Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶ Do not enter social security numbers on this form as it may be made public.
▶ Go to *www.irs.gov/Form990PF* for instructions and the latest information.

OMB No. 1545-0052

2019

Open to Public Inspection

For calendar year 2019, or tax year beginning 07-01-2019 , and ending 06-30-2020

Name of foundation
ROBERT SCHALKENBACH FOUNDATION INC

A Employer identification number
13-1656331

Number and street (or P.O. box number if mail is not delivered to street address) 407 NASSAU STREET | Room/suite

B Telephone number (see instructions)
(973) 434-0005

City or town, state or province, country, and ZIP or foreign postal code
PRINCETON, NJ 08540

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 change

D 1. Foreign organizations, check here ▶ ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐

H Check type of organization: ☑ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col. (c), *line 16*) ▶$ 18,196,177

J Accounting method: ☐ Cash ☑ Accrual ☐ Other (specify)
(Part I, column (d) must be on cash basis.)

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

Part I **Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)*

			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc., received (attach schedule)	257,025			
	2	Check ▶ ☐ if the foundation is **not** required to attach Sch. B				
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	274,422	274,422	274,422	
	5a	Gross rents	2,564	2,564	2,564	
	b	Net rental income or (loss) 2,564				
	6a	Net gain or (loss) from sale of assets not on line 10	855,507			
	b	Gross sales price for all assets on line 6a 4,465,809				
	7	Capital gain net income (from Part IV, line 2)		855,507		
	8	Net short-term capital gain			61,402	
	9	Income modifications				
	10a	Gross sales less returns and allowances 18,699				
	b	Less: Cost of goods sold 18,933				
	c	Gross profit or (loss) (attach schedule)	-234		-234	
	11	Other income (attach schedule)	16,020	0	0	
	12	**Total.** Add lines 1 through 11	1,405,304	1,132,493	338,154	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc.	138,410	2,768	2,768	147,642
	14	Other employee salaries and wages	145,025	1,046	1,046	124,602
	15	Pension plans, employee benefits	49,208	633	633	71,174
	16a	Legal fees (attach schedule)	16,654	725	725	15,929
	b	Accounting fees (attach schedule)	21,224	925	925	19,821
	c	Other professional fees (attach schedule)	87,976	23,461	23,461	56,595
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	21,503	0	0	11,103
	19	Depreciation (attach schedule) and depletion	2,077	23	23	
	20	Occupancy	85,500	885	885	91,050
	21	Travel, conferences, and meetings	1,989	87	87	5,922
	22	Printing and publications				
	23	Other expenses (attach schedule)	188,977	1,761	1,761	177,230
	24	**Total operating and administrative expenses.** Add lines 13 through 23	758,543	32,314	32,314	721,068
	25	Contributions, gifts, grants paid	13,500			8,500
	26	**Total expenses and disbursements.** Add lines 24 and 25	772,043	32,314	32,314	729,568
	27	Subtract line 26 from line 12:				
	a	**Excess of revenue over expenses and disbursements**	633,261			
	b	**Net investment income** (if negative, enter -0-)		1,100,179		
	c	**Adjusted net income** (if negative, enter -0-)			305,840	

Part II **Balance Sheets** Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)

Section	Line	Description	Beginning of year (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
Assets	1	Cash—non-interest-bearing	213,184	171,537	171,537
	2	Savings and temporary cash investments		17,250	17,250
	3	Accounts receivable ▶ 26,557			
		Less: allowance for doubtful accounts ▶	9,873	26,557	26,557
	4	Pledges receivable ▶			
		Less: allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶			
		Less: allowance for doubtful accounts ▶			
	8	Inventories for sale or use	84,114		
	9	Prepaid expenses and deferred charges	6,316	15,791	15,791
	10a	Investments—U.S. and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)			
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment: basis ▶			
		Less: accumulated depreciation (attach schedule) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	12,105,074	12,285,963	12,285,963
	14	Land, buildings, and equipment: basis ▶ 10,965			
		Less: accumulated depreciation (attach schedule) ▶ 5,428	6,136	5,537	5,537
	15	Other assets (describe ▶)	5,741,462	5,673,542	5,673,542
	16	**Total assets** (to be completed by all filers—see the instructions. Also, see page 1, item I)	18,166,159	18,196,177	18,196,177
Liabilities	17	Accounts payable and accrued expenses	48,117	91,602	
	18	Grants payable			
	19	Deferred revenue		5,614	
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)	191,772	175,477	
	23	**Total liabilities**(add lines 17 through 22)	239,889	272,693	
Net Assets or Fund Balances		**Foundations that follow FASB ASC 958, check here ▶ ☑ and complete lines 24, 25, 29 and 30.**			
	24	Net assets without donor restrictions	12,201,870	12,272,704	
	25	Net assets with donor restrictions	5,724,400	5,650,780	
		Foundations that do not follow FASB ASC 958, check here ▶ ☐ and complete lines 26 through 30.			
	26	Capital stock, trust principal, or current funds			
	27	Paid-in or capital surplus, or land, bldg., and equipment fund			
	28	Retained earnings, accumulated income, endowment, or other funds			
	29	**Total net assets or fund balances** (see instructions)	17,926,270	17,923,484	
	30	**Total liabilities and net assets/fund balances** (see instructions)	18,166,159	18,196,177	

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	17,926,270
2	Enter amount from Part I, line 27a	2	633,261
3	Other increases not included in line 2 (itemize) ▶	3	3,426
4	Add lines 1, 2, and 3	4	18,562,957
5	Decreases not included in line 2 (itemize) ▶	5	639,473
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29	6	17,923,484

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.)
1 a	PUBLICLY TRADED SECURITIES			
b	CAPITAL GAIN DIVIDENDS	P		
c	CAPITAL GAIN DIVIDENDS	P		
d	PUBLICLY TRADED SECURITIES	P		
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	3,967,829		3,281,469	686,360
b	5,635			5,635
c	107,745			107,745
d	384,600		328,833	55,767
e				

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) Gains (Col. (h) gain minus col. (k), but not less than -0-) **or** Losses (from col.(h))
a				686,360
b				5,635
c				107,745
d				55,767
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	855,507
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) (see instructions). If (loss), enter -0- in Part I, line 8	3	61,402

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☑ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2018	687,304	11,835,446	0.058072
2017	627,365	11,907,610	0.052686
2016	696,062	11,092,270	0.062752
2015	652,232	10,754,838	0.060645
2014	665,535	11,305,336	0.058869

2	**Total** of line 1, column (d)	2	0.293024
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	0.058605
4	Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	12,168,046
5	Multiply line 4 by line 3	5	713,108
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	11,002
7	Add lines 5 and 6	7	724,110
8	Enter qualifying distributions from Part XII, line 4	8	731,046

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 ▶ ☐ 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 ▶ ☑ and enter 1% of Part I, line 27b		1	11,002
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	11,002
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	11,002
6	Credits/Payments:			
a	2019 estimated tax payments and 2018 overpayment credited to 2019	6a 11,600		
b	Exempt foreign organizations—tax withheld at source	6b		
c	Tax paid with application for extension of time to file (Form 8868)	6c 16,500		
d	Backup withholding erroneously withheld	6d 0		
7	Total credits and payments. Add lines 6a through 6d.		7	28,100
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.		8	20
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	17,078
11	Enter the amount of line 10 to be: **Credited to 2020 estimated tax** ▶ 17,078	**Refunded** ▶	11	0

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?	1a		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition).	1b		No
	*If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*			
c	Did the foundation file **Form 1120-POL** for this year?.	1c		No
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.*	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?.	4a		No
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?.	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least $5,000 in assets at any time during the year?*If "Yes," complete Part II, col. (c), and Part XV.*	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶NY			
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* .	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2019 or the taxable year beginning in 2019? See the instructions for Part XIV. If "Yes," complete Part XIV	9	Yes	
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses.*	10		No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	

Website address ▶WWW.SCHALKENBACH.ORG

14 The books are in care of ▶JOSEPHINE FAASS Telephone no. ▶(973) 434-0005

Located at ▶407 NASSAU STREET PRINCETON NJ ZIP+4 ▶08540

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

			Yes	No
16	At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		No
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign country ▶			

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. Yes No

1a During the year did the foundation (either directly or indirectly):

(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☑ No

(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?. ☐ Yes ☑ No

(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☑ No

(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☑ Yes ☐ 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)?. ☐ Yes ☑ 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.). ☐ Yes ☑ No

			Yes	No
b	If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b		No
	Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2019?.	1c		No

2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):

a At the end of tax year 2019, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2019?. ☐ Yes ☑ No
If "Yes," list the years ▶ 20____ , 20____ , 20____ , 20____

b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see instructions.)	2b		

c If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here.
▶ 20____ , 20____ , 20____ , 20____

3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?. ☐ Yes ☑ No

b	If "Yes," did it have excess business holdings in 2019 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969; **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2019.)*	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2019?	4b		No

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

			Yes	No
5a	During the year did the foundation pay or incur any amount to:			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ 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	5b		No
	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? ☑ 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?	6b		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?	7b		
8	Is the foundation subject to the section 4960 tax on payment(s) of more than $1,000,000 in remuneration or excess parachute payment during the year? ☐ Yes ☑ No			

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

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

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

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

(a) Name and address of each employee paid more than $50,000	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
PETER MINTER 407 NASSAU STREET PRINCETON, NJ 08540	IT MANAGER/WEBMASTER 40.00	70,795	2,765	0
GAIL LAMBERT 407 NASSAU STREET PRINCETON, NY 08540	OPERATIONS AND FINAN 30.00	51,654	7,870	0

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

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

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

(a) Name and address of each person paid more than $50,000	**(b)** Type of service	**(c)** Compensation
NONE		
Total number of others receiving over $50,000 for professional services. . . . . ▶		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 THE FOUNDATION PROMOTES THE SOCIAL AND ECONOMIC PHILOSOPHY OF HENRY GEORGE AND OTHER RELATED ECONOMISTS BY CONTRACTING THE SERVICES OF SCHOLARS, WRITERS AND OTHERS FOR PUBLISHING, RESEARCH AND OUTREACH PROJECTS.	116,377
2 THE FOUNDATION CONDUCTS EDUCATION AND OUTREACH ACTIVITIES TO PROMOTE THE SOCIAL AND ECONOMIC THEORY OF HENRY GEORGE AND OTHER RELATED ECONOMISTS.	163,683
3 THE FOUNDATION SELLS AND DISTRIBUTES BOOKS AND PUBLICATIONS TO PROMOTE THE SOCIAL AND ECONOMIC THEORY OF HENRY GEORGE AND OTHER RELATED ECONOMISTS.	162,595
4 THE FOUNDATION GIVES OFFICE SUPPORT TO THE JOURNAL OF ECONOMICS AND SOCIOLOGY, INC. WHICH PUBLISHES A JOURNAL 5 TIMES A YEAR IN THE INTEREST OF CONSTRUCTIVE SYNTHESIS IN THE SOCIAL SCIENCES	5,825

Part IX-B Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3 . . . . ▶	0

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	12,159,340
b	Average of monthly cash balances.		1b	128,896
c	Fair market value of all other assets (see instructions).		1c	65,110
d	**Total** (add lines 1a, b, and c).		1d	12,353,346
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	12,353,346
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).		4	185,300
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4		5	12,168,046
6	**Minimum investment return.** Enter 5% of line 5.		6	608,402

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

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

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26.	1a	729,568
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	1,478
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	731,046
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions.	5	11,002
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4.	6	720,044

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

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

	(a) Corpus	(b) Years prior to 2018	(c) 2018	(d) 2019
1 Distributable amount for 2019 from Part XI, line 7				
2 Undistributed income, if any, as of the end of 2019:				
a Enter amount for 2018 only.				
b Total for prior years: 20___ , 20___ , 20___				
3 Excess distributions carryover, if any, to 2019:				
a From 2014.				
b From 2015.				
c From 2016.				
d From 2017.				
e From 2018.				
f **Total** of lines 3a through e.				
4 Qualifying distributions for 2019 from Part XII, line 4: ▶ $ __________				
a Applied to 2018, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2019 distributable amount.				
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2019. *(If an amount appears in column (d), the same amount must be shown in column (a).)*				
6 **Enter the net total of each column as indicated below:**				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
b Prior years' undistributed income. Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b. Taxable amount —see instructions				
e Undistributed income for 2018. Subtract line 4a from line 2a. Taxable amount—see instructions				
f Undistributed income for 2019. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)				
8 Excess distributions carryover from 2014 not applied on line 5 or line 7 (see instructions) . . .				
9 **Excess distributions carryover to 2020.** Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9:				
a Excess from 2015. . . .				
b Excess from 2016. . . .				
c Excess from 2017. . . .				
d Excess from 2018. . . .				
e Excess from 2019. . . .				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2019, enter the date of the ruling. . . . . . . ▶

b Check box to indicate whether the organization is a private operating foundation described in section ☑ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2019	**(b)** 2018	**(c)** 2017	**(d)** 2016	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	305,840	279,203	252,894	221,876	1,059,813
b 85% of line 2a	259,964	237,323	214,960	188,595	900,841
c Qualifying distributions from Part XII, line 4 for each year listed	731,046	687,304	627,365	700,467	2,746,182
d Amounts included in line 2c not used directly for active conduct of exempt activities	8,500	13,500	12,000	7,000	41,000
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c	722,546	673,804	615,365	693,467	2,705,182
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test—enter:					
(1) Value of all assets					0
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					0
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.	405,601	394,515	396,921	369,743	1,566,780
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)					0
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					0
(3) Largest amount of support from an exempt organization					0
(4) Gross investment income					0

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).)

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.

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

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

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

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

c Any submission deadlines:

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

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient 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
a *Paid during the year*				
See Additional Data Table				
Total . . . . ▶ **3a**				8,500
b *Approved for future payment*				
NABU DEUTSCHLAND CHARITESTRASSE 3 BERLIN D10117 GM	N/A	FOREIGN - SEE STATEM	LAND VALUE TAX CAMPAIGN IN GERMANY	5,000
Total . . . . ▶ **3b**				5,000

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income (See instructions.)
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments. . . .					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities. . . .			14	274,422	
5 Net rental income or (loss) from real estate:					
a Debt-financed property.			16	2,564	
b Not debt-financed property.					
6 Net rental income or (loss) from personal property					
7 Other investment income.					
8 Gain or (loss) from sales of assets other than inventory			18	855,507	
9 Net income or (loss) from special events:					
10 Gross profit or (loss) from sales of inventory					-234
11 Other revenue:					
a MISCELLANEOUS REVENUE			01	1,020	
b CEMETERY PLOT SALE			01	15,000	
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e). .		0		1,148,513	-234

13 Total. Add line 12, columns (b), (d), and (e). 13 1,148,279
(See worksheet in line 13 instructions to verify calculations.)

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)
10	NET INCOME FROM DISTRIBUTION AND SALE OF BOOKS AND PUBLICATIONS
10	RELATED TO THE FOUNDATION'S EXEMPT PURPOSE

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

		Yes	No
1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501 (c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a Transfers from the reporting foundation to a noncharitable exempt organization of:			
(1) Cash.	1a(1)		No
(2) Other assets.	1a(2)		No
b Other transactions:			
(1) Sales of assets to a noncharitable exempt organization.	1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization.	1b(2)		No
(3) Rental of facilities, equipment, or other assets.	1b(3)		No
(4) Reimbursement arrangements.	1b(4)		No
(5) Loans or loan guarantees.	1b(5)		No
(6) Performance of services or membership or fundraising solicitations.	1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c		No

d If the answer to any of the above is "Yes," complete the following schedule. Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received.

(a) Line No.	**(b)** Amount involved	**(c)** Name of noncharitable exempt organization	**(d)** Description of transfers, transactions, and sharing arrangements

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527? ☐ Yes ☑ No

b If "Yes," complete the following schedule.

(a) Name of organization	**(b)** Type of organization	**(c)** Description of relationship

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

******	2021-03-11	******
Signature of officer or trustee	Date	Title

May the IRS discuss this return with the preparer shown below (see instr.) ☑ Yes ☐ No

Paid Preparer Use Only

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ▶ ☐	PTIN
LAUREN CRESCI				P01268493
Firm's name ▶ LUTZ AND CARR CPAS LLP				Firm's EIN ▶13-1655065
Firm's address ▶ 551 FIFTH AVENUE SUITE 400 NEW YORK, NY 10176				Phone no. (212) 697-2299

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, 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
GIB HALVERSON 407 NASSAU STREET PRINCETON, NJ 08540	PRESIDENT 15.00	0	0	0
RICHARD BIDDLE 407 NASSAU STREET PRINCETON, NJ 08540	VICE- PRESIDENT 2.00	0	0	0
FRED FOLDVARY 407 NASSAU STREET PRINCETON, NJ 08540	TREASURER 2.00	0	0	0
LEE HACHADOORIAN 407 NASSAU STREET PRINCETON, NJ 08540	SECRETARY 3.00	0	0	0
WYN ACHENBAUM 407 NASSAU STREET PRINCETON, NJ 08540	EXECUTIVE COMMITTEE 1.50	0	0	0
GREGG ERICKSON 407 NASSAU STREET PRINCETON, NJ 08540	EXECUTIVE COMMITTEE 1.50	0	0	0
KRIS FEDER 407 NASSAU STREET PRINCETON, NJ 08540	EXECUTIVE COMMITTEE 1.50	0	0	0
BILL BATT 407 NASSAU STREET PRINCETON, NJ 08540	DIRECTOR 1.00	0	0	0
JOHN BECK 407 NASSAU STREET PRINCETON, NJ 08540	DIRECTOR 1.00	0	0	0
THOMAS DANIELS 407 NASSAU STREET PRINCETON, NJ 08540	DIRECTOR (THROUGH 1/20) 0.50	0	0	0
FRANK DE JONG 407 NASSAU STREET PRINCETON, NJ 08540	DIRECTOR 1.00	0	0	0
BRIAN DIETRICK 407 NASSAU STREET PRINCETON, NJ 08540	DIRECTOR 1.00	0	0	0
WENDELL FITZGERALD 407 NASSAU STREET PRINCETON, NJ 08540	DIRECTOR 1.00	0	0	0
TED GWARTNEY 407 NASSAU STREET PRINCETON, NJ 08540	DIRECTOR 1.00	0	0	0
PAUL JUSTUS 407 NASSAU STREET PRINCETON, NJ 08540	DIRECTOR 1.00	0	0	0

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, 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
ARMANDA LARSON 407 NASSAU STREET PRINCETON, NJ 08540	DIRECTOR 1.00	0	0	0
MATT LEICHTER 407 NASSAU STREET PRINCETON, NJ 08540	DIRECTOR 1.00	0	0	0
ED MILLER 407 NASSAU STREET PRINCETON, NJ 08540	DIRECTOR 1.00	0	0	0
RICHARD NYMOEN 407 NASSAU STREET PRINCETON, NJ 08540	DIRECTOR 1.00	0	0	0
VICTOR RAMIREZ 407 NASSAU STREET PRINCETON, NJ 08540	DIRECTOR 1.00	0	0	0
NIC TIDEMAN 407 NASSAU STREET PRINCETON, NJ 08540	DIRECTOR 1.00	0	0	0
JOSEPHINE FAAS 407 NASSAU STREET PRINCETON, NJ 08540	EXECUTIVE DIRECTOR 40.00	138,410	18,338	0

Form 990PF Part XV Line 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
a *Paid during the year*				
HENRY GEORGE SCHOOL OF SAN FRANCISCO 189 ELLSWORTH STREET SAN FRANCISCO, CA 94110	N/A	PC	TO SUPPORT EXHIBIT AT THE LIBRARY- "WHO OWNS THE EARTH" EXHIBIT	3,500
LOYOLA LAW SCHOOL 919 ALBANY STREET BURNS 204 LOS ANGELES, CA 90015	N/A	PC	TO SUPPORT THE RESEARCH OF MICHAEL GUTTENTAG	5,000
Total . . . . ▶ **3a**				8,500

TY 2019 Accounting Fees Schedule

Name: ROBERT SCHALKENBACH FOUNDATION INC

EIN: 13-1656331

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	21,224	925	925	19,821

TY 2019 Depreciation Schedule

Name: ROBERT SCHALKENBACH FOUNDATION INC

EIN: 13-1656331

Depreciation Schedule

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
OFFICE FURNITURE, COMPUTERS AND EQUIPMENT		10,965	3,351	SL	5.000000000000	2,077	0	2,077	

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

TY 2019 Expenditure Responsibility Statement

Name: ROBERT SCHALKENBACH FOUNDATION INC

EIN: 13-1656331

Grantee's Name	Grantee's Address	Grant Date	Grant Amount	Grant Purpose	Amount Expended By Grantee	Any Diversion By Grantee?	Dates of Reports By Grantee	Date of Verification	Results of Verification
NABU DEUTSCHLAND	CHARITESTRASSE 3 BERLIN D10117 GM	2019-02-06	5,000	TO SUPPORT ORGANIZATION'S RESEARCH AND EDUCATION TO MAKE THE PUBLIC AND MEDIA OUTLETS AWARE OF MERITS OF LAND VALUE TAXATION IN GERMANY.	5,336	NONE KNOWN	AUGUST 6, 2020		

TY 2019 Investments - Other Schedule

Name: ROBERT SCHALKENBACH FOUNDATION INC

EIN: 13-1656331

Investments Other Schedule 2

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
VANGAURD INTER-TERM INVEST-GR ADM	FMV	442,797	442,797
VANGAURD SHORT-TERM INVEST-GR ADM	FMV	677,828	677,828
VANGAURD TOTAL INT'L STOCK INDEX	FMV	3,279,341	3,279,341
VANGAURD TOTAL STOCK MKT IDX ADM	FMV	4,658,663	4,658,663
VANGAURD TOTAL BOND MKT INDEX ADM	FMV	1,473,543	1,473,543
VANGAURD TOTAL INT'L BOND INDEX	FMV	1,159,636	1,159,636
VANGAURD HIGH YIELD CORP FUND ADM	FMV	241,076	241,076
VANGAURD LONG-TERM INVEST-GR ADM	FMV	353,079	353,079

TY 2019 Land, Etc. Schedule

Name: ROBERT SCHALKENBACH FOUNDATION INC

EIN: 13-1656331

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
OFFICE FURNITURE, COMPUTERS AND EQUIPMENT	10,965	5,428	5,537	

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TY 2019 Legal Fees Schedule

Name: ROBERT SCHALKENBACH FOUNDATION INC

EIN: 13-1656331

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	16,654	725	725	15,929

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TY 2019 Other Assets Schedule

Name: ROBERT SCHALKENBACH FOUNDATION INC

EIN: 13-1656331

Other Assets Schedule

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
INTEREST IN CHARITABLE REMAINDER TRUST	5,724,400	5,650,780	5,650,780
SECURITY DEPOSITS	17,062	22,762	22,762

TY 2019 Other Decreases Schedule

Name: ROBERT SCHALKENBACH FOUNDATION INC

EIN: 13-1656331

Description	Amount
UNREALIZED LOSS ON INVESTMENTS	565,853
CHANGE IN VALUE OF INTEREST IN CHARITABLE REMAINDER TRUST	73,620

TY 2019 Other Expenses Schedule

Name: ROBERT SCHALKENBACH FOUNDATION INC

EIN: 13-1656331

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TELEPHONE	7,891	86	86	7,683
SUPPLIES	12,037	131	131	8,052
OUTREACH	41,114	0	0	43,471
OFFICE EXPENSES	1,335	15	15	1,815
INSURANCE	7,118	77	77	3,067
POSTAGE & DELIVERY	990	11	11	58
FUNDRAISING EXPENSES	122	0	0	122
MISCELLANEOUS EXPENSES	15,056	656	656	14,434
WAREHOUSING & DISTRIBUTION	7,705	0	0	8,610
INVENTORY ADJUSTMENT	77,580	0	0	77,580

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MOVING EXPENSES	18,029	785	785	12,338

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TY 2019 Other Income Schedule

Name: ROBERT SCHALKENBACH FOUNDATION INC

EIN: 13-1656331

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
MISCELLANEOUS REVENUE	1,020		1,020
CEMETERY PLOT SALE	15,000		15,000

TY 2019 Other Increases Schedule

Name: ROBERT SCHALKENBACH FOUNDATION INC

EIN: 13-1656331

Description	Amount
PERIODIC PENSION RELATED CHANGES OTHER THAN PERIODIC PENSION COSTS	3,426

TY 2019 Other Liabilities Schedule

Name: ROBERT SCHALKENBACH FOUNDATION INC

EIN: 13-1656331

Description	Beginning of Year - Book Value	End of Year - Book Value
ACCRUED PENSION LIABILITY	176,371	146,994
DEFERRED RENT	15,401	11,233
TENANT SECURITY DEPOSIT	0	17,250

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	DLN: 93491097005291

TY 2019 Other Professional Fees Schedule

Name: ROBERT SCHALKENBACH FOUNDATION INC

EIN: 13-1656331

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT	23,077	23,077	23,077	0
PENSION CONSULTANT	7,869	343	343	8,791
OTHER PROFESSIONAL FEES	57,030	41	41	47,804

TY 2019 Taxes Schedule

Name: ROBERT SCHALKENBACH FOUNDATION INC

EIN: 13-1656331

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAXES	21,503	0	0	11,103

Schedule B
(Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, 990-EZ, or 990-PF.
▶ Go to *www.irs.gov/Form990* for the latest information.

OMB No. 1545-0047

2019

Name of the organization	Employer identification number
ROBERT SCHALKENBACH FOUNDATION INC	13-1656331

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 foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**
Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

☑ 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 other 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 990PF, 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
ROBERT SCHALKENBACH FOUNDATION INC

Employer identification number
13-1656331

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	NEILSON TRUST FUND A C/O JP MORGAN TRUST 10 S DEARBORN CHICAGO, IL 60603	$ 116,672	☑ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
2	NEILSON TRUST FUND B C/O JP MORGAN TRUST 10 S DEARBORN CHICAGO, IL 60603	$ 133,149	☑ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)

Name of organization	Employer identification number
ROBERT SCHALKENBACH FOUNDATION INC	13-1656331

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
-		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		$	

Name of organization
ROBERT SCHALKENBACH FOUNDATION INC

Employer identification number
13-1656331

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 information once. See instructions.) ▶ $ ____________

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

(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

(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

(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