

For calendar year 2020, or tax year beginning 01-01-2020, and ending 12-31-2020

Name of foundation THE WEST FOUNDATION INC		A Employer identification number 23-7416727	
Number and street (or P.O. box number if mail is not delivered to street address) 111 MONUMENT CIR STE 220 NO 220		Room/suite	B Telephone number (see instructions) (317) 972-0204
City or town, state or province, country, and ZIP or foreign postal code INDIANAPOLIS, IN 462045174		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here..... <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation ... <input type="checkbox"/>	
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶\$ 5,128,642	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> 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 <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (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)				
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	1,923	1,923		
	4 Dividends and interest from securities	48,373	48,373		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10 _____	244,103			
	b Gross sales price for all assets on line 6a _____ 1,636,094				
	7 Capital gain net income (from Part IV, line 2)		244,103		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances _____				
Operating and Administrative Expenses	b Less: Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	294,399	294,399		
	13 Compensation of officers, directors, trustees, etc.	94,247	0		0
	14 Other employee salaries and wages	95,997	0		0
	15 Pension plans, employee benefits	30,722	0		0
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	2,305	1,152		1,153
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	20,232	83		0
	19 Depreciation (attach schedule) and depletion	493	0		
	20 Occupancy	41,089	0		41,089
	21 Travel, conferences, and meetings				
	22 Printing and publications	155	0		155
	23 Other expenses (attach schedule)	109,162	55,114		54,048
	24 Total operating and administrative expenses. Add lines 13 through 23	394,402	56,349		96,445
	25 Contributions, gifts, grants paid	122,000			122,000
	26 Total expenses and disbursements. Add lines 24 and 25	516,402	56,349		218,445
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	-222,003			
	b Net investment income (if negative, enter -0-)		238,050		
	c Adjusted net income (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)		
		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing			
	2 Savings and temporary cash investments	310,493	207,548	207,548
	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 (attach schedule) (see instructions)	38,882	75,782	75,782
	7 Other notes and loans receivable (attach schedule) ▶ _____ 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 (attach schedule)			
	b Investments—corporate stock (attach schedule)	3,014,172	2,807,860	4,845,312
	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)			
	14 Land, buildings, and equipment: basis ▶ 79,659 Less: accumulated depreciation (attach schedule) ▶ 78,921	1,231	738	0
15 Other assets (describe ▶ _____)				
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	3,364,778	3,091,928	5,128,642	
Liabilities	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 (attach schedule)			
	22 Other liabilities (describe ▶ _____)			
	23 Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	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	400,000	400,000	
	27 Paid-in or capital surplus, or land, bldg., and equipment fund	3,470,985	3,470,985	
	28 Retained earnings, accumulated income, endowment, or other funds	-506,207	-779,057	
	29 Total net assets or fund balances (see instructions)	3,364,778	3,091,928	
30 Total liabilities and net assets/fund balances (see instructions) .	3,364,778	3,091,928		

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	3,364,778
2 Enter amount from Part I, line 27a	2	-222,003
3 Other increases not included in line 2 (itemize) ▶ _____	3	814
4 Add lines 1, 2, and 3	4	3,143,589
5 Decreases not included in line 2 (itemize) ▶ _____	5	51,661
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29 .	6	3,091,928

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a See Additional Data Table				
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 See Additional Data Table			
b			
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) 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	
a See Additional Data Table			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	<div> <div>If gain, also enter in Part I, line 7</div> <div>If (loss), enter -0- in Part I, line 7</div> </div>	2	244,103
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	

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income**SECTION 4940(e) REPEALED ON DECEMBER 20, 2019 - DO NOT COMPLETE**

1 Reserved			
(a) Reserved	(b) Reserved	(c) Reserved	(d) Reserved
2 Reserved		2	
3 Reserved		3	
4 Reserved		4	
5 Reserved		5	
6 Reserved		6	
7 Reserved		7	
8 Reserved ,		8	

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	Reserved.	1	3,309
c	All other domestic foundations enter 1.39% 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	3,309
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	3,309
6	Credits/Payments:		
a	2020 estimated tax payments and 2019 overpayment credited to 2020	6a	7,000
b	Exempt foreign organizations—tax withheld at source	6b	0
c	Tax paid with application for extension of time to file (Form 8868)	6c	0
d	Backup withholding erroneously withheld	6d	0
7	Total credits and payments. Add lines 6a through 6d.	7	7,000
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached.	8	0
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	3,691
11	Enter the amount of line 10 to be: Credited to 2021 estimated tax 3,320 Refunded	11	371

Part VII-A Statements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	Yes	No
1a			No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition). <i>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.</i>		No
1b			No
c	Did the foundation file Form 1120-POL for this year?		No
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? <i>If "Yes," attach a detailed description of the activities.</i>	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? <i>If "Yes," attach a conformed copy of the changes</i>	3	No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	No
4b	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? <i>If "Yes," attach the statement required by General Instruction T.</i>	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? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	7	Yes
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ► IN		
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? <i>If "No," attach explanation.</i>	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 2020 or the taxable year beginning in 2020? See the instructions for Part XIV. <i>If "Yes," complete Part XIV</i>	9	No
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	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? Website address ▶ <u>N/A</u>	13	Yes	
14	The books are in care of ▶ <u>DANI ROTH</u> Telephone no. ▶ <u>(317) 972-0204</u>			

Located at ▶ 111 MONUMENT CIRCLE STE 220 INDIANAPOLIS INZIP+4 ▶ 46204

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here ▶ <input type="checkbox"/>			
	and enter the amount of tax-exempt interest received or accrued during the year ▶ 15			
16	At any time during calendar year 2020, 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	Yes	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? <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 <input type="checkbox"/>	1b	
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2020?	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 2020, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2020? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If "Yes," did it have excess business holdings in 2020 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 2020.)	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 2020?	4b	No

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:		Yes	No
(1)	Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5)	Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	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	
	Organizations relying on a current notice regarding disaster assistance check here.	<input checked="" type="checkbox"/>		
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? If "Yes," attach the statement required by Regulations section 53.4945–5(d).	<input type="checkbox"/> Yes <input type="checkbox"/> No		
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	6b	No
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	7b	
b	If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?			
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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		

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

1 List all officers, directors, trustees, 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
EMILY WEST	EXECUTIVE DIRECTOR	0	0	0
332 N EAST ST INDIANAPOLIS, IN 46202	40.00			
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 SEE PART XV FOR LIST OF CONTRIBUTIONS	122,000
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year 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	4,308,963
b	Average of monthly cash balances.	1b	166,623
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	4,475,586
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	4,475,586
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	67,134
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	4,408,452
6	Minimum investment return. Enter 5% of line 5.	6	220,423

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	220,423
2a	Tax on investment income for 2020 from Part VI, line 5.	2a	3,309
b	Income tax for 2020. (This does not include the tax from Part VI.).	2b	
c	Add lines 2a and 2b.	2c	3,309
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	217,114
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	217,114
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	217,114

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	218,445
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	218,445
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	218,445

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 2019	(c) 2019	(d) 2020
1 Distributable amount for 2020 from Part XI, line 7				217,114
2 Undistributed income, if any, as of the end of 2020:				
a Enter amount for 2019 only.			0	
b Total for prior years: 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2020:				
a From 2015.	616,165			
b From 2016.	460,577			
c From 2017.	459,386			
d From 2018.	350,650			
e From 2019.	232,257			
f Total of lines 3a through e.	2,119,035			
4 Qualifying distributions for 2020 from Part XII, line 4: ► \$ 218,445				
a Applied to 2019, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2020 distributable amount.				217,114
e Remaining amount distributed out of corpus	1,331			
5 Excess distributions carryover applied to 2020. (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	2,120,366			
b Prior years' undistributed income. Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b. Taxable amount—see instructions.		0		
e Undistributed income for 2019. Subtract line 4a from line 2a. Taxable amount—see instructions.			0	
f Undistributed income for 2021. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020.				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2015 not applied on line 5 or line 7 (see instructions).	616,165			
9 Excess distributions carryover to 2021. Subtract lines 7 and 8 from line 6a.	1,504,201			
10 Analysis of line 9:				
a Excess from 2016.	460,577			
b Excess from 2017.	459,386			
c Excess from 2018.	350,650			
d Excess from 2019.	232,257			
e Excess from 2020.	1,331			

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 2020, 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)

2a 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			(e) Total
	(a) 2020	(b) 2019	(c) 2018	(d) 2017	
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. Subtract line 2d from line 2c					
3 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(j)(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).)

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 e-mail address of the person to whom applications should be addressed:

EMILY WEST
332 N EAST STREET
INDIANAPOLIS, IN 46202
(317) 972-0204

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

NO SPECIAL FORMAT IS REQUIRED

c Any submission deadlines:

NONE

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

NO RESTRICTIONS. TO SUPPORT THE SUSTAINABLE EFFORTS OF INTERNATIONAL DEVELOPMENT ORGANIZATIONS IN ELIMINATING ALL TYPES OF POVERTY BY FOSTERING COMMUNITY DEVELOPMENT, PARTICULARLY AT THE GRASSROOTS LEVEL.

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> See Additional Data Table				
Total			▶ 3a	122,000
b <i>Approved for future payment</i>				
Total			▶ 3b	0

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions.)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
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				14	1,923	
4 Dividends and interest from securities.				14	48,373	
5 Net rental income or (loss) from real estate:						
a Debt-financed property.						
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	244,103	
9 Net income or (loss) from special events:						
10 Gross profit or (loss) from sales of inventory						
11 Other revenue: a _____						
b _____						
c _____						
d _____						
e _____						
12 Subtotal. Add columns (b), (d), and (e).			0		294,399	0
13 Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calculations.)				13	294,399	294,399

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

[illegible]

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

		Yes	No
--	--	-----	----

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1a(1)	No
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1a(2)		No
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--	--	--

1b(1)	No
--------------	-----------

1b(2)		No
--------------	--	-----------

1b(3)		No
--------------	--	-----------

1b(4)		No
--------------	--	-----------

1b(5)		No
--------------	--	-----------

1b(6)		No
--------------	--	-----------

1c		No
-----------	--	-----------

value
ue[illegible]

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.

* * * * *

2021-08-30

May the IRS discuss this return with the preparer shown below

(see instr.) ☒ **Yes** ☐ **No**

Signature of officer or trustee

Date _____

Title

**Paid
Preparer
Use Only**

Print/Type preparer's name SUSIE M KEATON CPA	Preparer's Signature	Date 2021-08-30	Check if self-employed <input type="checkbox"/>	PTIN P00765420
Firm's name ► SOMERSET CPAS AND ADVISORS				Firm's EIN ► 20-1717681
Firm's address ► 3925 RIVER CROSSING PARKWAY STE 100 INDIANAPOLIS, IN 46240				Phone no. (317) 472-2200

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

List and describe the kind(s) of property sold (e.g., real estate, (a) 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.)
WELLS FARGO - 1934	P	2020-04-29	2020-12-31
WELLS FARGO - 1934	P	2019-09-12	2020-12-31
WELLS FARGO - 5584	P	2020-03-27	2020-12-31
WELLS FARGO - 5584	P	2020-09-09	2020-12-31
WELLS FARGO - 6343	P	2020-02-06	2020-12-31
WELLS FARGO - 6343	P	2019-12-12	2020-12-31
WELLS FARGO - 1702	P	2019-07-24	2020-12-31
WELLS FARGO - 6873	P	2020-04-08	2020-12-31
WELLS FARGO - 6873	P	2019-12-11	2020-12-31
RAYMOND JAMES - 5235	P	1994-05-01	2020-09-24

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
148,059		150,148	-2,089
180,171		113,192	66,980
28,601		27,256	1,345
339,438		208,193	131,244
478,051		519,728	-41,676
259,237		212,320	46,917
59,230		61,025	-1,795
6,382		5,586	796
136,885		94,544	42,341
40			40

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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) 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	
			-2,089
			66,980
			1,345
			131,244
			-41,676
			46,917
			-1,795
			796
			42,341
			40

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
EMILY WEST 332 N EAST STREET INDIANAPOLIS, IN 46202	EXECUTIVE DIRECTOR 40.00	94,247	0	0
REBEKAH JONES 4313 E 108TH ST KANSAS CITY, MO 64137				
SUZANNA BLOOM 367 LAKE VIEW ROAD HAYDEN, CO 81639	DIRECTOR 0.00	0	0	0
DANIELE ROTH-LARRISON 266 S AUDUBON RD INDIANAPOLIS, IN 46219				
JORDAN DAVIS 104 EAST KIRKWOOD AVE APT 102 BLOOMINGTON, IN 48408	DIRECTOR 0.00	0	0	0
DEBRA DES VIGNES 1701 N DELAWARE ST 4 INDIANAPOLIS, IN 46202		41,269	0	0
	PROGRAM AND COMMUNICATIONS OFFICER 40.00			

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
COMPANION COMMUNITY DEVELOPMENT ALTERNATIVES 5055 W 15TH STREET INDIANAPOLIS, IN 46224		PUBLIC CHARITY	UNRESTRICTED SOLAR POWER AND CLEAN WATER PROJECTS IN SALVADORAN AND NICARAGUAN VILLAGES	7,000
STRATEGIES FOR INTERNATIONAL DEVELOPMENT (SID) 330 PENNSYLVANIA AVENUE SE SUITE 304 WASHINGTON, DC 20003		PUBLIC CHARITY	REGIONAL TRAINING STRATEGY POVERTY GRADUATION FOR FARMERS GUATEMALA	10,000
TRICKLE UP 104 WEST 27TH ST 12TH FLOOR NEW YORK, NY 10001		PUBLIC CHARITY	ADAPTIVE SOCIAL PROTECTION FIVE WEST AFRICAN COUNTRIES POVERTY GRADUATION PROGRAM	13,000
Total ▶ 3a				122,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ROTARY INTERNATIONALPO BOX 141 NOBLESVILLE, IN 46061		PUBLIC CHARITY	QDRAT SCHOOL AND FEMALE LITERACY AND VOCATIONAL TRAINING IN NORTHERN AFGHANISTAN	12,500
TRICKLE UP 104 WEST 27TH ST 12TH FLOOR NEW YORK, NY 10001		PUBLIC CHARITY	ADAPTIVE SOCIAL PROTECTION FIVE WEST AFRICAN COUNTRIES POVERTY GRADUATION PROGRAM	7,000
COOPERATIVE FOR EDUCATION 2300 MONTANA AVENUE SUITE 301 CINCINNATI, OH 45211		PUBLIC CHARITY	UNRESTRICTED OPERATING TEXTBOOK, COMPUTER, READING, AND YOUTH DEVELOPMENT PROGRAMS	10,000
Total ▶ 3a				122,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SHARED INTEREST 121 WEST 27TH STREET SUITE 805 NEW YORK, NY 10001		PUBLIC CHARITY	PLAN 2020, A FIVEYEAR STRATEGIC PLAN	10,000
SMILES FOREVERPO BOX 217 RENTON, WA 98057		PUBLIC CHARITY	DENTAL HYGIENE IN VILLA TUNARI, BOLIVIA MOBILE CLINIC AND S.D.F. TREATMENT PROJECT	10,000
MOTHERS 2 MOTHERS 7441 WEST SUNSET BOULEVARD SUITE 205 LOS ANGELES, CA 90046		PUBLIC CHARITY	UNRESTRICTED EMPOWER WOMEN TO ELIMINATE PEDIATRIC AIDS	7,500
Total ▶ 3a				122,000

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
PLANT WITH PURPOSE 4747 MORENA BOULEVARD SUITE 100 SAN DIEGO, CA 92117		PUBLIC CHARITY	AGRICULTURAL TRAINING PROGRAM AND COMPANION SUMMIT	10,000
TECHNOSERVE 1777 NORTH KENT STREET SUITE 1100 ARLINGTON, VA 22209		PUBLIC CHARITY	SMALLHOLDER WOMEN COCOA FARMERS IN PERU	15,000
UBUNTU PATHWAYS 32 BROADWAY STE 414 NEW YORK, NY 10004		PUBLIC CHARITY	PATHWAYS PROGRAM, SOUTH AFRICA	10,000
Total ▶ 3a				122,000

TY 2020 Accounting Fees Schedule**Name:** THE WEST FOUNDATION INC**EIN:** 23-7416727

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
SOMERSET, TAX PREPARATION	2,305	1,152		1,153

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

TY 2020 Depreciation Schedule

Name: THE WEST FOUNDATION INC

EIN: 23-7416727

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
FURNITURE - LOBBY	1996-06-11	6,220	6,220	200DB	7.0000000000000	0	0		
FURNITURE - CONFERENCE	1996-04-15	8,908	8,908	200DB	7.0000000000000	0	0		
FURNITURE - WORK A	1996-03-20	1,944	1,944	200DB	7.0000000000000	0	0		
FURNITURE - PMW OFFICE	1996-05-25	3,637	3,637	200DB	7.0000000000000	0	0		
FURNITURE - SRW OFFICE	1996-06-10	11,716	11,716	200DB	7.0000000000000	0	0		
FURNITURE - EAW OFFICE	1996-04-30	11,045	11,045	200DB	7.0000000000000	0	0		
TELEPHONES	1996-03-01	2,100	2,100	200DB	5.0000000000000	0	0		
FURNITURE - OTHER	1996-09-15	2,002	2,002	200DB	7.0000000000000	0	0		
NCES	1996-10-10	1,245	1,245	200DB	5.0000000000000	0	0		
TABLETOPS	1997-05-09	859	859	200DB	7.0000000000000	0	0		
ARMOIRE	1997-05-22	1,574	1,574	200DB	7.0000000000000	0	0		
BUSINESS MACHINES	1997-06-03	6,705	6,705	200DB	5.0000000000000	0	0		
COMPUTER AND INSTALLATION	2005-01-01	13,153	13,153	SL	5.0000000000000	0	0		
REFRIGERATOR	2017-07-01	612	218	200DB	5.0000000000000	35	0		
STANDING DESK	2017-07-01	395	140	200DB	5.0000000000000	23	0		
4 COMPUTERS	2017-07-01	6,662	2,372	200DB	5.0000000000000	384	0		
PRINTER	2017-07-01	882	314	200DB	5.0000000000000	51	0		

TY 2020 Investments Corporate Stock Schedule

Name: THE WEST FOUNDATION INC
 EIN: 23-7416727

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ALBEMARLE CORP	56,311	56,648
ALPHABET INC	41,287	49,053
AMEDISYS INC	50,770	92,106
ARTHUR J GALLAGHER & CO	44,464	74,721
CADENCE DESIGN SYSTEMS INC	42,280	90,590
CARRIER GLOBAL CORP	56,226	55,298
CATALENT INC	47,055	92,518
DAVITA INC	41,172	59,757
DECKERS OURDOOR CORP	49,539	117,293
KEYSIGHT TECHS INC	49,951	75,820
KLA CORP	45,822	74,566
LAUDER ESTEE COS INC	44,101	65,749
MSCI INC	21,321	82,162
NEXTERA ENERGY INC	45,014	58,325
OLD DOMINION FREIGHT LINE INC	55,250	52,894
RELIANCE STEEL & ALUMINUM CO	48,123	47,900
RH	58,625	59,968
STERIS PLC	35,806	45,111
TARGET CORP	48,572	78,732
TREX COMPANY INC	56,541	65,804
ZEBRA TECHNOLOGIES	48,380	88,396
ACCENTURE PLC IRELAND SHARES CLASS A	7,735	16,195
ADOBE SYSTEMS INC	21,163	25,506
AIR PRODUCTS & CHEMICALS INC	17,582	17,759
ALPHABET INC NON VOTING CAP STK CL C	41,744	77,083
AMERICAN TOWER CORP	38,794	56,564
AMPHENOL CORP NEW CL A	31,633	44,723
AON PLC CLASS A	14,676	20,071
CHECK POINT SOFTWARE TECH LTD	5,610	6,646
COSTCO WHSL CORP	14,956	18,839

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
CROWN CASTLE INTERNATIONAL CORP	13,938	20,376
DANAHER CORP	27,635	73,306
DOLLAR GENERAL CORP	23,135	65,614
ECOLAB INC	37,227	61,230
ELECTRONIC ARTS INC	7,998	14,647
FIDELITY NATIONAL INFORMATION SVCS	26,580	31,970
FISERV INC	32,716	50,326
GARTNER INC	23,284	31,718
IDEX CORP	14,360	30,278
IHS MARKIT LTD	26,683	42,669
INTERCONTINENTAL EXCHANGE	35,063	59,144
INTUIT INC	17,764	49,001
INTUITIVE SURGICAL INC	8,004	9,817
LABORATORY CORP OF AMER HLDGS	18,520	25,444
LAUDER ESTEE COS INC CL A	10,209	31,677
LINDE PLC	26,871	43,216
LOWES COMPANIES INC	12,883	27,608
MARSH AND MC LENNAN COMPANIES INC	20,241	32,292
MASTERCARD INC CL A	15,766	58,895
MICROSOFT CORP	20,797	72,509
MONDELEZ INTL INC	12,657	17,541
MOODY'S CORP	8,517	8,707
NIKE INC CLASS B	11,326	26,879
O'REILLY AUTOMOTIVE INC	17,242	22,629
PEPSICO INCORPORATED	11,640	17,055
S&P GLOBAL INC	9,065	12,820
SCHWAB CHARLES CORP NEW	10,424	17,291
STARBUCKS CORP	16,053	30,703
TE CONNECTIVITY LTD	16,660	21,914
TEXAS INSTRUMENTS INC	8,417	17,890

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
THERMO FISHER SCIENTIFIC INC	27,661	74,059
TJX COS NEW	33,957	50,739
VERISK ANALYTICS INC	27,194	58,333
VISA INC CLASS A	34,693	80,711
XYLEM INC	27,059	41,530
ZOETIS INC CLASS	17,938	59,084
ADOBE SYSTEMS INC	3,537	19,505
ADVANCED MICRO DEVICES INC	12,246	12,381
ALIBABA GRP HOLDING	13,883	13,033
AMAZON COM INC	8,133	45,597
AMPHENOL CORP NEW CL A	9,154	10,069
ANSYS INC	7,662	9,823
APPLE INC	7,557	18,046
ASML HOLDING	4,443	5,853
BLACKSTONE GROUP INC	18,828	20,415
CHIPOTLE MEXICAN GRILL	8,227	9,707
CINTAS CORP	13,807	20,147
COSTAR GROUP INC	11,869	25,880
DANAHER CORP	10,365	16,883
ECOLAB INC	4,856	6,924
EDWARDS LIFESCIENCE CORP	5,119	17,516
EPAM SYSTEMS INC	7,511	12,542
EURONET WORLDWIDE INC	12,698	14,057
FASTENAL CO	8,786	9,473
FLEETCOR TECHNOLOGIES	5,063	5,184
GOLDMAN SACHS GROUP INC	11,723	13,713
HDFC BANK LTD	4,942	5,130
IDEXX LABORATORIES INC	5,273	23,494
IHS MARKIT LTD	4,169	7,276
INTERCONTINENTAL EXCHANGE	5,881	8,647

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
INTUIT INC	2,762	5,318
INTUITIVE SURGICAL INC COM NEW	7,883	18,816
LULULEMON ATHLETICA INC	8,282	12,877
MARTIN MARIETTA MATERIALS INC	13,095	15,618
MASTERCARD INC CL A	7,745	31,411
MICROSOFT CORP	6,493	13,123
MONOLITHIC POWER SYSTEMS INC	12,305	22,340
NVIDIA CORP	7,731	14,622
PAYPAL HOLDINGS INC	9,653	18,970
ROPER TECHNOLOGIES INC	8,080	11,639
S&P GLOBAL INC	5,444	19,395
SBA COMMUNICATIONS CORP	5,706	5,925
SHERWIN WILLIAMS CO	8,203	20,577
TELEFLEX INCORPORATED	4,536	5,350
TENCENT HOLDINGS LTD	11,944	18,188
THERMO FISHER SCIENTIFIC INC	2,889	6,987
TREX COMPANY INC	12,460	18,167
TWILIO INC	7,454	10,155
TYLER TECHNOLOGIES INC	5,382	11,350
UNITED RENTALS INC	11,691	15,074
UNITEDHEALTH GROUP INC	2,818	4,559
ZOETIS INC CLASS	9,928	16,385
3M CO	9,086	13,459
ABBOTT LABORATORIES	11,908	28,686
AFLAC INC	12,585	17,566
AIR PRODUCTS & CHEMICALS INC	7,206	21,311
AMERICAN TOWER CORP	16,514	15,039
AMGEN INC	13,915	19,773
ANALOG DEVICES INC	8,842	27,035
APPLE INC	15,102	44,584

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
AT & T INC	10,152	8,369
AUTOMATIC DATA PROCESSING	8,297	23,082
BECTON DICKINSON & CO	8,877	21,519
BLACKROCK INC	9,840	20,203
CHEVRON CORPORATION	12,300	8,614
CHUBB CORP	12,557	17,547
CISCO SYSTEMS INC	13,320	18,303
CLOROX COMPANY	7,423	16,154
COLGATEPALMOLIVE CO	8,846	12,741
COMCAST CORP NEW CL A	17,983	22,375
EATON VANCE CORP NON VTG	5,408	8,967
EMERSON ELECTRIC CO	11,446	14,708
EVERSOURCE ENERGY	8,827	17,475
FACTSET RESEARCH SYSTEMS INC	6,118	18,288
GENL DYNAMICS CORP COM	8,428	15,031
ILLINOIS TOOL WORKS INC	9,144	25,893
JOHNSON & JOHNSON	20,898	30,060
JPMORGAN CHASE & CO	18,701	22,746
LINDE PLC	13,076	21,081
LOWES COMPANIES INC	10,946	37,559
L3HARRIS TECHNOLOGIES INC	6,292	21,359
MCDONALDS CORP	7,348	16,308
MEDTRONIC PLC	16,133	24,951
MICROSOFT CORP	11,978	74,511
NEXTERA ENERGY INC	10,245	35,720
NIKE INC CLASS B	7,944	18,533
NORFOLK SOUTHERN CORP	8,605	26,137
NOVARTIS AG SPON ADR	7,724	11,143
PAYCHEX INC	8,741	20,406
PEPSICO INCORPORATED	12,980	20,169

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
PHILLIPS 66	19,080	18,184
PROCTER & GAMBLE CO	12,834	20,454
RAYTHEON TECHNOLOGIES CORP	6,420	8,081
TARGET CORP	8,943	21,890
UNITEDHEALTH GROUP INC	16,252	21,391
US BANCORP NEW	12,170	10,855
V F CORPORATION	9,548	17,765
WALMART STORES INC	12,021	21,767
WEC ENERGY GROUP INC	12,586	18,406
ACCENTURE PRC IRELAND	13,375	24,554

TY 2020 Land, Etc. Schedule

Name: THE WEST FOUNDATION INC

EIN: 23-7416727

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
FURNITURE - LOBBY	6,220	6,220	0	
FURNITURE - CONFERENCE	8,908	8,908	0	
FURNITURE - WORK A	1,944	1,944	0	
FURNITURE - PMW OFFICE	3,637	3,637	0	
FURNITURE - SRW OFFICE	11,716	11,716	0	
FURNITURE - EAW OFFICE	11,045	11,045	0	
TELEPHONES	2,100	2,100	0	
FURNITURE - OTHER	2,002	2,002	0	
NCES	1,245	1,245	0	
TABLETOPS	859	859	0	
ARMOIRE	1,574	1,574	0	
BUSINESS MACHINES	6,705	6,705	0	
COMPUTER AND INSTALLATION	13,153	13,153	0	
REFRIGERATOR	612	559	53	
STANDING DESK	395	361	34	
4 COMPUTERS	6,662	6,087	575	
PRINTER	882	806	76	

TY 2020 Other Decreases Schedule

Name: THE WEST FOUNDATION INC
EIN: 23-7416727

Description	Amount
ADJUSTMENT FOR DIFFERENCE IN COST BASIS	51,661

TY 2020 Other Expenses Schedule**Name:** THE WEST FOUNDATION INC**EIN:** 23-7416727**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ADR FEES	5	5		0
BANK FEES	170	0		170
BROKER FEES	55,109	55,109		0
CONSULTING	4,908	0		4,908
DUES & SUBSCRIPTIONS	22,901	0		22,901
EQUIPMENT	168	0		168
LIABILITY INSURANCE	2,467	0		2,467
MISCELLANEOUS	431	0		431
OFFICE SUPPLIES	513	0		513
PAYCHEX EXPENSE	9,172	0		9,172

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
POSTAGE	255	0		255
TELEPHONE & INTERNET	2,593	0		2,593
PARKING	9,720	0		9,720
SPONSORSHIPS	750	0		750

TY 2020 Other Increases Schedule**Name:** THE WEST FOUNDATION INC**EIN:** 23-7416727**Other Increases Schedule**

Description	Amount
NONDIVIDEND DISTRIBUTION	814

TY 2020 Taxes Schedule**Name:** THE WEST FOUNDATION INC**EIN:** 23-7416727**Taxes Schedule**

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PAYROLL TAXES	17,007	0		0
FEDERAL 990 PF	3,142	0		0
FOREIGN TAX	83	83		0