

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

Name of foundation THE H FOUNDATION C/O CARR RIGGS & INGRAM LLC		A Employer identification number 59-2947260	
Number and street (or P.O. box number if mail is not delivered to street address) 600 CLEVELAND STREET NO 1000		Room/suite	
City or town, state or province, country, and ZIP or foreign postal code CLEARWATER, FL 33755		B Telephone number (see instructions) (727) 446-0504	
G Check all that apply: ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		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 ☐	
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶\$ 5,079,648			

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 ☒ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	105,997	105,997		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	99,606			
	b Gross sales price for all assets on line 6a 527,422				
	7 Capital gain net income (from Part IV, line 2)		99,606		
	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	205,603	205,603		
	13 Compensation of officers, directors, trustees, etc.	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	2,700	0		0
	c Other professional fees (attach schedule)	26,950	26,950		0
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	6,807	3,237		0
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings	617	0		0
	22 Printing and publications				
	23 Other expenses (attach schedule)				
	24 Total operating and administrative expenses. Add lines 13 through 23	37,074	30,187		0
	25 Contributions, gifts, grants paid	262,600			262,600
	26 Total expenses and disbursements. Add lines 24 and 25	299,674	30,187		262,600
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	-94,071			
	b Net investment income (if negative, enter -0-)		175,416		
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	934		
	2 Savings and temporary cash investments	240,393	218,465	218,465
	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)			
	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)	2,436,678	2,353,355	4,080,290
	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)	342,111	354,225	780,893
	14 Land, buildings, and equipment: basis ▶ <u>1,535</u> Less: accumulated depreciation (attach schedule) ▶ <u>1,535</u>			
15 Other assets (describe ▶ _____)				
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	3,020,116	2,926,045	5,079,648	
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 ▶ ☐ 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	0	0	
	27 Paid-in or capital surplus, or land, bldg., and equipment fund	0	0	
	28 Retained earnings, accumulated income, endowment, or other funds	3,020,116	2,926,045	
	29 Total net assets or fund balances (see instructions)	3,020,116	2,926,045	
30 Total liabilities and net assets/fund balances (see instructions) .	3,020,116	2,926,045		

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	3,020,116
2 Enter amount from Part I, line 27a	2	-94,071
3 Other increases not included in line 2 (itemize) ▶ _____	3	0
4 Add lines 1, 2, and 3	4	2,926,045
5 Decreases not included in line 2 (itemize) ▶ _____	5	0
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29 .	6	2,926,045

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	99,606
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	

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	2,438
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	2,438
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	2,438
6	Credits/Payments:		
a	2020 estimated tax payments and 2019 overpayment credited to 2020	6a	2,360
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	2,360
8	Enter any penalty for underpayment of estimated tax. Check here ☐ 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	78
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid .	10	
11	Enter the amount of line 10 to be: Credited to 2021 estimated tax ☐ Refunded ☐	11	

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
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. ☐ \$ 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
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) ☐			
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		No
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>CARR RIGGS AND INGRAM LLC</u> Telephone no. ► <u>(727) 446-0504</u>			

Located at ► 600 CLEVELAND ST SUITE 1000 CLEARWATER FL ZIP+4 ► 33755

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? <i>If "Yes," attach the statement required by Regulations section 53.4945–5(d).</i>	☐ 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? <i>If "Yes" to 6b, file Form 8870.</i>		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
NANCY ECKERD NICHOLS 600 CLEVELAND STREET CLEARWATER, FL 33755	PRESIDENT 4.00	0	0	0
ALLISON BINNICKER HILL 600 CLEVELAND STREET CLEARWATER, FL 33755	TREASURER/SECRETARY 4.00	0	0	0
CHARLES HART 600 CLEVELAND STREET CLEARWATER, FL 33755	VICE PRESIDENT 4.00	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	
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	4,389,260
b	Average of monthly cash balances.	1b	171,585
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	4,560,845
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	4,560,845
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	68,413
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	4,492,432
6	Minimum investment return. Enter 5% of line 5.	6	224,622

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	224,622
2a	Tax on investment income for 2020 from Part VI, line 5.	2a	2,438
b	Income tax for 2020. (This does not include the tax from Part VI.).	2b	
c	Add lines 2a and 2b.	2c	2,438
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	222,184
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	222,184
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	222,184

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	262,600
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	262,600
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	262,600

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				222,184
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.				
b From 2016. 21,168				
c From 2017. 8,292				
d From 2018.				
e From 2019. 39,386				
f Total of lines 3a through e.	68,846			
4 Qualifying distributions for 2020 from Part XII, line 4: ► \$ 262,600				
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.				222,184
e Remaining amount distributed out of corpus	40,416			
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	109,262			
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).	0			
9 Excess distributions carryover to 2021. Subtract lines 7 and 8 from line 6a.	109,262			
10 Analysis of line 9:				
a Excess from 2016. 21,168				
b Excess from 2017. 8,292				
c Excess from 2018.				
d Excess from 2019. 39,386				
e Excess from 2020. 40,416				

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

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	262,600
b <i>Approved for future payment</i>				
Total			▶ 3b	0

Enter gross amounts unless otherwise indicated.

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

Form **990-PF** (2020)

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

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

--	--	--

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

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

--	--	--

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.

2021-02-28

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 CATHERINE HAUG	Preparer's Signature	Date	Check if self-employed ☐	PTIN P01395474
Firm's name ▶ CARR RIGGS & INGRAM LLC				Firm's EIN ▶ 72-1396621
Firm's address ▶ 600 CLEVELAND STREET SUITE 1000 CLEARWATER, FL 33755				Phone no. (727) 446-0504

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>				
21ST CENTURY LEADERS 115 NEW STREET SUITE B DECATUR, GA 30030	NONE	PUBLIC CHARITY	EDUCATION	1,500
ACTION MINISTRIES GA 1700 CENTURY CIRCLE NE SUITE 200 ATLANTA, GA 30345	NONE	PUBLIC CHARITY	COMMUNITY	500
ADL - ANTI-DEFAMATION LEAGUE 605 THIRD AVENUE NEW YORK, NY 101583650	NONE	PUBLIC CHARITY	EDUCATION	1,000
Total ▶ 3a				262,600

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>				
ADVANCE HIGHLANDS EDUCATION COMMITTEE PO BOX 2095 HIGHLANDS, NC 28741	NONE	PUBLIC CHARITY	EDUCATION	1,000
ATLANTA MASTER CHORALE PO BOX 133201 ATLANTA, GA 30333	NONE	PUBLIC CHARITY	CULTURAL	1,000
BOYCE ANSLEY SCHOOL 120 RALPH MCGILL BLVD BLDG 3 STE B1 ATLANTA, GA 30308	NONE	PUBLIC CHARITY	EDUCATION	2,500
Total ▶ 3a				262,600

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>				
CASHIERS HISTORICAL SOCIETY 1940 HWY 107 S PO BOX 104 CASHIERS, NC 28717	NONE	PUBLIC CHARITY	EDUCATION	1,000
CATHEDRAL OF ST PHILLIP 2744 PEACHTREE RD NW ATLANTA, GA 30305	NONE	PUBLIC CHARITY	RELIGIOUS	12,500
CENTER FOR LIFE ENRICHMENT 348 SO 5TH STREET HIGHLANDS, SC 28741	NONE	PUBLIC CHARITY	CHARITABLE	10,000
Total ▶ 3a				262,600

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>				
CHESTNUT CREEK SCHOOL OF THE ARTS 100 N MAIN STREET GALAX, VA 24333	NONE	PUBLIC CHARITY	EDUCATION	250
CHILDREN'S HEALTHCARE OF ATLANTA UNIVERSITY OFFICE PARK - DARTMOUTH BUILDING 3395 NE EXPRESSWAY SUITE 1 ATLANTA, GA 30341	NONE	PUBLIC CHARITY	HEALTH	2,500
CHILDREN'S MUSEUM OF ATLANTA 275 CENTENNIAL OLYMPIC PARK DR NW ATLANTA, GA 30313	NONE	PUBLIC CHARITY	EDUCATION	1,000
Total ▶ 3a				262,600

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>				
CHURCH OF INCARNATION530 MAIN ST HIGHLANDS, NC 28741	NONE	PUBLIC CHARITY	RELIGIOUS	5,000
CHURCH OF THE GOOD SHEPHERD PO BOX 32 CASHIERS, NC 28717	NONE	PUBLIC CHARITY	RELIGIOUS	1,000
CLEARWATER FREE CLINIC 707 N FORT HARRISON AVE CLEARWATER, FL 33755	NONE	PUBLIC CHARITY	HEALTH	5,000
Total ▶ 3a				262,600

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>				
CLEARWATER MARINE AQUARIUM 249 WINDWARD PASSAGE CLEARWATER, FL 33767	NONE	PUBLIC CHARITY	EDUCATIONAL	1,000
CONCRETE JUNGLE 124 ESTORIA STREET ATLANTA, GA 30316	NONE	PUBLIC CHARITY	COMMUNITY	5,000
COVENANT HOUSE 1559 JOHNSON ROAD NORTHWEST ATLANTA, GA 30318	NONE	PUBLIC CHARITY	CHARITABLE	500
Total ▶ 3a				262,600

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>				
DARTMOUTH UNIVERSITY 6066 DEVELOPMENT OFFICE HANOVER, NH 03755	NONE	PUBLIC CHARITY	EDUCATIONAL	2,500
DUKE UNIVERSITY 324 BLACKWELL ST 920 DURHAM, NC 27701	NONE	PUBLIC CHARITY	EDUCATIONAL	5,000
ECKERD100 STARCREST DRIVE CLEARWATER, FL 33765	NONE	PUBLIC CHARITY	CHARITABLE	10,500
Total ▶ 3a				262,600

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>				
GEORGIA-NORTH CAROLINA BARTRAM TRAIL SOCIETY PO BOX 968 HIGHLANDS, NC 28741	NONE	PUBLIC CHARITY	COMMUNITY	100
HIGH MUSEUM OF ART 1280 WEST PEACHTREE STREET NW ATLANTA, GA 30309	NONE	PUBLIC CHARITY	CHARITABLE	37,000
HIGHLANDS BIOLOGICAL FOUNDATION 265 N 6TH STREET HIGHLANDS, NC 28741	NONE	PUBLIC CHARITY	MEDICAL	3,000
Total ▶ 3a				262,600

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>				
HIGHLANDS CASHIERS HOSPITAL 190 HOSPITAL DRIVE HIGHLANDS, NC 28741	NONE	PUBLIC CHARITY	MEDICAL	5,000
HIGHLANDS CASHIERS LAND TRUST 348 S 5TH STREET 211 HIGHLANDS, NC 28741	NONE	PUBLIC CHARITY	CHARITABLE	1,000
HIGHLANDS CLE348 S 5TH STREET HIGHLANDS, NC 28741	NONE	PUBLIC CHARITY	CHARITABLE	1,000
Total			▶ 3a	262,600

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>				
HIGHLANDS FIRE AND RESCUE 322 OAK ST HIGHLANDS, NC 28741	NONE	PUBLIC CHARITY	COMMUNITY	5,000
HIGHLANDS HISTORICAL SOCIETY PO BOX 670 HIGHLANDS, NC 28741	NONE	PUBLIC CHARITY	EDUCATIONAL	500
HIGHLANDS PACP O BOX 296 HIGHLANDS, NC 28741	NONE	PUBLIC CHARITY	CHARITABLE	10,000
Total ▶ 3a				262,600

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>				
HIGHLANDS POLICE FORCE372 OAK ST HIGHLANDS, NC 28741	NONE	PUBLIC CHARITY	COMMUNITY	1,000
JULIE'S DREAM3200 LEMONS RIDGE DR ATLANTA, GA 30339	NONE	PUBLIC CHARITY	RELIGIOUS	1,000
LEUKEMIA AND LYMPHOMA SOCIETY 3715 NORTHSIDE PARKWAY ATLANTA, GA 30324	NONE	PUBLIC CHARITY	CHARITABLE	250
Total ▶ 3a				262,600

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>				
LIVE FREE YOGA 841 FREDERICA ST NE APT 24 ATLANTA, GA 303064712	NONE	PUBLIC CHARITY	COMMUNITY	250
MOUNTAIN TOP ROTARY CLUB OF HIGHLANDS 520 MAIN STREET HIGHLANDS, NC 28741	NONE	PUBLIC CHARITY	COMMUNITY	500
NATIONAL INFANTRY MUSEUM 1775 LEGACY WAY COLUMBUS, GA 31903	NONE	PUBLIC CHARITY	EDUCATION	1,000
Total ▶ 3a				262,600

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>				
PUBLIC BROADCASTING ATLANTA 740 BISMARCK ROAD NE ATLANTA, GA 30324	NONE	PUBLIC CHARITY	CHARITABLE	1,000
REMERGE340 AUBURN AVE NE ATLANTA, GA 30312	NONE	PUBLIC CHARITY	COMMUNITY	1,000
RON CLARK ACADEMY 228 MARGARET STREET SE ATLANTA, GA 30315	NONE	PUBLIC CHARITY	EDUCATIONAL	25,500
Total ▶ 3a				262,600

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>				
SKYLAND TRAIL 1961 N DRUID HILLS ROAD NE ATLANTA, GA 30329	NONE	PUBLIC CHARITY	MEDICAL	15,000
SPECIAL OLYMPICS 1133 19TH STREET NW WASHINGTON, DC 20036	NONE	PUBLIC CHARITY	COMMUNITY	2,500
ST ANNE'S DAY SCHOOL 3098 ST ANNES LANE ATLANTA, GA 30327	NONE	PUBLIC CHARITY	RELIGIOUS	4,000
Total ▶ 3a				262,600

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>				
ST PAUL'S SCHOOL 1600 ST PAULS DRIVE CLEARWATER, FL 33764	NONE	PUBLIC CHARITY	EDUCATION	25,000
ST PAUL'S UNITED METHODIST CHURCH 1199 HIGHLAND AVE LARGO, FL 33770	NONE	PUBLIC CHARITY	RELIGIOUS	2,000
THE ARC TAMPA BAY FOUNDATION 1501 BELCHER RD NE CLEARWATER, FL 33765	NONE	PUBLIC CHARITY	CHARITABLE	1,500
Total ▶ 3a				262,600

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>				
THE BASCOM323 FRANKLIN ROAD HIGHLANDS, NC 28741	NONE	PUBLIC CHARITY	EDUCATIONAL	2,000
THE GIVING KITHCEN 900 DEKALB AVE NE ATLANTA, GA 30307	NONE	PUBLIC CHARITY	CHARITABLE	5,000
THE MOUNTAIN3872 DILLARD ROAD HIGHLANDS, NC 28741	NONE	PUBLIC CHARITY	EDUCATIONAL/CULTURAL	1,250
Total ▶ 3a				262,600

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>				
THEATRICAL OUTFIT 84 LUCKY STREET NW ATLANTA, GA 30303	NONE	PUBLIC CHARITY	CULTURAL	5,000
TOWN OF HIGHLANDSPO BOX 460 HIGHLANDS, NC 28741	NONE	PUBLIC CHARITY	COMMUNITY	31,000
TOYS FOR TOTS 3072 BILTMORE WOODS DR BUFORD, GA 30519	NONE	PUBLIC CHARITY	COMMUNITY	1,000
Total ▶ 3a				262,600

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>				
WHEELCHAIRS 4 KIDS 1976 S PINELLAS AVE TARPON SPRINGS, FL 34689	NONE	PUBLIC CHARITY	COMMUNITY	1,000
WREATHS ACROSS AMERICA4 POINT ST COLUMBIA FALLS, ME 04623	NONE	PUBLIC CHARITY	CHARITABLE	1,000
YMCA1160 MOORES MILL RD NW ATLANTA, GA 30327	NONE	PUBLIC CHARITY	EDUCATIONAL	1,000
Total ▶ 3a				262,600

TY 2020 Accounting Fees Schedule**Name:** THE H FOUNDATION

C/O CARR RIGGS & INGRAM LLC

EIN: 59-2947260

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	2,700	0		0

TY 2020 Explanation of Non-Filing with Attorney General Statement**Name:** THE H FOUNDATION

C/O CARR RIGGS & INGRAM LLC

EIN: 59-2947260**Statement:**

FLORIDA DOES NOT CURRENTLY REQUIRE THE FILING OF THE RETURN WITH THE ATTORNEY GENERAL.

TY 2020 Investments Corporate Stock Schedule

Name: THE H FOUNDATION
C/O CARR RIGGS & INGRAM LLC
EIN: 59-2947260

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ALPHABET INC	18,329	96,353
ALPHABET INC	34,107	157,738
AMAZON.COM INC	81,021	358,262
AMERICAN EXPRESS	59,008	120,910
AMERISOURCEBERGEN CO	84,093	97,760
ANALOG DEVICES INC	85,220	155,117
ARTISAN INTL VALUE FUND	39,288	58,015
BLACKROCK CORE BD TRUST	58,265	78,908
BLACKROCK CREDIT ALLOCAT	20,204	22,065
BLACKROCK INC	75,675	180,385
BLACKROCK LIMITED DURATI	32,660	31,840
BOOKING HOLDINGS INC	69,479	122,500
BRISTOL-MYERS SQUIB	91,125	111,654
CITIGROUP INC	119,886	110,988
COCA COLA COMPANY	59,816	109,680
COMCAST CORP	80,211	112,660
CVS HEALTH CORP	123,210	116,110
ENBRIDGE INC	79,456	63,980
JOHN HANCOCK	44,392	47,190
JOHNSON & JOHNSON	69,029	118,035
LOWES COMPANIES INC	68,893	136,434
MERCK & CO INC	101,862	102,250
MFS INTERMEDIATE INCOME	10,594	7,620
MSCI INC	24,620	178,612
NOVARTIS A G SPON ADR F	53,574	94,430
OLYMPUS CORP	57,859	132,060
ORACLE CORPORATION	57,711	90,566
PEPSICO INCORPORATED	62,063	133,470
PFIZER INCORPORATED	48,158	82,823
PIMCO DYNAMIC INCOME CF	27,608	26,430

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
PROCTER & GAMBLE	40,748	90,441
SANOFI SPOND	66,746	87,462
SEAGATE TECHNOLOGY	82,670	111,888
STARBUCKS CORP	93,016	117,678
TRINITY INDUSTRIES	56,609	79,170
UNITED PARCEL SERVICE	73,136	126,300
VIATRIS INC	2,640	5,228
VISA INC CL A	32,340	131,238
WESTERN ASSET INCOME CF	39,634	47,700
WESTERN ASSET PREMIER BO	28,400	28,340

TY 2020 Investments - Other Schedule**Name:** THE H FOUNDATION

C/O CARR RIGGS & INGRAM LLC

EIN: 59-2947260**Investments Other Schedule 2**

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
INVESCO BULLETSHARES 2021	AT COST	41,573	42,420
INVESCO BULLETSHARES 2022	AT COST	43,001	43,500
ISHARES CORE S&P ETF MIDCAP	AT COST	147,371	344,745
ISHARES CORE S&P SMALL CAP	AT COST	78,155	275,700
ISHARES TRT IS 5 10 INV	AT COST	12,114	12,358
REALITY INCOME CORP	AT COST	32,011	62,170

TY 2020 Other Professional Fees Schedule**Name:** THE H FOUNDATION

C/O CARR RIGGS & INGRAM LLC

EIN: 59-2947260

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	26,950	26,950		0

TY 2020 Taxes Schedule**Name:** THE H FOUNDATION

C/O CARR RIGGS & INGRAM LLC

EIN: 59-2947260**Taxes Schedule**

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL TAX PAID	3,570	0		0
FOREIGN TAXES PAID	3,237	3,237		0