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
MICHAEL TUCH FOUNDATION INC

A Employer identification number
13-6002848

Number and street (or P.O. box number if mail is not delivered to street address)
124 SOUTH PINE AVE

Room/suite

B Telephone number (see instructions)
(518) 727-2010

City or town, state or province, country, and ZIP or foreign postal code
ALBANY, NY 12208

C If exemption application is pending, check here ▶ ☐

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity
☐ Final return ☐ Amended return
☐ Address change ☐ Name change

D 1. Foreign organizations, check here............ ▶ ☐

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

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

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

I Fair market value of all assets at end of year (from Part II, col. (c), *line 16)* ▶$ 7,417,377

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

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

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

	Line	Description	(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)	102,969			
	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 . . .	205,683	204,450		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	87,046			
	b	Gross sales price for all assets on line 6a 2,437,754				
	7	Capital gain net income (from Part IV, line 2) . . .		87,046		
	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)				
	11	Other income (attach schedule)				
	12	**Total.** Add lines 1 through 11	395,698	291,496		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc.	16,623	4,156		12,467
	14	Other employee salaries and wages		0	0	0
	15	Pension plans, employee benefits		0	0	
	16a	Legal fees (attach schedule)				0
	b	Accounting fees (attach schedule)	1,000	0	0	1,000
	c	Other professional fees (attach schedule)	39,735	39,735		0
	17	Interest				0
	18	Taxes (attach schedule) (see instructions) . . .	20,712	595		0
	19	Depreciation (attach schedule) and depletion . . .	0	0		
	20	Occupancy				
	21	Travel, conferences, and meetings		0	0	
	22	Printing and publications		0	0	
	23	Other expenses (attach schedule)	3,050	700		2,350
	24	**Total operating and administrative expenses.** Add lines 13 through 23	81,120	45,186	0	15,817
	25	Contributions, gifts, grants paid	504,500			504,500
	26	**Total expenses and disbursements.** Add lines 24 and 25	585,620	45,186	0	520,317
	27	Subtract line 26 from line 12:				
	a	**Excess of revenue over expenses and disbursements**	-189,922			
	b	**Net investment income** (if negative, enter -0-)		246,310		
	c	**Adjusted net income** (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
Assets	1	Cash—non-interest-bearing	146	356,741	356,741
	2	Savings and temporary cash investments			
	3	Accounts receivable ▶			
		Less: allowance for doubtful accounts ▶		0	0
	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 ▶ 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)		1,453,433	2,599,059
	c	Investments—corporate bonds (attach schedule)		1,854,047	2,287,274
	11	Investments—land, buildings, and equipment: basis ▶			
		Less: accumulated depreciation (attach schedule) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	5,387,086	1,531,082	2,174,303
	14	Land, buildings, and equipment: basis ▶			
		Less: accumulated depreciation (attach schedule) ▶			
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers—see the instructions. Also, see page 1, item I)	5,387,232	5,195,303	7,417,377
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	
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	5,387,232	5,195,303	
	27	Paid-in or capital surplus, or land, bldg., and equipment fund			
	28	Retained earnings, accumulated income, endowment, or other funds			
	29	**Total net assets or fund balances** (see instructions)	5,387,232	5,195,303	
	30	**Total liabilities and net assets/fund balances** (see instructions)	5,387,232	5,195,303	

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	5,387,232
2	Enter amount from Part I, line 27a	2	-189,922
3	Other increases not included in line 2 (itemize) ▶	3	0
4	Add lines 1, 2, and 3	4	5,197,310
5	Decreases not included in line 2 (itemize) ▶	5	2,007
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29	6	5,195,303

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	212. ABBOTT LABORATORIES COM	P	2019-03-19	2020-06-30
b	195. AMEREN CORPORATION	P	2019-05-10	2020-06-12
c	330. AMEREN CORPORATION	P		2020-06-30
d	90. AMERICAN WATER WORKS CO INC	P	2020-06-12	2020-07-28
e	70. AMGEN INC COM	P	2019-01-03	2020-07-30
	27. AMGEN INC COM	P	2019-04-16	2020-07-30
	123. AUTOMATIC DATA PROCESSING INC	P	2003-02-14	2020-03-02
	155. CME GROUP INC	P	2020-04-16	2020-06-12
	635. CMS ENERGY CORP	P		2020-07-28
	159. CMS ENERGY CORP	P	2020-06-12	2020-07-28
	581. CMS ENERGY CORP	P	2019-01-28	2020-07-28
	514. CVS CORP COM	P		2020-07-28
	125. CVS CORP COM	P		2020-07-28
	CAMECO CORP	P	2019-11-17	2020-07-28
	359. CONAGRA FOODS, INC	P	2019-02-22	2020-07-28
	425. CONAGRA FOODS, INC	P		2020-07-28
	673. CONAGRA FOODS, INC	P	2019-11-17	2020-07-28
	CROWN CASTLE INTERNATIONAL CORP	P	2020-06-12	2020-10-21
	425. CULLEN FROST BANKERS INC	P	2019-01-03	2020-07-28
	483. DISCOVER FINANCIAL SERVICES	P	2020-06-12	2020-07-28
	759. EMERSON ELECTRIC COM	P	2020-06-12	2020-07-28
	235. EMERSON ELECTRIC COM	P	2019-06-06	2020-07-28
	6530. FLEXSHARES INT QUALITY DIVIDEND INDEX FD	P	2019-09-01	2020-04-16
	380. HELMERICH & PAYNE INC	P	2019-02-22	2020-04-16
	52. HONEYWELL INTERNATIONAL INC	P	2019-01-03	2020-10-21
	335. INTEL CORP	P	2020-06-12	2020-10-21
	133. INTEL CORP	P	2019-11-17	2020-10-21
	INTUIT	P	2019-11-17	2020-06-30
	6985. ISHARES EMERGING MARKETS DIVIDEND ETF	P		2020-04-16
	70. ISHARES S&P SMALLCAP 600 INDEX CLOSED END FUND	P	2017-10-27	2020-04-16
	2055. ISHARES CORE MSCI EAFE ETF $1.58000	P		2020-04-16
	4025. JPMORGAN ALERIAN MLP INDEX ETN $1.18900	P		2020-10-01
	56. JOHNSON & JOHNSON	P	2019-03-20	2020-06-30
	1510. KINDER MORGAN INC	P	2019-02-22	2020-04-16
	340. MARATHON PETROLEUM CORP	P	2019-02-22	2020-04-16
	566. MARATHON PETROLEUM CORP	P	2020-06-12	2020-10-21
	602. MICROSOFT CORP	P	2008-11-25	2020-01-17
	617. MICROSOFT CORP	P	2008-12-29	2020-01-17
	186. MONDELEZ INTERNATIONAL INC	P	2020-04-16	2020-06-12
	71. MONDELEZ INTERNATIONAL INC	P	2019-01-17	2020-06-12
	120000. MORGAN STANLEY DTD 7/26/2010 5.50000% 7/24/2020	P	2018-09-10	2020-07-24
	36. NEXTERA ENERGY INC	P	2019-05-10	2020-06-12
	1505. NISOURCE INC	P		2020-06-12
	420. OCCIDENTAL PETE CORP DEL	P	2019-02-22	2020-04-16
	305. PNC FINANCIAL SERVICES GROUP	P	2019-01-03	2020-06-12
	716. PEPSICO INC COM	P		2020-01-17
	379. PEPSICO INC COM	P	2000-04-04	2020-01-17
	1705. PFIZER INC	P		2020-01-17
	445. PFIZER INC	P	2020-04-16	2020-06-12
	205. PHILIP MORRIS INTERNATIONAL INC	P	2019-01-17	2020-06-30
	155. PROCTER & GAMBLE CO COM	P	2020-04-16	2020-06-12
	80. PROLOGIS INC	P	2020-06-12	2020-10-21
	405. REALTY INCOME CORP	P	2020-04-16	2020-06-12
	240. REALTY INCOME CORP	P	2019-05-10	2020-06-12
	153. REPUBLIC SERVICES INC	P	2019-01-03	2020-07-28
	271. REPUBLIC SERVICES INC	P	2019-11-17	2020-10-21
	SEMPRA ENERGY	P		2020-09-12
	1210. SYSCO CORP COM	P	2003-02-14	2020-07-28
	750. SYSCO CORP COM	P		2020-03-02
	TEXAS INSTRUMENTS INC COM	P	2019-11-17	2020-06-12
	80. V F CORP	P	2019-02-22	2020-01-17
	390. VERIZON COMMUNICATIONS INC	P	2019-02-22	2020-07-28
	450. WELLTOWER INC	P		2020-06-12
	518. WISDOMTREE U.S. MIDCAP DIVIDEND FUND $5.74200	P	2019-11-18	2020-01-17
	5637. WISDOMTREE U.S. MIDCAP DIVIDEND FUND $6.74200	P	2019-01-28	2020-04-16
	623. WISDOMTREE U.S. SMALLCAP DIVIDEND	P	2019-11-18	2020-01-17
	5477. WISDOMTREE U.S. SMALLCAP DIVIDEND	P	2019-01-28	2020-04-16
	135. XYLEM INC	P	2019-06-06	2020-07-28
	186. LYONDELLBASELL INDUSTRIES N V	P	2019-04-01	2020-07-28
	CAPITAL GAIN DIVIDENDS	P		
	CAPITAL GAIN DIVIDENDS	P		
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	(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	10,104		8,511	1,593
b	13,953		14,206	-253
c	23,094		22,245	849
d	12,945		11,523	1,422
e	17,274		13,342	3,932
	6,663		6,236	427
	50,931		8,158	42,773
	27,195		28,878	-1,683
	39,819		33,453	6,366
	9,970		9,292	678
	38,130		33,954	4,176
	32,063		32,792	-729
	7,797		7,951	-154
	34,631		44,039	-9,408
	13,240		11,718	1,522
	15,674		9,063	6,611
	25,074		21,739	3,335
	15,967		11,729	4,238
	30,302		38,183	-7,881
	24,690		24,806	-116
	47,846		46,502	1,344
	14,814		14,709	105
	117,359		152,890	-35,531
	6,148		21,019	-14,871
	9,013		6,774	2,239
	18,040		19,810	-1,770
	7,162		6,451	711
	30,778		22,250	8,528
	206,217		287,537	-81,320
	6,009		5,238	771
	103,631		129,849	-26,218
	43,014		105,954	-62,940
	8,049		8,020	29
	21,366		28,486	-7,120
	7,556		22,167	-14,611
	16,380		20,330	-3,950
	100,755		11,313	89,442
	101,789		11,595	90,194
	9,479		9,958	-479
	3,618		3,062	556
	120,000		120,000	
	9,978		6,877	3,101
	30,068		35,578	-5,510
	5,304		27,808	-22,504
	33,529		36,369	-2,840
	100,281		27,850	72,431
	50,945		14,104	36,841
	57,072		71,261	-14,189
	14,896		15,934	-1,038
	23,680		24,681	-1,001
	18,204		18,725	-521
	7,007		6,390	617
	24,190		9,315	14,875
	14,335		16,119	-1,784
	12,979		10,827	2,152
	24,996		19,177	5,819
	25,447		24,327	1,120
	100,561		34,994	65,567
	51,152		21,690	29,462
	19,347		15,115	4,232
	7,517		6,532	985
	22,233		22,249	-16
	24,269		34,359	-10,090
	20,025		17,866	2,159
	139,062		194,420	-55,358
	17,986		16,946	1,040
	97,033		148,974	-51,941
	9,984		10,513	-529
	12,860		15,976	-3,116
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Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
a				1,593
b				-253
c				849
d				1,422
e				3,932
				427
				42,773
				-1,683
				6,366
				678
				4,176
				-729
				-154
				-9,408
				1,522
				6,611
				3,335
				4,238
				-7,881
				-116
				1,344
				105
				-35,531
				-14,871
				2,239
				-1,770
				711
				8,528
				-81,320
				771
				-26,218
				-62,940
				29
				-7,120
				-14,611
				-3,950
				89,442
				90,194
				-479
				556
				3,101
				-5,510
				-22,504
				-2,840
				72,431
				36,841
				-14,189
				-1,038
				-1,001
				-521
				617
				14,875
				-1,784
				2,152
				5,819
				1,120
				65,567
				29,462
				4,232
				985
				-16
				-10,090
				2,159
				-55,358
				1,040
				-51,941
				-529
				-3,116

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	87,046
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8		3	

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

SECTION 4940(e) REPEALED ON DECEMBER 20, 2019 - DO NOT COMPLETE

1 Reserved

(a) Reserved	(b) Reserved	(c) Reserved	(d) Reserved

2 Reserved	2	
3 Reserved.	3	
4 Reserved	4	
5 Reserved	5	
6 Reserved	6	
7 Reserved	7	
8 Reserved	8	

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter: ________ **(attach copy of letter if necessary–see instructions)**		
b	Reserved	1	3,424
c	All other domestic foundations enter 1.39% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3	Add lines 1 and 2	3	3,424
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0
5	**Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-	5	3,424
6	Credits/Payments:		
a	2020 estimated tax payments and 2019 overpayment credited to 2020	6a	4,372
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	4,372
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	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	948
11	Enter the amount of line 10 to be: **Credited to 2021 estimated tax** ▶ 856 **Refunded** ▶	11	92

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition).	1b		No
	*If the answer is "Yes" to **1a** or **1b,** attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation. ▶ $ ________ **(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? *If "Yes," attach a detailed description of the activities.*	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T.*	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XV.*	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ NY			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation*	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2020 or the taxable year beginning in 2020? See the instructions for Part XIV. If "Yes," complete Part XIV	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses.*	10		No

Part VII-A Statements Regarding Activities (continued)

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

Website address ▶

14 The books are in care of ▶KEYBANK NA Telephone no. ▶(216) 813-4618

Located at ▶4900 TIEDEMAN ROAD BROOKLYN OH ZIP+4 ▶44144

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** —check here ▶ ☐

and enter the amount of tax-exempt interest received or accrued during the year ▶ | 15 |

			Yes	No
16	At any time during calendar year 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		No
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign			

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

			Yes	No
	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):			
	(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**		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No			
	If "Yes," attach the statement required by Regulations section 53.4945–5(d).			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☑ No			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	**6b**		No
	If "Yes" to 6b, file Form 8870.			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☑ No			
b	If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?	**7b**		
8	Is the foundation subject to the section 4960 tax on payment(s) of more than $1,000,000 in remuneration or excess parachute payment during the year? ☐ Yes ☑ No			

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

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

(a) Name and address	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation **(If not paid, enter -0-)**	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
MARTHA TUCK ROZETT 124 SOUTH PINE AVE ALBANY, NY 12208	PRESIDENT 1	16,623		
JONATHAN S TUCK 124 SOUTH PINE AVE ALBANY, NY 12208	VICE PRESIDENT 1	0		
JOSHUA S ROZETT 124 SOUTH PINE AVE ALBANY, NY 12208	SECRETARY 1	0		
JOHN M ROZETT 124 SOUTH PINE AVE ALBANY, NY 12208	TREASURER 1	0		
DANIEL H TUCK 124 SOUTH PINE AVE ALBANY, NY 12208	DIRECTOR 1	0		
ALEXANDER TUCK ROZETT 124 SOUTH PINE AVE ALBANY, NY 12208	DIRECTOR 1	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 . . . . ▶	

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	6,405,934
b	Average of monthly cash balances	1b	538,930
c	Fair market value of all other assets (see instructions)	1c	0
d	**Total** (add lines 1a, b, and c)	1d	6,944,864
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	6,944,864
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	104,173
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	6,840,691
6	**Minimum investment return.** Enter 5% of line 5	6	342,035

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	342,035
2a	Tax on investment income for 2020 from Part VI, line 5 — 2a: 3,424		
b	Income tax for 2020. (This does not include the tax from Part VI.) — 2b:		
c	Add lines 2a and 2b	2c	3,424
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	338,611
4	Recoveries of amounts treated as qualifying distributions	4	0
5	Add lines 3 and 4	5	338,611
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	338,611

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	520,317
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	0
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	0
b	Cash distribution test (attach the required schedule)	3b	0
4	**Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	520,317
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	520,317

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				338,611
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. 0				
b From 2016. 0				
c From 2017. 79,712				
d From 2018. 84,008				
e From 2019. 121,641				
f **Total** of lines 3a through e.	285,361			
4 Qualifying distributions for 2020 from Part XII, line 4: ▶ $ 520,317				
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				338,611
e Remaining amount distributed out of corpus	181,706			
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	467,067			
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	467,067			
10 Analysis of line 9:				
a Excess from 2016 0				
b Excess from 2017 79,712				
c Excess from 2018. . . . 84,008				
d Excess from 2019 121,641				
e Excess from 2020 181,706				

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			(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					

Part XV **Supplementary Information (Complete this part only if the foundation had $5,000 or more in assets at any time during the year—see instructions.)**

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than $5,000). (See section 507(d)(2).)

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

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

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

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

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

c Any submission deadlines:

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

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
MINT THEATER COMPANY 412 W 42ND ST NEW YORK,NY 10036	NONE	PC	GENERAL	12,000
LEAP LEARNING THROUGH 535 EIGHTH AVE SUITE 1100 NEW YORK,NY 10018	NONE	PC	GENERAL	5,000
THEATRE FOR A NEW AUDIENCE 262 ASHLAND PL BROOKLYN,NY 11217	NONE	PC	GENERAL	10,000
SYMPHONY SPACE UPPER LEVEL 2537 BROADWAY NEW YORK,NY 10025	NONE	PC	GENERAL	10,000
S'COOL SOUNDS 111 2ND PL BROOKLYN,NY 11231	NONE	PC	GENERAL	5,000
ROUNDABOUT THEATRE COMPANY 231 W 39TH ST NEW YORK,NY 10018	NONE	PC	GENERAL	10,000
RED BULL THEATER 191 7TH AVE 2S NEW YORK,NY 10011	NONE	PC	GENERAL	10,000
PAPER BAGS PLAYERS 131 VARICK ST SUITE 1001 NEW YORK,NY 10013	NONE	PC	GENERAL	6,000
THE PALEY CENTER FOR MEDIA 25 W 52ND ST NEW YORK,NY 10019	NONE	PC	GENERAL	7,000
NEW YORK THEATRE WORKSHOP 79 E 4TH ST NEW YORK,NY 10003	NONE	PC	GENERAL	8,000
NEW YORK CITY CENTER 131 W 55TH ST NEW YORK,NY 10019	NONE	PC	GENERAL	7,000
LINCOLN CENTER THEATER 150 W 65TH ST NEW YORK,NY 10023	NONE	PC	GENERAL	10,000
DOROT 171 W 85TH ST NEW YORK,NY 10024	NONE	PC	GENERAL	5,000
CLASSIC STAGE COMPANY 136 E 13TH ST NEW YORK,NY 10003	NONE	PC	GENERAL	7,000
CITY PARKS FOUNDATION 830 5TH AVE NEW YORK,NY 10065	NONE	PC	GENERAL	5,000
BROOKLYN YOUTH CHORUS ACADEMY 179 PACIFIC ST BROOKLYN,NY 11201	NONE	PC	GENERAL	7,500
BRONX ARTS ENSEMBLE 80 VAN CORTLANDT PARK S D2 BRONX,NY 10463	NONE	PC	GENERAL	6,000
ATLANTIC THEATRE COMPANY PO BOX 4302 CLIFTON,NJ 07012	NONE	PC	GENERAL	8,000
CITY ARTS 77 BLEECKER ST SUITE C2-18 NEW YORK,NY 10012	NONE	PC	GENERAL	12,000
SECOND STAGE 1501 BROADWAY SUITE 518 NEW YORK,NY 10036	NONE	PC	GENERAL	12,000
PUBLICOLOR 20 W 36TH ST 9TH FLOOR NEW YORK,NY 10018	NONE	PC	GENERAL	15,000
EPIC THEATRE ENSEMBLE 410 W 42ND ST 4 NEW YORK,NY 10036	NONE	PC	GENERAL	15,000
WOMEN'S PRISON ASSOCIATION 110 2ND AVE NEW YORK,NY 10003	NONE	PC	GENERAL	10,000
STATEN ISLAND ARTS 7 NAVY PIER CT STATEN ISLAND,NY 10304	NONE	PC	GENERAL	5,000
QUEENS BOTANICAL GARDEN 43-50 MAIN ST FLUSHING,NY 11355	NONE	PC	GENERAL	7,000
NEW YORK HISTORICAL SOCIETY	NONE	PC	GENERAL	7,000

170 CENTRAL PARK WEST NEW YORK,NY 10024				
MANHATTAN THEATRE CLUB 311 WEST 43RD ST 8TH FLOOR NEW YORK,NY 10036	NONE	PC	GENERAL	10,000
IRISH REPERTORY THEATRE 132 WEST 22ND STREET NEW YORK,NY 10011	NONE	PC	GENERAL	10,000
INTREPID SEA AIR AND SPACE MUSEUM PIER 86 W 46TH ST NEW YORK,NY 10036	NONE	PC	GENERAL	7,000
GINGOLD THEATRICAL GROUP 520 8TH AVE 304 NEW YORK,NY 10018	NONE	PC	GENERAL	10,000
FUTURES AND OPTIONS 120 BROADWAY 1019 NEW YORK,NY 10271	NONE	PC	GENERAL	5,000
ART-NEW YORK 520 8TH AVE SUITE 319 BROOKLYN,NY 11217	NONE	PC	GENERAL	10,000
EDUCATION THROUGH MUSIC 122 E 42ND ST 1501 NEW YORK,NY 10168	NONE	PC	GENERAL	10,000
FIASCO THEATER PO BOX 291 NEW YORK,NY 10276	NONE	PC	GENERAL	5,000
YORK THEATER COMPANY 619 LEXINGTON AVE NEW YORK,NY 10022	NONE	PC	GENERAL	7,000
WORKING THEATER 520 8TH AVE NEW YORK,NY 10018	NONE	PC	GENERAL	5,000
WATERFRONT MUSEUM 290 CONOVER ST BROOKLYN,NY 11231	NONE	PC	GENERAL	5,000
URBAN STAGES 259 W 30TH ST NEW YORK,NY 10001	NONE	PC	GENERAL	7,000
SEARCH AND CARE 1844 2ND AVE NEW YORK,NY 10128	NONE	PC	GENERAL	10,000
ST GEORGE THEATRE 35 HYATT ST STATEN ISLANED,NY 10301	NONE	PC	GENERAL	7,500
PROSPECT THEATER 520 8TH AVE NEW YORK,NY 10018	NONE	PC	GENERAL	10,000
PHOENIX THEATRE 1825 N CENTRAL AVE PHOENIX,AZ 85004	NONE	PC	GENERAL	4,000
NEW YORK CITY CHILDREN'S THEATRE 340 E 46TH ST NEW YORK,NY 10017	NONE	PC	GENERAL	10,000
NATIONAL DANCE INSTITUTE 217 W 147TH ST NEW YORK,NY 10039	NONE	PC	GENERAL	10,000
KAUFMAN MUSIC CENTER 129 W 67TH ST NEW YORK,NY 10023	NONE	PC	GENERAL	7,500
THE HOPE PROGRAM 1 SMITH ST 4TH FLOOR BROOKLYN,NY 11201	NONE	PC	GENERAL	10,000
FRIENDS OF THE ISLAND COMPANY PO BOX 133 MARCO ISLAN,FL 34146	NONE	PC	GENERAL	5,000
CORA DANCE 358 VAN BRUNT ST BROOKLYN,NY 11231	NONE	PC	GENERAL	5,000
BROOKLYN HISTORICAL SOCIETY 128 PIERREPONT ST BROOKLYN,NY 11201	NONE	PC	GENERAL	10,000
BROOKLYN BOTANICAL GARDEN 990 WASHINGTON AVE BROOKLYN,NY 11225	NONE	PC	GENERAL	8,000
BALLET TECH 890 BROADWAY NEW YORK,NY 10003	NONE	PC	GENERAL	5,000
AVENUES FOR JUSTICE 100 CENTRE STREET ROOM 1541 NEW YORK,NY 10013	NONE	PC	GENERAL	10,000
THIRD STREET MUSIC SCHOOL SETTLEMENT 235 E 11TH ST NEW YORK,NY 10003	NONE	PC	GENERAL	15,000

STATEN ISLAND MUSEUM 1000 RICHMOND TERRACE STATEN ISLAND,NY 10301	NONE	PC	GENERAL	5,000
ST ANN'S WAREHOUSE 45 WATER ST BROOKLYN,NY 11201	NONE	PC	GENERAL	5,000
NEW YORK CLASSICAL THEATRE 64 FULTON ST 1108 NEW YORK,NY 10038	NONE	PC	GENERAL	5,000
NEW YORK BOTANICAL GARDEN 2900 SOUTHERN BLVD THE BRONX,NY 10458	NONE	PC	GENERAL	5,000
MUSEUM OF THE CITY OF NEW YORK 1220 5TH AVE NEW YORK,NY 10029	NONE	PC	GENERAL	5,000
MOSHOLU MENTEFIORE COMMUNITY CENTER 3450 DEKALB AVE BRONX,NY 10467	NONE	PC	GENERAL	10,000
METROPOLITAN MUSEUM OF ART 1000 5TH AVE NEW YORK,NY 10028	NONE	PC	GENERAL	5,000
THE JEWISH MUSEUM 1109 5TH AVE NEW YORK,NY 10128	NONE	PC	GENERAL	5,000
HARLEM CHILDREN'S ZONE 35 EAST 125TH ST NEW YORK,NY 10035	NONE	PC	GENERAL	10,000
GREEN GUERILLAS 30 THIRD AVE ROOM 848 BROOKLYN,NY 11217	NONE	PC	GENERAL	5,000
LOWER EASTSIDE TENEMENT MUSEUM 103 ORCHARD ST NEW YORK,NY 10002	NONE	PC	GENERAL	5,000
Total . . . . . ▶ **3a**				504,500
b *Approved for future payment*				
Total . . . . . ▶ **3b**				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions.)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments. . . .					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	205,683	
5 Net rental income or (loss) from real estate:					
a Debt-financed property.					
b Not debt-financed property.					
6 Net rental income or (loss) from personal property					
7 Other investment income.					
8 Gain or (loss) from sales of assets other than inventory			18	87,046	
9 Net income or (loss) from special events:					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue: a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e). .				292,729	

13 **Total.** Add line 12, columns (b), (d), and (e). 13 292,729

(See worksheet in line 13 instructions to verify calculations.)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)

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

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

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

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

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

b If "Yes," complete the following schedule.

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

Sign Here

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

Signature of officer or trustee | Date 2021-04-29 | 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
JEFFREY E KUHLIN		2021-04-29	☑	P00353001

Firm's name ▶ PRICEWATERHOUSECOOPERS LLP | Firm's EIN ▶13-4008324

Firm's address ▶ 1850 N CENTRAL AVE STE 700 PHOENIX, AZ 85004 | Phone no. (412) 355-6000

Additional Data

Return to Form

Software ID:
Software Version:

Form 990PF - Special Condition Description:

Special Condition Description

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

Schedule of Contributors

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

OMB No. 1545-0047

2020

Name of the organization
MICHAEL TUCH FOUNDATION INC

Employer identification number
13-6002848

Organization type (check one):

Filers of:	**Section:**
Form 990 or 990-EZ	☐ 501(c)( ) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☑ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

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

General Rule

☑ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling $5,000 or more (in money or other property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the $33^{1}/_{3}$% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than $1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling $5,000 or more during the year . . . . ▶ $ ____________

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization	Employer identification number
MICHAEL TUCH FOUNDATION INC	13-6002848

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	TUCH UW MICHAEL TUCH PARAGRAPH SEVENTH C/O KEYBANK N A TRUSTEE 4900 TIEDEMAN RD BROOKLYN, O H 44144	$ 102,969	☑ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
-		$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)

Name of organization	Employer identification number
MICHAEL TUCH FOUNDATION INC	13-6002848

Part II **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

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

Name of organization
MICHAEL TUCH FOUNDATION INC

Employer identification number
13-6002848

Part III ***Exclusively*** **religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than $1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of $1,000 or less for the year. (Enter this information once. See instructions.)** ▶ $

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-			

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
-	

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-			

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
-	

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-			

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
-	

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-			

(e) Transfer of gift

Transferee's name, address, and ZIP 4	Relationship of transferor to transferee
-	

Additional Data

Return to Form

Software ID:

Software Version:

TY 2020 IRS 990 e-File Render

Name: MICHAEL TUCH FOUNDATION INC

EIN: 13-6002848

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREPARATION FEE (NON-ALLOC	1,000			1,000

TY 2020 IRS 990 e-File Render

Name: MICHAEL TUCH FOUNDATION INC

EIN: 13-6002848

Name of Bond	End of Year Book Value	End of Year Fair Market Value
59156RAJ7 METLIFE INC SENIOR B	209,364	304,226
61747WAL3 MORGAN STANLEY SENIO	48,948	51,470
46625HHF0 JPMORGAN CHASE & CO	238,640	379,380
949746JM4 WELLS FARGO & CO SEN	108,843	164,171
983024AL4 WYETH L L C SENIOR B	169,153	253,603
46138G805 INVESCO TAXABLE MUNI	30,080	33,500
592905509 METROPOLITAN WEST T/	388,403	393,358
72201U638 PIMCO MORTAGE OPPORT	173,670	174,140
74256W584 PRINCIPAL MIDCAP FUN	172,203	205,486
957663503 WESTERN ASSET CORE P	314,743	327,940

TY 2020 IRS 990 e-File Render

Name: MICHAEL TUCH FOUNDATION INC

EIN: 13-6002848

Name of Stock	End of Year Book Value	End of Year Fair Market Value
871829107 SYSCO CORP COM	84,522	217,211
89352HAB5 TRANSCANADA PIPELINE	198,003	270,016
002824100 ABBOTT LABS COM	73,132	114,527
00770G847 JOHCM INTERNATIONAL	98,063	136,925
02079K305 ALPHABET INC COM CL	20,805	24,537
037833100 APPLE INC COM	20,157	22,955
166764100 CHEVRON CORP COM	80,694	74,907
25746U109 DOMINION ENERGY INC	37,764	35,269
291011104 EMERSON ELEC CO COM	28,489	37,372
412295107 HARDING LOEVNER INTL	50,000	58,000
46625H100 JP MORGAN CHASE & CO	127,593	166,970
500754106 KRAFT HEINZ CO COM	48,011	49,183
552983470 MFS RESEARCH INTERNA	50,000	56,723
594918104 MICROSOFT CORP COM	58,179	688,612
65339F101 NEXTERA ENERGY INC C	42,548	66,040
690742101 OWENS CORNING INC CO	19,670	20,682
744320102 PRUDENTIAL FINANCIAL	79,656	85,252
75513E101 RAYTHEON TECHNOLOGIE	44,858	50,915
824348106 SHERWIN WILLIAMS CO	34,209	52,179
883556102 THERMO FISHER SCIENT	71,317	125,761
931142103 WALMART INC	59,428	77,264
955306105 WEST PHARMACEUTICAL	53,190	81,027
962879102 WHEATON PRECIOUS MET	26,549	20,035
98419M100 XYLEM INC COM	26,515	40,207
N53745100 LYONDELLBASELL INDUS	20,081	26,490

Name: MICHAEL TUCH FOUNDATION INC

EIN: 13-6002848

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
SEE ATTACHED STMT			
00206R102 AT&T INC COM	AT COST	47,095	39,689
023135106 AMAZON COM INC COM	AT COST	33,123	55,368
030420103 AMERICAN WATER WORKS	AT COST	37,640	45,120
032095101 AMPHENOL CORP COM CL	AT COST	15,157	20,662
053015103 AUTOMATIC DATA PROCE	AT COST	32,357	228,531
060505104 BANK OF AMERICA CORP	AT COST	112,978	139,123
11135F101 BROADCOM INC COM	AT COST	36,667	42,909
12572Q105 CME GROUP INC COM	AT COST	86,023	86,838
17275R102 CISCO SYS INC COM	AT COST	47,335	47,883
20030N101 COMCAST CORP COM CL	AT COST	40,036	54,339
22822V101 CROWN CASTLE INTERNA	AT COST	50,385	63,198
231021106 CUMMINS INC COM	AT COST	24,069	24,527
254687106 WALT DISNEY CO COM	AT COST	37,451	59,065
254709108 DISCOVER FINANCIAL S	AT COST	34,062	57,305
256677105 DOLLAR GENERAL CORP	AT COST	32,112	43,953
437076102 HOME DEPOT INC COM	AT COST	47,965	50,733
438516106 HONEYWELL INTERNATIO	AT COST	33,931	52,324
443510607 HUBBELL INC COM	AT COST	38,292	48,448
458140100 INTEL CORP COM	AT COST	25,802	26,504
464287804 ISHARES CORE S&P SMA	AT COST	149,234	223,593
464288687 ISHARES PREFERRED &	AT COST	230,140	236,837
478160104 JOHNSON & JOHNSON CO	AT COST	54,030	93,012
580135101 MCDONALDS CORP COM	AT COST	45,162	46,993
609207105 MONDELEZ INTERNATION	AT COST	33,308	39,467
67066G104 NVIDIA CORP COM	AT COST	24,973	24,021
701094104 PARKER HANNIFIN CORP	AT COST	16,909	20,703
713448108 PEPSICO INC COM	AT COST	35,726	142,368
742718109 PROCTER & GAMBLE CO	AT COST	57,923	79,727
74340W103 PROLOGIS INC REIT	AT COST	44,545	47,936
760759100 REPUBLIC SERVICES IN	AT COST	26,652	33,127

TY 2020 IRS 990 e-File Render

Name: MICHAEL TUCH FOUNDATION INC

EIN: 13-6002848

Description	Amount
COST ADJUSTMENT FOR RETURN OF CAPITAL	2,007

TY 2020 IRS 990 e-File Render

Name: MICHAEL TUCH FOUNDATION INC

EIN: 13-6002848

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
STATE FILING FEE	250	0		250
PAYROLL WITHHOLDING	2,800	700		2,100

TY 2020 IRS 990 e-File Render

Name: MICHAEL TUCH FOUNDATION INC

EIN: 13-6002848

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMNT MNGMNT FEES (NON-DED	39,735	39,735		

TY 2020 IRS 990 e-File Render

Name: MICHAEL TUCH FOUNDATION INC

EIN: 13-6002848

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	16	16		0
FEDERAL TAX PAYMENT - PRIOR YE	15,745	0		0
FEDERAL ESTIMATES - PRINCIPAL	4,372	0		0
FOREIGN TAXES ON QUALIFIED FOR	519	519		0
FOREIGN TAXES ON NONQUALIFIED	60	60		0