204 Eau Claire WI 54702	\$1 650 00	N/A	public charities	
Have A Heart	W10356 State Road 29 River Falls WI 54022	\$2 000 00	N/A	public charities	

EVOLVE Adoption Services (formerly HOPE Ad	5850 Omaha Ave North Oak Park Heights MN 55082	\$1 020 00	N/A	public charities	computer tech cords laptop bag external harddrive ipads boardmaker subscription case protectors and software picello & snap + coreFirst
BRIDGE for Community Life	651 Brakke Drive Hudson, WI 54016	\$1 500 00	N/A	public charities	laptop
Our Neighbors Place	122 West Johnson St River Falls WI 54022	\$800 00	N/A	public charities	board books
CHIP Infant Mental Health Team	900 W Claremont Ave Eau Claire WI 54703	\$500 00	N/A	public charities	climber/outdoor equipment
River Falls School District	852 E Division St River Falls WI 54022	\$3 000 00	N/A	public charities	
Rib Lake School District	1236 Kennedy St, PO Box 278 Rib Lake WI 54470	\$2 275 00	N/A	public charities	flexible furniture and seating and bridges invenbon set bulletin boards
Prescott School District	1220 St Croix Street, Prescott WI 54021	\$2 883 00	N/A	public charities	Onsite AED for MS glass sheet library 20 audio books Cnclt ipads
Phillips School District	PO Box 70 Phillips, WI 54555	\$5 148 00	N/A	public charities	bags of books books for read aloud leveled books Bead Rekenreks class sets 2 kindle ebook readers and cases Dynamic DNA kit
New Richmond School District	701 East Eleventh St New Richmond WI 54017	\$4 919 00	N/A	public charities	mobile 3 shelf card Makey Makey STEM toys mini Qs pnvacy shields and bins headphones
Menomonee School District	215 Pine Ave NE, Menomonee WI 54751	\$789 00	N/A	public charities	paratruper uniform
Medford School District	124 State Street Medford, WI 54451	\$2 600 00	N/A	public charities	supplies for civil engineering and architecture course iPads STRIVE human biology equipment
Hudson School District-PLTW	644 Brakke Dr Hudson, WI 54016	\$3 758 00	N/A	public charities	USCutter Titan vinyl cutter mobal vinyl floor rack apex wave climber
Hudson School District	644 Brakke Dr Hudson, WI 54016	\$3 276 00	N/A	public charities	4th grade field trip to Madison
Ellsworth School District	323 Hillcrest St Ellsworth, WI 54011	\$1 730 00	N/A	public charities	wireless handheld microphone lapel microphone
Chippewa Falls School District	1130 Miles St, Chippewa Falls, WI 54729	\$2 200 00	N/A	public charities	ipads with cases
Boyceville School District	1003 Tiffany Street, Boyceville, WI 54725	\$1 000 00	N/A	public charities	leveled books
St Peter s School	11370 County Hwy Q Chippewa Falls WI 54729	\$1 880 00	N/A	public charities	Sensory tables double sided storage illumination table magnetic blocks
St Mary School	257 S Washington Ave New Richmond WI 54017	\$1 450 00	N/A	public charities	rocking chairs outdoor seesaw round tables busy boards playground climber
St Joseph School - Menomonee	910 Wilson Ave Menomonee WI 54751	\$2,000 00	N/A	public charities	Ozobots Osmo coding ipad mini for Osmo coding Makey Makey kit, Snap circuit delux STEM simple machines snap circuit mobo
Regis Catholic Schools	2728 Mall Drive, Eau Claire WI 54701	\$2 000 00	N/A	public charities	magnetic alphabet maze color maze snap built site words magnet designer and cards magnetic counting maze classroom floor puzzles math instant learning center
McDonnell Area Catholic Schools	1316 Bel Air Blvd Chippewa Falls WI 54729	\$1 835 00	N/A	public charities	Osmo collaborative game for ipad Knex education kit, board games
Immanuel Lutheran School	420 E Lincoln Street, Medford WI 54451	\$1 000 00	N/A	public charities	publication of celebrate writing books materials for JA Biz town experience
Holy Rosary Catholic School	215 S Washington Ave Medford WI 54451	\$984 00	N/A	public charities	books for women with breast cancer and heart health
Abbotsford Chrsitian Academy	4868 Cemetery Ave, Abbotsford WI 54405	\$772 00	N/A	public charities	expanding life skills portion of family resource program
River Falls Public Library	140 Union Street River Falls, WI 54022	\$328 00	N/A	public charities	4-50 msc cables and 4xSennheiser boom mics
Literacy Volunteers of America-Chippewa Valley	510 S Farewell St, Eau Claire WI 54703	\$500 00	N/A	public charities	various sized exhibit cases
JR Achievement - Upper Midwest (JAUM)	1745 University Avenue West St Paul MN 55104	\$450 00	N/A	public charities	robotics starter bundle, tools and supplies
Health Alliance of Pnce County	PO Box 76, Phillips WI 54555	\$380 00	N/A	public charities	scnpts and music
Abiding Care Pregnancy Resource Center	220 N Main Street Medford	\$500 00	N/A	public charities	equipment and gear materials and msc
River City Chorale Inc	PO Box 592, Hudson WI 54016	\$1,307 00	N/A	public charities	jerseys warm up jackets
Polk County Historical Society	PO Box 41, Balsam Lake WI 54810	\$450 00	N/A	public charities	3laptop computers
Pablo Center at the Confluence	128 Graham Ave, Eau Claire WI 54701	\$2,979 00	N/A	public charities	facilitated lessons physical fitness training t-shirt healthy snacks
Medford Area Community Theatre	N3574 Martin Drive, Medford WI 54451	\$500 00	N/A	public charities	keyboard mattress toppers rocking chairs books legos lego table
New Richmond Fire Department	106 South Arch Ave, New Richmond, WI	\$3,000 00	N/A	public charities	backpacks
Menomonee Red Cedar Special Olympics	2660 County Road D, Woodville, WI 54028	\$2 880 00	N/A	public charities	starter fall jackets for athletes
Grace Place/Salvation Army	505 W 8th Street, New Richmond WI	\$1 647 00	N/A	public charities	Carhartt flame resistant ANSI stinped overalls mental health first aid course
Girls on the Run of the Northwoods	PO Box 1231, Minoqua, WI 54548	\$2 000 00	N/A	public charities	swing
Friendship Village, Inc	864 N Lake Ave, Phillips WI 54555	\$580 00	N/A	public charities	3 sets replacement flags
Chippewa Valley Vineyard Church	910 Bndgewater Ave, Chippewa Falls, WI 54729	\$1 000 00	N/A	public charities	digital analytical balance electronic scales
Chippewa Adult Special Olympics	616 Miles Street, Chippewa Falls	\$1 980 00	N/A	public charities	STEM & Makerspace resource
Boyceville Community Ambulance District	504 Race Street, Boyceville, WI	\$1,000 00	N/A	public charities	digital media and web design graphic design for students reading readiness SEL
YMCA of Hudson	2211 Vine Street, Hudson WI 54016	\$2,500 00	N/A	public charities	Apple imac seagate portable hard drive final cut proX
Healing Play Inc	1524 River Terrace, Prescott, WI 54021	\$2 000 00	N/A	public charities	bee curriculum startup materials recording studio equip
Park Falls Veterans s Alliance	684 5th Ave South Park Falls, WI 54552	\$391 00	N/A	public charities	chapter books, nonfiction writing texts math games, Science Olympiad in a box
Somerset School District	PO Box 100 Somerset WI 54025	\$800 00	N/A	public charities	Drums! legos writing tablets headphones osmo-genious kits and post prom
River Falls School District	852 E Division St, River Falls, WI 54022	\$3 423 00	N/A	public charities	VEX robotics robotics competition kits, band instruments and composer session
Rib Lake School District	1236 Kennedy St PO Box 278, Rib Lake WI 54470	\$3 086 00	N/A	public charities	science equip/materials books to support WI ACT31 goal
Prentice School District	PO Box 110 Prentice, WI 54556	\$2 600 00	N/A	public charities	STEM bins KEVA contraphon sets GEARS building set Geosmart magnet set
Phillips School District	PO Box 70, Phillips, WI 54555	\$3 221 00	N/A	public charities	science lab,marble run magnets science curriculum package makerboard dry erase erasers
New Richmond School District	701 East Eleventh St New Richmond WI 54017	\$4 675 00	N/A	public charities	Pearson enVision Math and Mathematics
Menomonee School District	215 Pine Ave NE Menomonee, WI 54751	\$2,125 00	N/A	public charities	10 Lenovo convertible laptops
Medford School District	124 State Street, Medford WI 54451	\$889 00	N/A	public charities	8 new computers Code hopper game Code master My First Coding book How to Code
Hudson School District	644 Brakke Dr, Hudson, WI 54016	\$5 797 00	N/A	public charities	books for children
Boyceville School District	1003 Tiffany Street Boyceville WI 54725	\$965 00	N/A	public charities	financial support
St Joseph School - Menomonee	910 Wilson Ave, Menomonee WI 54751	\$1 012 00	N/A	public charities	life skills modules and DVDs
McDonnell Area Catholic Schools	1316 Bel Air Blvd Chippewa Falls WI 54729	\$1 008 00	N/A	public charities	program materials
Holy Rosary Catholic School	215 S Washington Ave, Medford, WI 54451	\$900 00	N/A	public charities	books
Assumption Catholic School	901 West Prospect Street Durand WI 54736	\$2 800 00	N/A	public charities	Union soldier/officer hats coats and pants red/white/blue bunting
Abbotsford Chrsitian Academy	4868 Cemetery Ave, Abbotsford WI 54405	\$975 00	N/A	public charities	desktop computers upgraded to Windows 10 and Wind
Taylor County Literacy Council	124 W State Street, Medford WI 54451	\$500 00	N/A	public charities	Chesterfield Cuno Cabinet
Park Falls Public Library	121 4th Ave North, Park Falls WI 54552	\$815 00	N/A	public charities	food containers 3 and 5 gallon hot/cold beverage containers
Options for Women Menomonee	1002 8th St East Menomonee WI 54751	\$1 399 00	N/A	public charities	cooking classes for youth
JR Achievement - NW District	2004 Highland Ave Suite 2C, Eau Claire WI 54701	\$4,000 00	N/A	public charities	used minivan
Colby Public Library	505 W Spence Street PO Box 318 Colby WI 54421	\$750 00	N/A	public charities	HALO sleepsacks
Menomonee Theater Guild	502 2ns Street West Menomonee WI 54751	\$1 481 00	N/A	public charities	refrigerator/freezer
Eau Claire Children s Theater	1814 Oxford Ave Eau Claire WI 54703	\$1 496 00	N/A	public charities	
Clear Lake Historical Museum Inc	PO Box 2 450 5th Ave Clear Lake WI 54005	\$600 00	N/A	public charities	
Salvation Army of Taylor County	PO Box 36 Medford WI 54451	\$550 00	N/A	public charities	
Kinship of Polk County	PO Box 68 Balsam Lake WI 54810	\$500 00	N/A	public charities	
Hope Gospel Mission	PO Box 1127 2650 Mercantile Dr Eau Claire WI 54702	\$2 000 00	N/A	public charities	
Family Support Center (River Source Family Ce	403 N High Street Chippewa Falls WI 54729	\$765 00	N/A	public charities	
Counseling & Development Center	PO Box 71 598 Peterson Drive Phillips WI 54555	\$1 000 00	N/A	public charities	



Catholic Charities of the Diocese of LaCrosse	5608 S Barstow Eau Claire WI 54701	\$2 500 00	N/A	public charities	homeless shelter awning
Catawba Harmony Fire Department	N4508 High St PO Box 136 Catawba WI 54515	\$3,035 00	N/A		structural fire helmet with hood and gloves bunker
Saint Croix Sailing School	PO Box 732 Hudson WI 54016	\$600 00	N/A		coat pants & boots
Rib Lake PRIDE	W1782 Berry Ave Rib Lake WI 54470	\$1 000 00	N/A		opli blocks repair
Rib Lake Post Prom Committee	W1782 Berry Ave Rib Lake WI 54470	\$300 00	N/A	public charities	Catchers gear for ages 9-12 baseball and 9-12
New Richmond Area Centre	425 East 5th Street New Richmond WI 54017	\$247 00	N/A		softball baseball and softball helmets
Handy Andy Park Project	E 121 S 2nd Street PO Box 276 Spring Valley WI 54767	\$1 000 00	N/A		Smart TV mini fridge pizza ovens bluetooth
Medford Area Community Theatre	N3574 Martin Drive Medford WI 54451	(\$500 00)	N/A	public charities	speakers
					resource books activity materials and games
					swing set with adaptive swing for children with special
					needs
					scripts and music (STOP PAYMENT)
Grant Totals		\$254,154 00			