

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

Name of foundation WYSS FOUNDATION		A Employer identification number 25-1823874	
% MOLLY MCUSIC			
Number and street (or P.O. box number if mail is not delivered to street address) 1759 R STREET NW	Room/suite	B Telephone number (see instructions) (202) 232-4418	
City or town, state or province, country, and ZIP or foreign postal code WASHINGTON, DC 20009		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) ▶\$ <u>2,420,473,004</u>		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)</i>			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc., received (attach schedule)	0			
	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	21,707,670	21,707,640		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	8,352,917			
	b	Gross sales price for all assets on line 6a 453,694,790				
	7	Capital gain net income (from Part IV, line 2)		8,333,933		
	8	Net short-term capital gain				
	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)	4,405,582	4,351,652			
12	Total. Add lines 1 through 11	34,466,169	34,393,225			
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc.	1,005,527			1,005,527
	14	Other employee salaries and wages	2,146,519			2,146,519
	15	Pension plans, employee benefits	530,602			530,602
	16a	Legal fees (attach schedule)	745,826	0	0	745,826
	b	Accounting fees (attach schedule)				
	c	Other professional fees (attach schedule)				
	17	Interest	928,334	907,678		
	18	Taxes (attach schedule) (see instructions)	1,021,885	698,289		323,596
	19	Depreciation (attach schedule) and depletion	377,193	140,731		
	20	Occupancy	418,559	105,069		313,490
	21	Travel, conferences, and meetings	32,705			32,705
	22	Printing and publications				
	23	Other expenses (attach schedule)	9,519,217	8,354,817		500,587
	24	Total operating and administrative expenses. Add lines 13 through 23	16,726,367	10,206,584	0	5,598,852
	25	Contributions, gifts, grants paid	125,722,675			125,722,675
	26	Total expenses and disbursements. Add lines 24 and 25	142,449,042	10,206,584	0	131,321,527
	27	Subtract line 26 from line 12:				
	a	Excess of revenue over expenses and disbursements	-107,982,873			
	b	Net investment income (if negative, enter -0-)		24,186,641		
	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		29,042,362	2,020,356	2,026,205
	2	Savings and temporary cash investments		286,969,285	272,507,767	272,507,767
	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)		535,128,243	386,525,777	620,919,199
	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)		1,198,625,408	1,259,983,753	1,426,725,164
	14	Land, buildings, and equipment: basis ▶ 18,696,519 Less: accumulated depreciation (attach schedule) ▶ 915,349		18,158,363	17,781,170	17,781,170
15	Other assets (describe ▶ _____)		94,561,482	80,513,499	80,513,499	
16	Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)		2,162,485,143	2,019,332,322	2,420,473,004	
Liabilities	17	Accounts payable and accrued expenses		311,592	325,020	
	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 ▶ _____)		33,602		
	23	Total liabilities (add lines 17 through 22).		345,194	325,020	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ ☐ and complete lines 24, 25, 29 and 30.					
	24	Net assets without donor restrictions				
	25	Net assets with donor restrictions				
	Foundations that do not follow FASB ASC 958, check here ▶ ☒ and complete lines 26 through 30.					
	26	Capital stock, trust principal, or current funds				
	27	Paid-in or capital surplus, or land, bldg., and equipment fund				
	28	Retained earnings, accumulated income, endowment, or other funds		2,162,139,949	2,019,007,301	
	29	Total net assets or fund balances (see instructions)		2,162,139,949	2,019,007,301	
30	Total liabilities and net assets/fund balances (see instructions) .		2,162,485,143	2,019,332,321		

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	2,162,139,949
2	Enter amount from Part I, line 27a	2	-107,982,873
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3	4	2,054,157,076
5	Decreases not included in line 2 (itemize) ▶ _____	5	35,149,775
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29.	6	2,019,007,301

Part VII

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	336,194
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	
3	Add lines 1 and 2.	3	336,194
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-.	5	336,194
6	Credits/Payments:		
a	2020 estimated tax payments and 2019 overpayment credited to 2020	6a	2,602,923
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	2,602,923
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid .	10	2,266,729
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
		1a		No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition). <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>			No
		1b		No
c	Did the foundation file Form 1120-POL for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. (2) On foundation managers.			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers.			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes.</i>	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	Yes	
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b	Yes	
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) DC, PA			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation.</i>	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2020 or the taxable year beginning in 2020? See the instructions for Part XIV. <i>If "Yes," complete Part XIV</i>	9		No
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	10		No

Part VII-A

Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ►WYSSFOUNDATION.ORG	13	Yes	
14	The books are in care of ►MOLLY MCUSIC Telephone no. ►(202) 232-4418 Located at ►1759 R STREET NW WASHINGTON DC ZIP+4 ►20009			
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? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign	16	Yes	No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ 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 Organizations relying on a current notice regarding disaster assistance check here. ► ☐	1b		No
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		No
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)

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

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?

☐ Yes ☒ 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?

☐ Yes ☒ No

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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

Yes

No

5b

6b

7b

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
HANSJOERG WYSS 1759 R STREET NW WASHINGTON, DC 20009	CHAIRMAN 8.0	0	0	0
JOSEPH FISHER 1759 R STREET NW WASHINGTON, DC 20009	TREASURER 8.0	0	0	0
MOLLY MCUSIC 1759 R STREET NW WASHINGTON, DC 20009	PRESIDENT & DIRECTOR 40.0	503,600	62,079	0
MARY KILLINGSWORTH 679 EAST 2ND AVENUE UNIT 3 DURANGO, CO 81301	VICE PRESIDENT 40.0	341,700	35,043	0
PATRICIA KOHL DAVIS 1759 R STREET NW WASHINGTON, DC 20009	SECRETARY / CFO 40.0	160,227	29,153	0
ROBERT BLAND 1759 R STREET NW WASHINGTON, DC 20009	DIRECTOR 2.0	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
ELANOR STARMER 1759 R STREET NW WASHINGTON,DC 20009	PROGRAM OFFICER 40.0	160,680	12,051	0
HEATH NERO 1759 R STREET NW WASHINGTON,DC 20009	PROGRAM OFFICER 40.0	161,000	25,719	0
MATT HOLLAMBY 1759 R STREET NW WASHINGTON,DC 20009	PROGRAM OFFICER 40.0	178,602	27,843	0
ANGELA HOOTON 1759 R STREET NW WASHINGTON,DC 20009	PROGRAM OFFICER 40.0	181,573	38,314	0
I SCOTT MESSINGER 1759 R STREET NW WASHINGTON,DC 20009	VP & GENERAL COUNSEL 40.0	265,200	53,286	0

Total number of other employees paid over \$50,000.

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Form 990-PF (2020)

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
CTF GLOBAL LLC	COMMUNICATIONS	165,000
1401 NEW YORK AVENUE NW WASHINGTON, DC 20005		
REED SMITH LLP	LEGAL SERVICES	62,233
1717 ARCH STREET PHILADELPHIA, PA 19103		

Total number of others receiving over \$50,000 for professional services.

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	1,931,180,259
b	Average of monthly cash balances.	1b	7,979,417
c	Fair market value of all other assets (see instructions).	1c	181,704,164
d	Total (add lines 1a, b, and c).	1d	2,120,863,840
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d.	3	2,120,863,840
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	31,812,958
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,089,050,882
6	Minimum investment return. Enter 5% of line 5.	6	104,452,544

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	104,452,544
2a	Tax on investment income for 2020 from Part VI, line 5.	2a	336,194
b	Income tax for 2020. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b.	2c	336,194
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	104,116,350
4	Recoveries of amounts treated as qualifying distributions.	4	15,007,041
5	Add lines 3 and 4.	5	119,123,391
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	119,123,391

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	131,321,527
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	131,321,527
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	131,321,527
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				119,123,391
2 Undistributed income, if any, as of the end of 2020:				
a Enter amount for 2019 only.			49,600,513	
b Total for prior years: 2018, 2017, 2016				
3 Excess distributions carryover, if any, to 2020:				
a From 2015.				
b From 2016.				
c From 2017.				
d From 2018.				
e From 2019.				0
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2020 from Part XII, line 4: ► \$ 131,321,527				
a Applied to 2019, but not more than line 2a			49,600,513	
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2020 distributable amount				81,721,014
e Remaining amount distributed out of corpus	0			
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:	0			
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
b Prior years' undistributed income. Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b. Taxable amount—see instructions.				
e Undistributed income for 2019. Subtract line 4a from line 2a. Taxable amount—see instructions.				
f Undistributed income for 2021. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020				37,402,377
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).				
8 Excess distributions carryover from 2015 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2021. Subtract lines 7 and 8 from line 6a	0			
10 Analysis of line 9:				
a Excess from 2016				
b Excess from 2017				
c Excess from 2018.				
d Excess from 2019				
e Excess from 2020	0			

Part XIV

a 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)

a 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

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.)**

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).)

HANSJOERG WYSS

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.

N A

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	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 ATTACHED SCHEDULE 1759 R STREET NW WASHINGTON,DC 20009		P C	CHARITABLE CONTRIBUTION	125,722,675
Total ▶ 3a				125,722,675
b <i>Approved for future payment</i>				
Total ▶ 3b				

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		901101	30	14	21,707,640	
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.		901101	89,927	18	4,315,655	
8 Gain or (loss) from sales of assets other than inventory		901101	18,984	18	8,333,933	
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).			108,941		34,357,228	
13 Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calculations.)				13		34,466,169

[illegible]

Part XVII

Yes

1a(1)

1a(2)

1b(1)

1b(2)

1b(3)

1b(4)

1b(5)

1b(6)

1c	Yes
-----------	------------

et value

[illegible]☒ Yes ☐ No

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
BERGER ACTION FUND	IRC 501(C)(4)	COMMON DIRECTORS & OFFICERS

2021-11-03

Date

Title

May the IRS discuss this return with the preparer shown below
(see instr.) ☒ Yes ☐ No

Paid Preparer Use Only	Print/Type preparer's name KIMBERLY BIER	Preparer's Signature	Date	Check if self-employed ☐	PTIN P01697519
	Firm's name ► PRICEWATERHOUSECOOPERS LLP				Firm's EIN ►
	Firm's address ► 2001 MARKET STREET SUITE 1800 PHILADELPHIA, PA 19103				Phone no. (267) 330-3000

Additional Data

[Return to Form](#)

Software ID:

Software Version:

Form 990PF - Special Condition Description:

Special Condition Description

TY 2020 IRS 990 e-File Render

Name: WYSS FOUNDATION

EIN: 25-1823874

Contractor	Explanation
CTF GLOBAL LLC	COMMUNICATIONS CONSULTING SERVICES
REED SMITH LLP	PROFESSIONAL AND LEGAL CONSULTING

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

TY 2020 IRS 990 e-File Render

Name: WYSS FOUNDATION

EIN: 25-1823874

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
LAND	2017-11-08	5,000,000		L					
OFFICE BUILDING	2018-08-01	11,747,892	414,348	M39		301,216			
BUILDING IMPROVEME	2018-08-01	1,290,526	45,517	M39		33,089			
OFFICE EQUIPMENT	2018-08-01	156,375	72,386	M5		30,024			
BUILDING IMPROVEME	2019-07-01	501,726	5,905	M39		12,864			

TY 2020 IRS 990 e-File Render

Name: WYSS FOUNDATION

EIN: 25-1823874

Name of Stock	End of Year Book Value	End of Year Fair Market Value
NORTHERN TRUST	126,601,956	156,530,105
MORGAN STANLEY	259,923,821	464,389,094

TY 2020 IRS 990 e-File Render**Name:** WYSS FOUNDATION**EIN:** 25-1823874

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
BAUPOST VALUE PARTNERS L.P.		226,634,919	239,310,801
CAMPUS BIOTECH		84,525,339	117,867,962
CAPULA FUND		64,587,486	64,563,372
CAXTON FUND		60,000,000	96,691,480
NORTHERN TRUST - WINDHAVEN		64,316,077	68,023,375
RENAISSANCE INSTITUTIONAL		70,884,418	102,532,811
TUDOR GLOBAL FUND		42,725,415	66,375,328
WINTON FUND		0	0
OTHER INVESTMENT FUNDS		414,914,950	453,185,981
INVESTMENTS IN SUBSIDIARIES		73,850	73,850
MOORE INVESTMENT FUNDS		0	0
MORGAN STANLEY		231,321,299	218,100,204

TY 2020 IRS 990 e-File Render

Name: WYSS FOUNDATION

EIN: 25-1823874

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
LAND	5,000,000		5,000,000	
OFFICE BUILDING	11,747,892	715,564	11,032,328	
BUILDING IMPROVEME	1,290,526	78,606	1,211,920	
OFFICE EQUIPMENT	156,375	102,410	53,965	
BUILDING IMPROVEME	501,726	18,769	482,957	

TY 2020 IRS 990 e-File Render

Name: WYSS FOUNDATION
EIN: 25-1823874

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PROFESSIONAL FEES	745,826			745,826

TY 2020 IRS 990 e-File Render

Name: WYSS FOUNDATION

EIN: 25-1823874

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
SECURITY DEPOSIT ON RENTAL	6,000	6,000	6,000
PROGRAM RELATED INVESTMENTS	94,531,021	80,507,499	80,507,499
OTHER RECEIVABLES	24,461		

TY 2020 IRS 990 e-File Render

Name: WYSS FOUNDATION

EIN: 25-1823874

Description	Amount
OTHER DECREASES	35,149,775

TY 2020 IRS 990 e-File Render

Name: WYSS FOUNDATION

EIN: 25-1823874

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PORTFOLIO DEDUCTIONS	8,082,060	8,079,981		
INSURANCE EXPENSE	96,081			96,081
UTILITIES	39,812			39,812
OFFICE EXPENSES	97,516			97,516
NON-DEDUCTIBLE EXPENSES	245,020			
PASS-THROUGH DEPLETION EXPENSE	149,682	87,032		
IRC SECTION 59(E)(2) EXPENSES	354,064			
CONSULTING SERVICES	454,982	187,804		267,178

TY 2020 IRS 990 e-File Render

Name: WYSS FOUNDATION

EIN: 25-1823874

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
CAPULA GLOBAL FUND	3,718,880	3,718,880	
BAUPOST VALUE PARTNERS I LP	49,556	32,588	
BAUPOST VALUE PARTNERS III LP	220,815	147,856	
OTHER INCOME	-24,938	-24,938	
FINEPOINT CAPITAL	136,795	136,123	
NON-TAXABLE INCOME	133,193		
RIEF STRATEGIC PARTNERS LP	52,804	52,804	
RENTAL INCOME	118,477	118,477	
GILTI INCOME FROM FORM 8992		180,400	
PREVIOUSLY TAXED GILTI E&P		-10,538	

TY 2020 IRS 990 e-File Render

Name: WYSS FOUNDATION

EIN: 25-1823874

Description	Beginning of Year - Book Value	End of Year - Book Value
PENSION LIABILITY AND PAYROLL	33,602	

TY 2020 IRS 990 e-File Render

Name: WYSS FOUNDATION

EIN: 25-1823874

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PAYROLL TAXES	200,858			200,858
STATE & LOCAL TAXES	9,246	9,246		
FOREIGN TAXES	615,996	615,996		
REAL ESTATE TAXES	195,785	73,047		122,738