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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

2020

Open to Public Inspection

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

Name of foundation
THE MILLER FAMILY FOUNDATION

Number and street (or P.O. box number if mail is not delivered to street address)
32333 AURORA ROAD

City or town, state or province, country, and ZIP or foreign postal code
OLON, OH 44139

G Check all that apply:

☐ Initial return

☐ Initial return of a former public charity

☐ Final return

☐ Amended return

☐ Address change

☐ Name change

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) $\blacktriangleright$ \$ 5,944,306

J Accounting method:

☒ Cash

☐ Accrual

☐ Other (specify) _____
(Part I, column (d) must be on cash basis.)

A Employer identification number
34-1855841

B Telephone number (see instructions)
(440) 519-3500

C If exemption application is pending, check here ☐

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 ☐

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)

202,320

2

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

3

Interest on savings and temporary cash investments

2,649

2,649

4

Dividends and interest from securities

95,921

95,921

5a

Gross rents

b

Net rental income or (loss)

6a

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

-8,934

b

Gross sales price for all assets on line 6a

0

7

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

0

8

Net short-term capital gain

0

9

Income modifications

10a

Gross sales less returns and allowances

b

Less: Cost of goods sold

c

Gross profit or (loss) (attach schedule)

0

11

Other income (attach schedule)

-22,690

-22,690

12

Total. Add lines 1 through 11

269,266

75,880

0

Operating and Administrative Expenses

13

Compensation of officers, directors, trustees, etc.

14

Other employee salaries and wages

15

Pension plans, employee benefits

16a

Legal fees (attach schedule)

0

b

Accounting fees (attach schedule)

0

c

Other professional fees (attach schedule)

0

17

Interest

18

Taxes (attach schedule) (see instructions)

0

19

Depreciation (attach schedule) and depletion

0

20

Occupancy

21

Travel, conferences, and meetings

22

Printing and publications

23

Other expenses (attach schedule)

5,828

5,828

24

Total operating and administrative expenses. Add lines 13 through 23

5,828

5,828

0

25

Contributions, gifts, grants paid

583,881

583,881

26

Total expenses and disbursements. Add lines 24 and 25

589,709

5,828

583,881

27

Subtract line 26 from line 12:

a

Excess of revenue over expenses and disbursements

-320,443

b

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

70,052

c

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

0

For Paperwork Reduction Act Notice, see instructions.

Cat. No. 11289X

Form 990-PF (2020)

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	841,679	3,634,347	3,634,347
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶ <u>2,551</u>			
	Less: allowance for doubtful accounts ▶ _____	1,743	2,551	2,551
	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)		0	
	7 Other notes and loans receivable (attach schedule) ▶ _____			
	Less: allowance for doubtful accounts ▶ _____		0	
	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)			
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment: basis ▶ _____			
Less: accumulated depreciation (attach schedule) ▶ _____		0		
12 Investments—mortgage loans				
13 Investments—other (attach schedule)	4,901,172	1,798,187	2,307,233	
14 Land, buildings, and equipment: basis ▶ _____				
Less: accumulated depreciation (attach schedule) ▶ _____		0		
15 Other assets (describe ▶ _____)	1,592	175	175	
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	5,746,186	5,435,260	5,944,306	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons		0	
	21 Mortgages and other notes payable (attach schedule)		0	
	22 Other liabilities (describe ▶ _____)	0	0	
	23 Total liabilities (add lines 17 through 22)		0	
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			
	25 Net assets with donor restrictions			
	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	5,746,186	5,435,260	
	29 Total net assets or fund balances (see instructions)	5,746,186	5,435,260	
30 Total liabilities and net assets/fund balances (see instructions) .	5,746,186	5,435,260		

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	5,746,186
2 Enter amount from Part I, line 27a	2	-320,443
3 Other increases not included in line 2 (itemize) ▶ _____	3	9,517
4 Add lines 1, 2, and 3	4	5,435,260
5 Decreases not included in line 2 (itemize) ▶ _____	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29 .	6	5,435,260

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 FLOW THRU FROM PARTNERSHIP 88-0380362	P	2020-07-15	2020-12-31
b FLOW THRU FROM PARTNERSHIP 88-0380362	P	2018-01-01	2020-12-31
c FLOW THRU FROM PARTNERSHIP 27-3358127	P	2018-01-01	2020-12-31
d FLOW THRU FROM PARTNERSHIP 80-0756321	P	2018-01-01	2020-12-31
e BNY MELLON CAPITAL GAIN DISTRIBUTION	P	2018-01-01	2020-12-31

(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 0	0	4,780	-4,780
b 0	0	107,190	-107,190
c 18,910	0	0	18,910
d 77,522	0	0	77,522
e 6,604	0	0	6,604

(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 0	0	0	-4,780
b 0	0	0	-107,190
c 0	0	0	18,910
d 0	0	0	77,522
e 0	0	0	6,604

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	-8,934
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	-4,780

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 ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary—see instructions)		
b	Reserved.	1	974
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	974
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	974
6	Credits/Payments:		
a	2020 estimated tax payments and 2019 overpayment credited to 2020	6a	12,122
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	0
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d.	7	12,122
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.	8	
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	11,148
11	Enter the amount of line 10 to be: Credited to 2021 estimated tax 11,148 Refunded	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	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>	1b	No
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. ► \$ _____ (2) On foundation managers. ► \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ► \$ _____		
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
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? <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) ► OH _____		
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>LAUREN B SPILMAN STACIE L HALPERN</u> Telephone no. ► <u>(440) 519-3500</u>			

Located at ► 32333 AURORA RD SUITE 300 SOLON OH ZIP+4 ► 441392851

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		
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.

1a	During the year did the foundation (either directly or indirectly):		Yes	No
	(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			
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 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? ☐ 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 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)

		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
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).	☐ Yes ☐ No	
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? If "Yes" to 6b, file Form 8870.		6b No
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
LAUREN B SPILMAN 32333 AURORA RD 300 SOLON, OH 44139	TRUSTEE 1.00	0	0	0
STACIE L HALPERN 32333 AURORA RD 300 SOLON, OH 44139	TRUSTEE 1.00	0	0	0
DENNIS E LUBIN 32333 AURORA RD 300 SOLON, OH 44139	TRUSTEE 1.00	0	0	0
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
NONE				
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 N/A	0
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 N/A	0
2	
All other program-related investments. See instructions.	
3 	0
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	3,501,330
b	Average of monthly cash balances.	1b	2,174,050
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	5,675,380
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	
3	Subtract line 2 from line 1d.	3	5,675,380
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	85,131
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	5,590,249
6	Minimum investment return. Enter 5% of line 5.	6	279,512

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	279,512
2a	Tax on investment income for 2020 from Part VI, line 5.	2a	974
b	Income tax for 2020. (This does not include the tax from Part VI.).	2b	
c	Add lines 2a and 2b.	2c	974
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	278,538
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	278,538
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	278,538

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	583,881
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	583,881
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	583,881

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				278,538
2 Undistributed income, if any, as of the end of the 2020:				
a Enter amount for 2019 only.				
b Total for prior years: 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2020:				
a From 2015.	265,703			
b From 2016.	167,332			
c From 2017.	286,181			
d From 2018.	119,721			
e From 2019.	156,198			
f Total of lines 3a through e.	995,135			
4 Qualifying distributions for 2020 from Part XII, line 4: ► \$ 583,881				
a Applied to 2019, 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).	0			
d Applied to 2020 distributable amount.				278,538
e Remaining amount distributed out of corpus	305,343			
5 Excess distributions carryover applied to 2020. (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	1,300,478			
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.				
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).				
8 Excess distributions carryover from 2015 not applied on line 5 or line 7 (see instructions).	265,703			
9 Excess distributions carryover to 2021. Subtract lines 7 and 8 from line 6a.	1,034,775			
10 Analysis of line 9:				
a Excess from 2016.	167,332			
b Excess from 2017.	286,181			
c Excess from 2018.	119,721			
d Excess from 2019.	156,198			
e Excess from 2020.	305,343			

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

		Prior 3 years				(e) Total
		(a) 2020	(b) 2019	(c) 2018	(d) 2017	
2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b	85% of line 2a					
c	Qualifying distributions from Part XII, line 4 for each year listed					
d	Amounts included in line 2c not 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					

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)
NONE

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.
NONE

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

Check here ☒ if the foundation only makes contributions to 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 <i>Paid during the year</i> SEE STATEMENT ATTACHED VARIOUS VARIOUS, OH 44139		PUBLIC	CHARITABLE	583,881
Total ► 3a				583,881
b <i>Approved for future payment</i>				
Total ► 3b				

Enter gross amounts unless otherwise indicated.

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

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?			Yes	No
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.				

[illegible]

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.		
	*****	2021-05-04	*****
	_____ 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
	Richard D Armbruster CPA		2021-11-02		P00340818
	Firm's name ▶ SYMAX LTD				Firm's EIN ▶
	Firm's address ▶ 32333 AURORA ROAD SUITE 300 SOLON, OH 44139				Phone no. (440) 519-3500

efile GRAPHIC print - DO NOT PROCESS		As Filed Data -	DLN: 93491306008011
TY 2020 All Other Program Related Investments Schedule			
Name: THE MILLER FAMILY FOUNDATION			
EIN: 34-1855841			
All Other Program Related Investments Schedule			
Category			Amount
N/A			0

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

TY 2020 Gain/Loss from Sale of Other Assets Schedule

Name: THE MILLER FAMILY FOUNDATION

EIN: 34- 1855841

Gain Loss Sale Other Assets Schedule

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
AS REPORTED IN PART IV		Purchased		MARKET TRADING	0			8,934	-8,934	

TY 2020 Investments - Other Schedule**Name:** THE MILLER FAMILY FOUNDATION**EIN:** 34-1855841**Investments Other Schedule 2**

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
DODGE & COX BALANCED FUND		110,473	157,276
PIMCO SHORT TERM FUND		221,376	225,990
SYMAX EMERGING MARKETS FUND LP		0	0
SYMAX INTERNATIONAL FUND LP		839,200	1,165,330
SYMAX SMALL CAP FUND LP		163,572	0
SYMAX HIGH QUALITY EQUITY FUND LP		463,566	758,637

TY 2020 Other Assets Schedule**Name:** THE MILLER FAMILY FOUNDATION**EIN:** 34-1855841**Other Assets Schedule**

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
Accrued 1099 Income BNY Mellon Int	1,175	29	29
Accrued 1099 Income BNY Mellon Div	417	146	146

TY 2020 Other Expenses Schedule**Name:** THE MILLER FAMILY FOUNDATION**EIN:** 34-1855841**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Ohio Filing Fee 2020	200	200		
Portfolio Deductions	5,628	5,628		
Misc				

TY 2020 Other Income Schedule**Name:** THE MILLER FAMILY FOUNDATION**EIN:** 34-1855841**Other Income Schedule**

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
FLOW-THRU FROM SYMAX INT'L FUND LP	-22,709	-22,709	
FLOW-THRU FROM SYMAX SMALL CAP FD	19	19	
FLOW-THRU FROM SYMAX EMERGING MRKT FD			

TY 2020 Other Increases Schedule**Name:** THE MILLER FAMILY FOUNDATION**EIN:** 34-1855841**Other Increases Schedule**

Description	Amount
TAX EXEMPT INCOME	9,517
NONDIVIDEND DISTRIBUTION	0

TY 2020 Taxes Schedule

Name: THE MILLER FAMILY FOUNDATION
EIN: 34-1855841

Taxes Schedule

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
2018 FORM 990-PF EXTENSION PYMT				

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 <u>www.irs.gov/Form990</u> for the latest information.	OMB No. 1545-0047
		2020
Name of the organization THE MILLER FAMILY FOUNDATION		Employer identification number 34-1855841

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 33¹/₃% 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
THE MILLER FAMILY FOUNDATION

Employer identification number
34-1855841

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	STACIE L HALPERN 2003 CLAT 32333 AURORA RD 300 SOLON, OH 44139	\$ 101,160	☒ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
2	LAUREN B SPILMAN 2003 CLAT 32333 AURORA RD 300 SOLON, OH 44139	\$ 101,160	☒ 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.)
.		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)

Name of organization THE MILLER FAMILY FOUNDATION	Employer identification number 34-1855841
--	--

Part II Noncash Property			
(a) No. from Part I	(b) Description of noncash property given (see instructions). Use duplicate copies of Part II if additional space is needed.	(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
-		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-		\$	

34-1855841

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.

Schedule B (Form 990, 990-EZ, or 990-PF) (2020)

Address Database

Recipient	Relationship	Foundation Status	Purpose	
Grants				
None				
Charitable Contributions				
Association of Israel's Decorative Arts (AIDA) 110 East 59th Street, 26th Floor New York, NY 10022	None	PC	In general support of its mission to connect decorative artists from Israel with North American and European galleries, collectors, institutions and education facilities to enable them to reach the major world markets and achieve their creative potential.	500.00
American Friends of Magen David Adom 20 W 36th Suite 1100 New York, NY 10018	None	PC	In general support of its mission to train volunteer and professional medical responders mandated by the Israeli government	54.00
Beauty Changes Lives P.O. Box 7174 Rancho Santa Fe, CA 92067	None	PC	In general support of its mission to provide scholarship assistance for those seeking career training in the beauty and wellness industry and support charitable causes.	100,000.00
B'nai Jeshurun Congregation 27501 Fairmount Blvd. Pepper Pike, OH 44124	None	PC	General Support	10,000.00
Boys & Girls Clubs of Cleveland 6114 Broadway Avenue Cleveland, OH 44127	None	PC	In general support of its mission to inspire and enable all young people, especially those from disadvantaged circumstances, to realize their full potential as productive, responsible citizens.	15,000.00
Center for Arts-Inspired Learning (formerly Young Audiences of Northeast Ohio) 13110 Shaker Square, Suite C203 Cleveland, OH 44120	None	PC	In general support of its mission to enrich the lives of children and promoting creative learning by uniting arts and education.	600.00
Children's Museum of Manhattan The Tisch Building 212 W 83rd St New York, NY 10024	None	PC	In general support of its mission to inspire children and families to learn about themselves and our culturally diverse world through a unique environment of interactive exhibitions and programs.	360.00
The Cleveland Clinic Foundation 9500 Euclid Avenue Cleveland, Ohio 44195	None	PC	General Support for the Cleveland Clinic Children's Hospital at The Cleveland Clinic.	10,586.00
The Cleveland Foundation 1422 Euclid Avenue, Ste 1300 Cleveland, OH 44115	None	PC	In general support of its mission to enhance the lives of all residents of Greater Cleveland, now and for generations to come	2,500.00
Cystic Fibrosis Foundation 6931 Arlington Road, Suite 200 Bethesda, MD 20814	None	PC	In general support of its mission to cure cystic fibrosis and to provide all people with the disease the opportunity to lead full, productive lives by funding research and drug development, promoting treatment and ensuring access to high-quality, specialized care	1,000.00
Cuyahoga County Public Library Foundation 2111 Snow Road Parma, OH 44134	None	PC	In general support of its mission to enhance the quality of life in the community by fostering a reading public, supporting individuals at all stages of life with opportunities to learn and develop skills through programs, classes and resources, and provide free access to technology	
Cuyahoga Valley Art Center 2131 Front St Cuyahoga Falls, OH 44221	None	PC	In general support of its mission to advocate for a greater understanding of the visual arts through the promotion of art education and community engagement	150.00
Garrett Space 1400 Granger Ave Ann Arbor, MI 48104	None	PC	In general support of its mission to treat young adults experiencing mental health challenges and for any other purposes to promote mental health wellness	180.00
Greater Cleveland Foodbank 15500 South Waterloo Road Cleveland, OH 44110	None	PC	In general support of its mission to alleviate hunger by providing food and support to community organizations that feed the hungry.	7,534.00
The Gathering Place 23300 Commerce Park Beachwood, OH 44122	None	PC	In general support of its mission to support, educate and empower individuals and families touched by cancer through programs and services free of charge.	20,324.00

Hawken School P O Box 8002 Gates Mills, OH 44040	None	PC	In general support of its mission to provide quality education to elementary and secondary school students.	1,854.00
InMotion 4829 Galaxy Pkwy Ste M Warrensville Hts, OH 44128	None	PC	In general support of its mission to help people manage their movement disorders, take charge of their well-being and embrace the opportunities and challenges ahead.	500.00
Jewish Federation of Cleveland 1750 Euclid Avenue Cleveland, OH 44115	None	PC	In general support of its mission to produce the human and financial resources, ideas and commitment necessary to preserve and fortify life for members of the Cleveland Jewish Community, build and strengthen community life throughout greater Cleveland, provide for the rescue and relief of tens of thousands of people in Israel and elsewhere around the world, and support the work of other charitable, educational and religious organizations.	100,108.00
Jewish Federation of Cleveland 1750 Euclid Avenue Cleveland, OH 44115	None	PC	To support the Hebrew Shelter Home (beneficiary agency of the Jewish Community Federation of Cleveland).	252.00
Jewish National Fund 42 East 69th Street New York, NY 10021-5093	None	PC	In general support of its mission to produce the human and financial resources, ideas and commitment necessary to preserve and fortify Jewish life in Cleveland, to contribute to the creative survival in the US, in Israel, and throughout the world, and to fulfill their role as American citizens to strengthen and advance the American democratic ideal.	126.00
Lawrence School 1551 E Wallings Rd Broadview Heights, OH 44147	None	PC	In general support of its mission to teach students who have distinct learning styles, ignite their potential, and inspire academic and social success.	15,180.00
Lynn University, Inc. 3601 N Military Trail Boca Raton, FL 33437	None	PC	In general support of its mission to provide education, support, and environment to enable individual students to realize their potential and prepare for success.	250,000.00
Metropolitan Museum of Art 1000 Fifth Ave New York, NY 10028	None	PC	In general support of its mission to establish and maintain a museum and library of the fine arts, and the application of arts	210.00
Menorah Park Foundation 27100 Cedar Road Beachwood, OH 44122	None	PC	In general support of its mission to provide financial resources to enable Menorah Park to care for the physical, emotional, intellectual and spiritual needs of its residents and clients	108.00
Museum of Contemporary Art Cleveland 11400 Euclid Ave Cleveland, OH 44106	None	PC	In general support of its mission to challenge, inspire, and teach a wide range of audiences. Also to push the boundaries of innovation, creativity, and exploration through exhibits, education, and programs.	10,250.00
National Council of Jewish Women Incorporated 26055 Emery Rd Ste L Cleveland, OH 44128	None	PC	In general support of its mission to research, educate, advocate, and provide community service to improve the quality of life for women, children, and families and strive to ensure individual rights and freedoms for all.	250.00
Park Synagogue 3300 Mayfield Road Cleveland Heights, OH 44118-1899	None	PC	General Support	19,713.00
Playhouse Square Foundation 1501 Euclid Avenue Cleveland, OH 44115	None	PC	In general support of its mission to operate and sustain a financially viable performing arts and entertainment center that presents and produces works of excellence for the benefit of all citizens.	10,000.00
Preston's H.O.P.E. c/o Preston Fund for SMA Research 32333 Aurora Rd., Suite 300 Solon, OH 44139	None	PC	General maintenance support for the Preston's HOPE playground fo disabled children.	100.00
Rock and Roll Hall of Fame and Museum, Inc. 1100 Rock and Roll Blvd Cleveland, OH 44114 USA	None	PC	In general support of its mission to engage, teach, and inspire through the power of rock and roll	500.00
Telshe Yeshiva 28400 Euclid Avenue Wickliffe, OH 44092	None	PC	General Support	18.00
Telluride Volunteer Fire Department P.O. Box 1602 Telluride, CO 81435	None	PC	General Support	424.00
University Hospitals 3605 Warrensville Center Rd Beachwood, OH 44122	None	PC	General Support	5,000.00

Total Charitable Contributions

583,381.00