

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](http://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 ESTHER M & FREEMAN E EVERETT CHARITABLE		A Employer identification number 52-7246146	
Number and street (or P.O. box number if mail is not delivered to street address) 10 S DEARBORN IL1-0111		Room/suite	
City or town, state or province, country, and ZIP or foreign postal code CHICAGO, IL 60603		B Telephone number (see instructions) (800) 496-2583	
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		C If exemption application is pending, check here <input type="checkbox"/> D 1. Foreign organizations, check here..... <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation ... <input type="checkbox"/> E If private foundation status was terminated under section 507(b)(1)(A), check here ..... <input type="checkbox"/> F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ..... <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			
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ <u>3,077,950</u>		J Accounting method: <input type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)	

<b>Part I Analysis of Revenue and Expenses</b> <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)</i>		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
<b>Revenue</b>	<b>1</b> Contributions, gifts, grants, etc., received (attach schedule)				
	<b>2</b> Check <input checked="" type="checkbox"/> if the foundation is <b>not</b> required to attach Sch. B				
	<b>3</b> Interest on savings and temporary cash investments				
	<b>4</b> Dividends and interest from securities	61,154	60,734		
	<b>5a</b> Gross rents				
	<b>b</b> Net rental income or (loss)				
	<b>6a</b> Net gain or (loss) from sale of assets not on line 10	64,738			
	<b>b</b> Gross sales price for all assets on line 6a <u>1,175,794</u>				
	<b>7</b> Capital gain net income (from Part IV, line 2)		64,738		
	<b>8</b> Net short-term capital gain			0	
	<b>9</b> Income modifications				
	<b>10a</b> Gross sales less returns and allowances				
<b>b</b> Less: Cost of goods sold					
<b>c</b> Gross profit or (loss) (attach schedule)					
<b>11</b> Other income (attach schedule)					
<b>12 Total.</b> Add lines 1 through 11	125,892	125,472			
<b>Operating and Administrative Expenses</b>	<b>13</b> Compensation of officers, directors, trustees, etc.	42,161	21,081		21,080
	<b>14</b> Other employee salaries and wages		0	0	0
	<b>15</b> Pension plans, employee benefits		0	0	0
	<b>16a</b> Legal fees (attach schedule)				0
	<b>b</b> Accounting fees (attach schedule)				0
	<b>c</b> Other professional fees (attach schedule)				0
	<b>17</b> Interest				0
	<b>18</b> Taxes (attach schedule) (see instructions)	1,295	1,085		0
	<b>19</b> Depreciation (attach schedule) and depletion	0	0		
	<b>20</b> Occupancy				
	<b>21</b> Travel, conferences, and meetings		0	0	
	<b>22</b> Printing and publications		0	0	
	<b>23</b> Other expenses (attach schedule)				
	<b>24 Total operating and administrative expenses.</b> Add lines 13 through 23	43,456	22,166	0	21,080
	<b>25</b> Contributions, gifts, grants paid	151,978			151,978
<b>26 Total expenses and disbursements.</b> Add lines 24 and 25	195,434	22,166	0	173,058	
<b>27</b> Subtract line 26 from line 12:					
<b>a Excess of revenue over expenses and disbursements</b>	-69,542				
<b>b Net investment income</b> (if negative, enter -0-)		103,306			
<b>c Adjusted net income</b> (if negative, enter -0-)			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
<b>Assets</b>	<b>1</b> Cash—non-interest-bearing . . . . .	16,479	19,629	19,629
	<b>2</b> Savings and temporary cash investments . . . . .	27,562	83,345	83,345
	<b>3</b> Accounts receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____		0	0
	<b>4</b> Pledges receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	<b>5</b> Grants receivable . . . . .			
	<b>6</b> Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .			
	<b>7</b> Other notes and loans receivable (attach schedule) ▶ _____ Less: allowance for doubtful accounts ▶ _____ 0			
	<b>8</b> Inventories for sale or use . . . . .			
	<b>9</b> Prepaid expenses and deferred charges . . . . .			
	<b>10a</b> Investments—U.S. and state government obligations (attach schedule)			
	<b>b</b> Investments—corporate stock (attach schedule) . . . . .	1,403,441	1,244,292	1,716,654
	<b>c</b> Investments—corporate bonds (attach schedule) . . . . .	1,036,697	1,062,765	1,109,862
	<b>11</b> Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
	<b>12</b> Investments—mortgage loans . . . . .			
	<b>13</b> Investments—other (attach schedule) . . . . .	143,318	147,491	148,460
	<b>14</b> Land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
<b>15</b> Other assets (describe ▶ _____)				
<b>16 Total assets</b> (to be completed by all filers—see the instructions. Also, see page 1, item I)	2,627,497	2,557,522	3,077,950	
<b>Liabilities</b>	<b>17</b> Accounts payable and accrued expenses . . . . .			
	<b>18</b> Grants payable . . . . .			
	<b>19</b> Deferred revenue . . . . .			
	<b>20</b> Loans from officers, directors, trustees, and other disqualified persons			
	<b>21</b> Mortgages and other notes payable (attach schedule) . . . . .			
	<b>22</b> Other liabilities (describe ▶ _____)			
	<b>23 Total liabilities</b> (add lines 17 through 22) . . . . .		0	
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow FASB ASC 958, check here</b> ▶ <input type="checkbox"/> <b>and complete lines 24, 25, 29 and 30.</b>			
	<b>24</b> Net assets without donor restrictions . . . . .			
	<b>25</b> Net assets with donor restrictions . . . . .			
	<b>Foundations that do not follow FASB ASC 958, check here</b> ▶ <input checked="" type="checkbox"/> <b>and complete lines 26 through 30.</b>			
	<b>26</b> Capital stock, trust principal, or current funds . . . . .	2,627,497	2,557,522	
	<b>27</b> Paid-in or capital surplus, or land, bldg., and equipment fund			
	<b>28</b> Retained earnings, accumulated income, endowment, or other funds			
<b>29 Total net assets or fund balances</b> (see instructions) . . . . .	2,627,497	2,557,522		
<b>30 Total liabilities and net assets/fund balances</b> (see instructions) .	2,627,497	2,557,522		

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

<b>1</b> 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) . . . . .	<b>1</b>	2,627,497
<b>2</b> Enter amount from Part I, line 27a . . . . .	<b>2</b>	-69,542
<b>3</b> Other increases not included in line 2 (itemize) ▶ _____	<b>3</b>	2,967
<b>4</b> Add lines 1, 2, and 3 . . . . .	<b>4</b>	2,560,922
<b>5</b> Decreases not included in line 2 (itemize) ▶ _____	<b>5</b>	3,400
<b>6</b> Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29 .	<b>6</b>	2,557,522

**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.)
<b>1a</b> See Additional Data Table			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
<b>a</b> See Additional Data Table			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

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	
<b>a</b> See Additional Data Table			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

<b>2</b> Capital gain net income or (net capital loss)	{	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	}	<b>2</b>	64,738
<b>3</b> Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8	{		}	<b>3</b>	

**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**

(a) Reserved	(b) Reserved	(c) Reserved	(d) Reserved
<b>2</b> Reserved . . . . .			<b>2</b>
<b>3</b> Reserved . . . . .			<b>3</b>
<b>4</b> Reserved . . . . .			<b>4</b>
<b>5</b> Reserved . . . . .			<b>5</b>
<b>6</b> Reserved . . . . .			<b>6</b>
<b>7</b> Reserved . . . . .			<b>7</b>
<b>8</b> Reserved . . . . .			<b>8</b>

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

Table with 11 rows for excise tax calculations. Includes fields for exempt foundations, tax under section 511, tax based on investment income, and credits/payments. Total tax due is 260, with 260 overpaid.

Part VII-A Statements Regarding Activities

Table with 10 rows for activity statements. Columns include question number, Yes, and No. Questions cover political activities, tax on political expenditures, and asset requirements.

Part VII-A Statements Regarding Activities (continued)

Table with 3 columns: Question number, Question text, and Yes/No columns. Rows 11, 12, 13.

14 The books are in care of JP MORGAN CHASE BANK NA Telephone no. (800) 496-2583

Located at 10 S DEARBORN ST MC IL 1-0111 CHICAGO IL ZIP+4 60603

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

Table with 3 columns: Question number, Question text, and Yes/No columns. Row 16.

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.

Main table for Part VII-B with 3 columns: Question number, Question text, and Yes/No columns. Rows 1a through 4b.



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

<b>3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".</b>		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
<b>Total number of others receiving over \$50,000 for professional services.</b> . . . . . ▶		<b>0</b>

**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
<b>1</b>	
<b>2</b>	
<b>3</b>	
<b>4</b>	

**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
<b>1</b>	
<b>2</b>	
All other program-related investments. See instructions.	
<b>3</b>	
<b>Total.</b> Add lines 1 through 3 . . . . . ▶	

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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b>	Average monthly fair market value of securities. . . . .	<b>1a</b>	2,779,253
<b>b</b>	Average of monthly cash balances. . . . .	<b>1b</b>	41,352
<b>c</b>	Fair market value of all other assets (see instructions). . . . .	<b>1c</b>	0
<b>d</b>	<b>Total</b> (add lines 1a, b, and c). . . . .	<b>1d</b>	2,820,605
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation). . . . .	<b>1e</b>	0
<b>2</b>	Acquisition indebtedness applicable to line 1 assets. . . . .	<b>2</b>	0
<b>3</b>	Subtract line 2 from line 1d. . . . .	<b>3</b>	2,820,605
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions). . . . .	<b>4</b>	42,309
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	2,778,296
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5. . . . .	<b>6</b>	138,915

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

<b>1</b>	Minimum investment return from Part X, line 6. . . . .	<b>1</b>	138,915
<b>2a</b>	Tax on investment income for 2020 from Part VI, line 5. . . . .	<b>2a</b>	1,436
<b>b</b>	Income tax for 2020. (This does not include the tax from Part VI.). . . . .	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b. . . . .	<b>2c</b>	1,436
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1. . . . .	<b>3</b>	137,479
<b>4</b>	Recoveries of amounts treated as qualifying distributions. . . . .	<b>4</b>	0
<b>5</b>	Add lines 3 and 4. . . . .	<b>5</b>	137,479
<b>6</b>	Deduction from distributable amount (see instructions). . . . .	<b>6</b>	0
<b>7</b>	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1. . . . .	<b>7</b>	137,479

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

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b>	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26. . . . .	<b>1a</b>	173,058
<b>b</b>	Program-related investments—total from Part IX-B. . . . .	<b>1b</b>	0
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes. . . . .	<b>2</b>	0
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b>	Suitability test (prior IRS approval required). . . . .	<b>3a</b>	0
<b>b</b>	Cash distribution test (attach the required schedule). . . . .	<b>3b</b>	0
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	173,058
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions. . . . .	<b>5</b>	0
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4. . . . .	<b>6</b>	173,058

**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
<b>1</b> Distributable amount for 2020 from Part XI, line 7				137,479
<b>2</b> Undistributed income, if any, as of the end of 2020:				
<b>a</b> Enter amount for 2019 only. . . . .			0	
<b>b</b> Total for prior years: 20___, 20___, 20___		0		
<b>3</b> Excess distributions carryover, if any, to 2020:				
<b>a</b> From 2015. . . . .	16,484			
<b>b</b> From 2016. . . . .	49,282			
<b>c</b> From 2017. . . . .	0			
<b>d</b> From 2018. . . . .	0			
<b>e</b> From 2019. . . . .	57,228			
<b>f</b> Total of lines 3a through e. . . . .	122,994			
<b>4</b> Qualifying distributions for 2020 from Part XII, line 4: ▶ \$ <u>173,058</u>				
<b>a</b> Applied to 2019, but not more than line 2a			0	
<b>b</b> Applied to undistributed income of prior years (Election required—see instructions). . . . .		0		
<b>c</b> Treated as distributions out of corpus (Election required—see instructions). . . . .	0			
<b>d</b> Applied to 2020 distributable amount. . . . .				137,479
<b>e</b> Remaining amount distributed out of corpus	35,579			
<b>5</b> Excess distributions carryover applied to 2020. (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	158,573			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b. . . . .		0		
<b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed. . . . .		0		
<b>d</b> Subtract line 6c from line 6b. Taxable amount—see instructions. . . . .		0		
<b>e</b> Undistributed income for 2019. Subtract line 4a from line 2a. Taxable amount—see instructions. . . . .			0	
<b>f</b> Undistributed income for 2021. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020. . . . .				0
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions). . . . .	0			
<b>8</b> Excess distributions carryover from 2015 not applied on line 5 or line 7 (see instructions). . . . .	16,484			
<b>9</b> Excess distributions carryover to 2021. Subtract lines 7 and 8 from line 6a. . . . .	142,089			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2016. . . . .	49,282			
<b>b</b> Excess from 2017. . . . .	0			
<b>c</b> Excess from 2018. . . . .	0			
<b>d</b> Excess from 2019. . . . .	57,228			
<b>e</b> Excess from 2020. . . . .	35,579			

**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)

	Tax year	Prior 3 years			<b>(e) Total</b>
	<b>(a) 2020</b>	<b>(b) 2019</b>	<b>(c) 2018</b>	<b>(d) 2017</b>	
<b>2a</b> Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed . . . . .					
<b>b</b> 85% of line 2a . . . . .					
<b>c</b> Qualifying distributions from Part XII, line 4 for each year listed . . . . .					
<b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities . . . . .					
<b>e</b> Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c . . . . .					
<b>3</b> Complete 3a, b, or c for the alternative test relied upon:					
<b>a</b> "Assets" alternative test—enter:					
<b>(1)</b> Value of all assets . . . . .					
<b>(2)</b> Value of assets qualifying under section 4942(j)(3)(B)(i)					
<b>b</b> "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . . . .					
<b>c</b> "Support" alternative test—enter:					
<b>(1)</b> Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) . . . . .					
<b>(2)</b> Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . . .					
<b>(3)</b> Largest amount of support from an exempt organization					
<b>(4)</b> 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:  
 PIKES PEAK COMMUNITY FOUNDATION  
 730 N NEVADA AVE  
 COLORADO SPRINGS, CO 80903  
 (719) 389-1251

**b** The form in which applications should be submitted and information and materials they should include:  
 WRITTEN REQUEST AND PROOF OF TAX EXEMPT STATUS UNDER IRC 501(C)(3)

**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:  
 MUST BE IN FURTHERANCE OF TAX EXEMPT PURPOSE

**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)				
<b>a</b> <i>Paid during the year</i> See Additional Data Table				
<b>Total . . . . .</b> ▶ <b>3a</b>				151,978
<b>b</b> <i>Approved for future payment</i>				
<b>Total . . . . .</b> ▶ <b>3b</b>				





**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.)
. AMERICAN INTL GROUP INC			2020-01-02
1251.041 CRM LNG/SHRT OPPORT-INST			2020-01-09
1471.431 CRM LNG/SHRT OPPORT-INST		2018-01-19	2020-01-16
520.871 AMER FNDS INTL VNTG-F3			2020-01-31
704. JPMORGAN BETABUILDERS JAPAN ETF		2018-08-16	2020-02-13
322. JPMORGAN BETABUILDERS JAPAN ETF		2018-08-16	2020-02-13
388.161 AMER FNDS INTL VNTG-F3		2013-11-04	2020-02-21
167.621 FIDELITY 500 INDEX-INST PRM		2018-02-07	2020-02-21
801.738 SIX CIRCLES US UNCONSTR EQ		2018-10-15	2020-02-21
340.756 FIDELITY 500 INDEX-INST PRM			2020-02-24

**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)
27			27
12,623		12,563	60
14,773		15,671	-898
7,412		5,854	1,558
17,128		16,635	493
7,846		7,609	237
5,632		4,518	1,114
19,451		15,733	3,718
9,284		7,985	1,299
38,223		32,710	5,513

**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	
			27
			60
			-898
			1,558
			493
			237
			1,114
			3,718
			1,299
			5,513

**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, <b>(a)</b> 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	<b>(b)</b> How acquired P—Purchase D—Donation	<b>(c)</b> Date acquired (mo., day, yr.)	<b>(d)</b> Date sold (mo., day, yr.)
177.024 FIDELITY INTL INDX-INST PRM		2020-01-31	2020-03-10
162. ISHARES MISC EAFE INDEX FUND		2017-05-08	2020-03-10
1385. ISHARES CORE MSCI EAFE ETF			2020-03-10
545. SCHWAB U.S. TIPS ETF		2018-10-01	2020-03-10
1056.713 FIDELITY 500 INDEX-INST PRM			2020-03-16
107. ISHARES TR 20+ TREAS INDEX FD		2019-09-23	2020-03-27
240. ISHARES US TREASURY BOND ETF		2020-03-10	2020-03-27
1426.825 VANGUARD TTL INTL BND-ADM		2017-04-19	2020-04-16
. BIOVAIL CORP			2020-04-17
3125.453 SIX CIRCLES ULTR SHRT DUR		2018-10-15	2020-04-24

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

<b>(e)</b> Gross sales price	<b>(f)</b> Depreciation allowed (or allowable)	<b>(g)</b> Cost or other basis plus expense of sale	<b>(h)</b> Gain or (loss) (e) plus (f) minus (g)
6,456		7,412	-956
9,559		10,545	-986
76,539		85,104	-8,565
30,942		29,302	1,640
87,834		103,781	-15,947
17,943		15,214	2,729
6,741		6,664	77
32,446		31,048	1,398
15			15
31,067		31,286	-219

**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			<b>(l)</b> Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
<b>(i)</b> F.M.V. as of 12/31/69	<b>(j)</b> Adjusted basis as of 12/31/69	<b>(k)</b> Excess of col. (i) over col. (j), if any	
			-956
			-986
			-8,565
			1,640
			-15,947
			2,729
			77
			1,398
			15
			-219

**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.)
185. ISHARES TR 7-10 YR TREAS INDEX FD		2019-02-20	2020-05-07
513.676 AMER FNDS INTL VNTG-F3		2013-11-04	2020-05-15
2280.887 BLACKSTONE ALT MULTI-STRAT-Y		2018-11-14	2020-06-01
2646.91 DOUBLELINE TTL RTRN BND-I			2020-06-10
633.52 FIDELITY 500 INDEX-INST PRM		2018-10-15	2020-06-10
385.989 FIDELITY 500 INDEX-INST PRM		2018-10-15	2020-08-17
66. ISHARES TR 7-10 YR TREAS INDEX FD		2019-09-23	2020-08-17
317. ISHARES TR 7-10 YR TREAS INDEX FD		2019-02-20	2020-08-17
12. ISHARES US TREASURY BOND ETF		2020-03-10	2020-08-17
5484.042 JPMORGAN CORE BOND FUND ULTRA			2020-08-17

**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)
22,556		19,354	3,202
6,498		5,979	519
21,600		24,291	-2,691
28,269		28,360	-91
70,308		60,938	9,370
45,346		37,128	8,218
8,027		7,404	623
38,554		33,163	5,391
335		333	2
68,386		63,538	4,848

**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	
			3,202
			519
			-2,691
			-91
			9,370
			8,218
			623
			5,391
			2
			4,848

**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, <b>(a)</b> 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	<b>(b)</b> How acquired P—Purchase D—Donation	<b>(c)</b> Date acquired (mo., day, yr.)	<b>(d)</b> Date sold (mo., day, yr.)
480.756 AMER FNDS INTL VNTG-F3			2020-09-25
2658.825 DOUBLELINE TTL RTRN BND-R6			2020-10-21
237. ISHARES TR 7-10 YR TREAS INDEX FD		2019-09-23	2020-10-21
450. JPMORGAN BETABUILDERS EUROPE ETF		2018-08-16	2020-10-21
596. JPMORGAN BETABUILDERS EUROPE ETF		2018-08-16	2020-10-21
239. ISHARES TR 7-10 YR TREAS INDEX FD		2019-09-23	2020-11-02
9365.186 JPMORGAN CORE BOND FUND ULTRA			2020-11-02
4165.281 VANGUARD TTL INTL BND-ADM		2017-04-19	2020-11-02
7472.105 BLCKRCK HI YLD BND PORT-K		2020-03-31	2020-11-05
1319. JPMORGAN BETABUILDERS EUROPE ETF		2018-08-16	2020-12-16

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

<b>(e)</b> Gross sales price	<b>(f)</b> Depreciation allowed (or allowable)	<b>(g)</b> Cost or other basis plus expense of sale	<b>(h)</b> Gain or (loss) (e) plus (f) minus (g)
7,120		5,526	1,594
28,476		28,360	116
28,588		26,587	2,001
10,440		10,760	-320
13,846		14,250	-404
28,718		26,811	1,907
115,941		106,851	9,090
97,176		90,637	6,539
56,788		49,615	7,173
34,648		31,537	3,111

**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			<b>(l)</b> Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
<b>(i)</b> F.M.V. as of 12/31/69	<b>(j)</b> Adjusted basis as of 12/31/69	<b>(k)</b> Excess of col. (i) over col. (j), if any	
			1,594
			116
			2,001
			-320
			-404
			1,907
			9,090
			6,539
			7,173
			3,111









**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)				
<b>a</b> <i>Paid during the year</i>				
UNITED STATES OLYMPIC MUSEUM PO BOX 681 COLORADO SPRINGS, CO 80901	NONE	PC	GENERAL	20,000
SPRINGS RESCUE MISSION 5 W LAS VEGAS ST Colorado Springs, CO 80903	NONE	PC	GENERAL	500
CASA OF THE PIKES PEAK REGION 701 S CASCADE AVE COLORADO SPRINGS, CO 80903	NONE	PC	GENERAL	6,300
<b>Total . . . . .</b> ▶ <b>3a</b>				151,978

**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)				
<b>a</b> <i>Paid during the year</i>				
INDYGIVE235 S NEVADA AVE COLORADO SPRINGS, CO 80903	NONE	PC	GENERAL	5,000
PIKES PEAK COMMUNITY FOUNDATION 730 N NEVADA AVE COLORADO SPRINGS, CO 80903	NONE	PC	GENERAL	84,928
TRUST FOR PUBLIC LAND 101 MONTGOMERY ST San Francisco, CA 94104	NONE	PC	GENERAL	25,000
<b>Total . . . . . ▶ 3a</b>				151,978

**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)				
<b>a</b> <i>Paid during the year</i>				
ALZHEIMERS ASSOCIATION COLORADO CHAPTER 2315 BOTT AVENUE COLORADO SPRINGS, CO 80904	NONE	PC	GENERAL	250
CITY OF COLORADO SPRINGS C/O PARKS REC & CULTURAL SVS 1401 RECREATION WAY COLORADO SPRINGS, CO 80905	NONE	PC	GENERAL	10,000
<b>Total . . . . . ▶ 3a</b>				151,978

## TY 2020 Investments Corporate Bonds Schedule

**Name:** ESTHER M & FREEMAN E EVERETT CHARITABLE

**EIN:** 52-7246146

### Investments Corporate Bonds Schedule

Name of Bond	End of Year Book Value	End of Year Fair Market Value
258620103 DOUBLELINE TTL RTRN		
4812C0100 JPM CORE BOND FD - U	53,834	55,522
92203J308 VANGUARD TTL INTL BN	265,567	281,736
722005816 PIMCO INV GRD CRD BN	51,873	58,094
808524870 SCHWAB U.S. TIPS ETF		
54401E143 LORD ABBETT SHRT DUR	56,555	57,509
09260B614 BLCKRCK HI YLD BND P	25,812	30,322
83002G108 SIX CIRCLES ULTR SHR	26,214	26,267
464287432 ISHARES 20+ YEAR TRE	80,467	85,016
464287440 ISHARES 7-10 YEAR TR		
72201F490 PIMCO INCOME FUND-IN	28,811	28,883
54401E218 LORD ABBETT HIGH YIE	78,076	89,763
83002G702 SIX CIRCLES GLOBAL B	281,357	281,767
83002G884 SIX CIRCLES CREDIT O	57,951	58,750
92206C771 VANGUARD MORTGAGE-BA	56,248	56,233

## TY 2020 Investments Corporate Stock Schedule

**Name:** ESTHER M & FREEMAN E EVERETT CHARITABLE

**EIN:** 52-7246146

### Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
464287465 ISHARES MSCI EAFE ET	22,978	25,755
78462F103 SPDR S&P 500 ETF TRU	293,578	548,482
46432F842 ISHARES CORE MSCI EA		
315911750 FIDELITY 500 INDEX-I	285,323	381,865
46641Q688 JPM BTABLDRS DEV ASI	29,719	32,066
46641Q696 JPMORGAN BETABUILDER	59,217	66,592
46641Q712 JPMORGAN BETABUILDER	83,164	98,420
46641Q720 JPMORGAN BETABUILDER	28,289	30,665
83002G306 SIX CIRCLES US UNCON	205,012	274,434
83002G405 SIX CIRCLES INTL UNC	172,869	183,464
14019V606 AMER FNDS INTL VNTG-	5,367	8,962
46434G103 ISHARES CORE MSCI EM	58,776	65,949

**TY 2020 Investments - Other Schedule****Name:** ESTHER M & FREEMAN E EVERETT CHARITABLE**EIN:** 52-7246146**Investments Other Schedule 2**

<b>Category/ Item</b>	<b>Listed at Cost or FMV</b>	<b>Book Value</b>	<b>End of Year Fair Market Value</b>
12628J881 CRM LNG/SHRT OPPORT-			
09257V508 BLACKSTONE ALT MULTI	AT COST	61,497	58,458
09250J734 BLACKROCK EVNT DRVN	AT COST	29,297	29,385
64128R608 NEUBERGER BERMAN LON	AT COST	29,627	32,839
72201U638 PIMCO MRTG OPP & BND	AT COST	27,070	27,778

**TY 2020 Other Decreases Schedule****Name:** ESTHER M & FREEMAN E EVERETT CHARITABLE**EIN:** 52-7246146

<b>Description</b>	<b>Amount</b>
2020 TRANSACTIONS POSTED IN 2021	3,315
RETURN OF CAPITAL ADJUSTMENT	82
ROUNDING	3

**TY 2020 Other Increases Schedule****Name:** ESTHER M & FREEMAN E EVERETT CHARITABLE**EIN:** 52-7246146**Other Increases Schedule**

Description	Amount
2019 TRANSACTIONS POSTED IN 2020	2,967

**TY 2020 Taxes Schedule****Name:** ESTHER M & FREEMAN E EVERETT CHARITABLE**EIN:** 52-7246146**Taxes Schedule**

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
FEDERAL ESTIMATES - INCOME	210	0		0
FOREIGN TAXES ON QUALIFIED FOR	958	958		0
FOREIGN TAXES ON NONQUALIFIED	127	127		0