Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation

▶ Do not enter social security numbers on this form as it may be made public.
▶ Go to www.irs.gov/Form990PF for instructions and the latest information.

OMB No. 1545-0052

2020

Open to Public Inspection

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

Name of foundation
The Lynde and Harry Bradley Foundation Inc

A Employer identification number
39-6037928

Number and street (or P.O. box number if mail is not delivered to street address)
1400 North Water Street Suite 300

Room/suite

B Telephone number (see instructions)
(414) 291-9915

City or town, state or province, country, and ZIP or foreign postal code
Milwaukee, WI 532022506

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)* ▶$ 1,061,478,184

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).)*

			(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	0	0	0	
	4	Dividends and interest from securities	7,866,177	13,305,137	0	
	5a	Gross rents	0	0	0	
	b	Net rental income or (loss) 0				
	6a	Net gain or (loss) from sale of assets not on line 10	74,818,165			
	b	Gross sales price for all assets on line 6a 261,641,590				
	7	Capital gain net income (from Part IV, line 2)		69,345,707		
	8	Net short-term capital gain				
	9	Income modifications			0	
	10a	Gross sales less returns and allowances 0				
	b	Less: Cost of goods sold 0				
	c	Gross profit or (loss) (attach schedule)	0		0	
	11	Other income (attach schedule)	183,404	51,235	0	
	12	**Total.** Add lines 1 through 11	82,867,746	82,702,079	0	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc.	1,834,751	139,546	0	1,681,959
	14	Other employee salaries and wages	1,247,005	9,746	0	1,237,259
	15	Pension plans, employee benefits	958,869	41,323	0	918,397
	16a	Legal fees (attach schedule)	97,919	0	0	81,503
	b	Accounting fees (attach schedule)	192,806	141,041	0	33,641
	c	Other professional fees (attach schedule)	4,346,882	2,792,830	0	441,893
	17	Interest	0	0	0	0
	18	Taxes (attach schedule) (see instructions)	1,205,375	169,922	0	0
	19	Depreciation (attach schedule) and depletion	183,595	0	0	
	20	Occupancy	439,132	0	0	368,165
	21	Travel, conferences, and meetings	104,093	0	0	103,018
	22	Printing and publications	11,013	0	0	11,013
	23	Other expenses (attach schedule)	891,631	5,309,317	0	1,051,679
	24	**Total operating and administrative expenses.** Add lines 13 through 23	11,513,071	8,603,725	0	5,928,527
	25	Contributions, gifts, grants paid	49,016,699			51,354,460
	26	**Total expenses and disbursements.** Add lines 24 and 25	60,529,770	8,603,725	0	57,282,987
	27	Subtract line 26 from line 12:				
	a	**Excess of revenue over expenses and disbursements**	22,337,976			
	b	**Net investment income** (if negative, enter -0-)		74,098,354		
	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	45,740,077	35,704,811	35,704,811
	2	Savings and temporary cash investments	0	0	0
	3	Accounts receivable ▶ 7,463,427			
		Less: allowance for doubtful accounts ▶	4,325,225	7,463,427	7,463,427
	4	Pledges receivable ▶			
		Less: allowance for doubtful accounts ▶ 0	15,000	0	0
	5	Grants receivable	0	0	0
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)	0	0	0
	7	Other notes and loans receivable (attach schedule) ▶ 0			
		Less: allowance for doubtful accounts ▶ 0	0	0	0
	8	Inventories for sale or use	0	0	0
	9	Prepaid expenses and deferred charges	0	0	0
	10a	Investments—U.S. and state government obligations (attach schedule)	0	0	0
	b	Investments—corporate stock (attach schedule)	219,692,853	247,794,532	247,794,532
	c	Investments—corporate bonds (attach schedule)	0		0
	11	Investments—land, buildings, and equipment: basis ▶ 0			
		Less: accumulated depreciation (attach schedule) ▶ 0	0		0
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	662,808,831	768,775,633	768,775,633
	14	Land, buildings, and equipment: basis ▶ 1,929,046			
		Less: accumulated depreciation (attach schedule) ▶ 220,256	1,782,866	1,708,790	1,708,790
	15	Other assets (describe ▶)	46,134	30,991	30,991
	16	**Total assets** (to be completed by all filers—see the instructions. Also, see page 1, item I)	934,410,986	1,061,478,184	1,061,478,184
Liabilities	17	Accounts payable and accrued expenses	1,673,996	1,789,000	
	18	Grants payable	9,989,650	9,197,500	
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons	0	0	
	21	Mortgages and other notes payable (attach schedule)	0	0	
	22	Other liabilities (describe ▶)	4,047,506	5,797,210	
	23	**Total liabilities**(add lines 17 through 22)	15,711,152	16,783,710	
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	793,367,185	908,325,599	
	25	Net assets with donor restrictions	125,332,649	136,368,875	
		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			
	29	**Total net assets or fund balances** (see instructions)	918,699,834	1,044,694,474	
	30	**Total liabilities and net assets/fund balances** (see instructions)	934,410,986	1,061,478,184	

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	918,699,834
2	Enter amount from Part I, line 27a	2	22,337,976
3	Other increases not included in line 2 (itemize) ▶	3	103,656,664
4	Add lines 1, 2, and 3	4	1,044,694,474
5	Decreases not included in line 2 (itemize) ▶	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29	6	1,044,694,474

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	1,029,967
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	
3	Add lines 1 and 2	3	1,029,967
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	1,029,967
6	Credits/Payments:		
a	2020 estimated tax payments and 2019 overpayment credited to 2020 — 6a: 1,027,121		
b	Exempt foreign organizations—tax withheld at source — 6b:		
c	Tax paid with application for extension of time to file (Form 8868) — 6c: 550,000		
d	Backup withholding erroneously withheld — 6d: 0		
7	Total credits and payments. Add lines 6a through 6d	7	1,577,121
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	547,154
11	Enter the amount of line 10 to be: **Credited to 2021 estimated tax** ▶ 547,154 **Refunded** ▶	11	0

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	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? *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) ▶ WI			
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	Yes	
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	

Website address ▶ www.bradleyfdn.org

14 The books are in care of ▶ Stephen A Langlois Telephone no. ▶ (414) 291-9915

Located at ▶ 1400 N WATER ST 300 MILWAUKEE WI ZIP+4 ▶ 532022506

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

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	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		No
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**		No
	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
Terri L Famer 1400 North Water Street Milwaukee, WI 532022506	Assistant Secretary 40.000	115,069	36,987	772
Carl O Helstrom 1400 North Water Street Milwaukee, WI 532022506	Vice President for Programs 45.000	283,530	63,076	1,149
Kim Magnan 1400 North Water Street Milwaukee, WI 532022506	Director for Human Resources & Administrative Services 45.000	92,625	13,884	610
Stephen A Langlois 1400 North Water Street Milwaukee, WI 532022506	Vice President for Finance, Technology and Operations 45.000	257,802	60,580	1,149
Mark Rhode 1400 North Water Street Milwaukee, WI 532022506	Director of Finance 45.000	164,404	46,187	1,066
T Considine 1400 North Water Street Milwaukee, WI 532022506	Director 2.000	0	0	0
C Culver 1400 North Water Street Milwaukee, WI 532022506	Director 2.000	37,000	0	0
P English 1400 North Water Street Milwaukee, WI 532022506	Vice Chairman & Director 2.000	0	0	0
R George 1400 North Water Street Milwaukee, WI 532022506	Director 2.000	30,000	0	0
V Hanson 1400 North Water Street Milwaukee, WI 532022506	Director 2.000	33,000	0	0
C Mitchell 1400 North Water Street Milwaukee, WI 532022506	Secretary & Director 2.000	0	0	0
J A Pope 1400 North Water Street Milwaukee, WI 532022506	Chairman & Director 2.000	0	0	0
J Barry 1400 North Water Street Milwaukee, WI 532022506	Director 2.000	38,000	0	0
R Ribble 1400 North Water Street Milwaukee, WI 532022506	Director 2.000	35,000	0	0
Richard W Graber (See Statement) 1400 North Water Street Milwaukee, WI 532022506	President 50.000	732,917	73,990	1,149

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
Alicia Manning 1400 North Water Street Milwaukee, WI 532022506	Sr Program Officer 40.000	156,906	43,829	1,031
Ingrid Gregg 1400 North Water Street Milwaukee, WI 532022506	Sr Program Officer 40.000	231,517	55,451	1,149
Jason S Crye 1400 North Water Street Milwaukee, WI 532022506	Program Officer 40.000	110,583	36,906	759
Dionne King 1400 North Water Street Milwaukee, WI 532022506	Dir of Operations 40.000	108,815	37,302	685
Renee Krebs 1400 North Water Street Milwaukee, WI 532022506	IT Manager 40.000	80,367	27,256	555
Total number of other employees paid over $50,000 ▶				10

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
Cambridge Associates PO Box 412015 BOSTON,MA 02241	Investment Consulting	502,117
Artisan Partners Limited Partnership 875 E Wisconsin Ave Suite 800 MILWAUKEE,WI 53202	Investment Management	424,263
PRISA II 7 Giralda Farms Floor 3 MADISON,NJ 07940	Investment Management	365,055
Fiduciary Management 100 E Wisconsin Avenue Suite 2200 MILWAUKEE,WI 53202	Investment Management	360,895
Invesco Emerging Markets 1555 Peachtree Street NE Suite 1800 Atlanta,GA 30309	Investment Management	269,057

Total number of others receiving over $50,000 for professional services. . . . . ▶ 27

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 The Bradley Summit - Panel discussions among prominent commentators and scholars on "Challenges and Opportunities for a New Fusionism." The summit provided an opportunity for a small group of like-minded donors to come together with a select group of scholars, think-tank representatives and opinion leaders to explore ways in which conservatives, classical liberals and libertarians can work together more effectively in the future. With all that is happening in the movement for freedom and free enterprise, a small group discussion among committed investors and practitioners was timely and important.	102,626
2	
3	
4	

Part IX-B **Summary of Program-Related Investments** (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1	
2	
All other program-related investments. See instructions. **3**	
Total. Add lines 1 through 3 . . . . . ▶	0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:				
a	Average monthly fair market value of securities			1a	419,797,431
b	Average of monthly cash balances			1b	34,836,246
c	Fair market value of all other assets (see instructions)			1c	453,232,997
d	**Total** (add lines 1a, b, and c)			1d	907,866,674
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	907,866,674
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)			4	13,618,000
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4			5	894,248,674
6	**Minimum investment return.** Enter 5% of line 5			6	44,712,434

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	44,712,434
2a	Tax on investment income for 2020 from Part VI, line 5	2a	1,029,967		
b	Income tax for 2020. (This does not include the tax from Part VI.)	2b			
c	Add lines 2a and 2b			2c	1,029,967
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	43,682,467
4	Recoveries of amounts treated as qualifying distributions			4	1,212,561
5	Add lines 3 and 4			5	44,895,028
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	44,895,028

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	57,282,987
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	94,375
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	57,377,362
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	
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	57,377,362

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				44,895,028
2 Undistributed income, if any, as of the end of 2020:				
a Enter amount for 2019 only.			0	
b Total for prior years: 2018 , 2017 , 2016		0		
3 Excess distributions carryover, if any, to 2020:				
a From 2015. 6,671,688				
b From 2016. 4,638,505				
c From 2017. 12,331,395				
d From 2018. 4,429,423				
e From 2019. 0				
f **Total** of lines 3a through e.	28,071,011			
4 Qualifying distributions for 2020 from Part XII, line 4: ▶ $ 57,377,362				
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				44,895,028
e Remaining amount distributed out of corpus	12,482,334			
5 Excess distributions carryover applied to 2020. *(If an amount appears in column (d), the same amount must be shown in column (a).)*				0
6 **Enter the net total of each column as indicated below:**				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	40,553,345			
b Prior years' undistributed income. Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b. Taxable amount —see instructions		0		
e Undistributed income for 2019. Subtract line 4a from line 2a. Taxable amount—see instructions			0	
f Undistributed income for 2021. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0			
8 Excess distributions carryover from 2015 not applied on line 5 or line 7 (see instructions) . . .	6,671,688			
9 **Excess distributions carryover to 2021.** Subtract lines 7 and 8 from line 6a	33,881,657			
10 Analysis of line 9:				
a Excess from 2016 4,638,505				
b Excess from 2017 12,331,395				
c Excess from 2018. . . . 4,429,423				
d Excess from 2019 0				
e Excess from 2020 12,482,334				

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).)

NONE

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

NONE

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

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

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

PROGRAM TEAM
1400 N WATER ST SUITE 300
MILWAUKEE,WI 53202
(414) 291-9915

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

PROPOSAL, BUDGETS AND AMOUNT OF GRANT BEING REQUESTED, IRS DETERMINATION LETTER UNDER SECTION 501(C)(3), SEE WWW.BRADLEYFDN.ORG

c Any submission deadlines:

LETTERS OF INQUIRY AND PROPOSALS ARE ACCEPTED ON AN ONGOING BASIS. SEE WWW.BRADLEYFDN.ORG

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

THE FOUNDATION NORMALLY AWARDS GRANTS ONLY TO ORGANIZATIONS QUALIFIED UNDER 509(A)(1), (2), (3) AND SECTION 501(C)(3) OF THE INTERNAL REVENUE CODE.

Unclaimed Dividends as on 31st Aug, 2022

Company Name : Tata Consultancy Services Limited

Name	Address	Amount	Date of Declaration
ABDUL GANI	[illegible]	1.00	15-Jun-2011

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	7,866,177	
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	74,818,165	
9 Net income or (loss) from special events:					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a Other Income			1	183,404	
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)		0		82,867,746	0
13 **Total.** Add line 12, columns (b), (d), and (e)				**13**	82,867,746

(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: 2021-11-13 — 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
Rachel J Becker		2021-11-12		P00966076
Firm's name ▶ Deloitte Tax LLP				Firm's EIN ▶86-1065772
Firm's address ▶ 555 E Wells Suite 1400 Milwaukee, WI 53202				Phone no. (414) 271-3000

Additional Data

Return to Form

Software ID: 20011424
Software Version: 2020v4.0

Form 990PF - Special Condition Description:

Special Condition Description

TY 2020 IRS 990 e-File Render

Name: The Lynde and Harry Bradley Foundation Inc

EIN: 39-6037928

Software ID: 20011424

Software Version: 2020v4.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
DELOITTE LLP	55,500	36,075		19,425
Quandt Berndt & Company, LLC	137,306	104,966		14,216

TY 2020 IRS 990 e-File Render

Name: The Lynde and Harry Bradley Foundation Inc

EIN: 39-6037928

Software ID: 20011424

Software Version: 2020v4.0

Person Name	Explanation
Richard W Graber (See Statement)	2020 Compensation includes retirement compensation previously reported on a separate line ($150,000) on Form 990-PF, Part VIII.

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: The Lynde and Harry Bradley Foundation Inc

EIN: 39-6037928

Software ID: 20011424

Software Version: 2020v4.0

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
Depreciation		1,708,790		Straight Line	0	183,595			
Amortization of Software		100,960		Straight Line	5.0				

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: The Lynde and Harry Bradley Foundation Inc

EIN: 39-6037928

Software ID: 20011424

Software Version: 2020v4.0

Grantee's Name	Grantee's Address	Grant Date	Grant Amount	Grant Purpose	Amount Expended By Grantee	Any Diversion By Grantee?	Dates of Reports By Grantee	Date of Verification	Results of Verification
Encounter for Culture and Education Inc	900 Broadway Suite 601 New York, NY 100031239	2019-08-14	1,000,000	To support Encounter Books for 2020	1,000,000	No	8/31/2021	2021-08-31	Report states all funds were expended.
Encounter for Culture and Education Inc	900 Broadway Suite 601 New York, NY 100031239	2019-08-21	50,000	To support the Kirkpatrick Awards	0		9/18/2021	2021-08-31	Awards were put on hold due to COVID. Event is to be rescheduled. Funds will be used for stated purpose.

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: The Lynde and Harry Bradley Foundation Inc

EIN: 39-6037928

Software ID: 20011424

Software Version: 2020v4.0

Name	Date Acquired	How Acquired	Date Sold	Purchaser Name	Gross Sales Price	Basis	Basis Method	Sales Expenses	Total (net)	Accumulated Depreciation
Book Gain					74,818,165				74,818,165	

ETF 2020 IRS 990 e-File Render

Name: The Lynde and Harry Bradley Foundation Inc
EIN: 390714350
Software ID: 2001424
Software Version: 2020v4

Name of Stock	End of Year Book Value
ABB LTD	3,135,941
ACADIA HEALTHCARE CO INC	215,102
ACCENTURE PLC	1,684,800
ACTIVISION BLIZZARD INC	1,080,495
ADOBE SYSTEMS INCORPORATED	218,976
ADOBE HOMECARE CORP	171,290
ADOBE INC	0
AETHLON GLOBAL EDUCATION INC	0
AETNA INC	138,531
AFLAC INC	985,955
AGI THERAPEUT SERVICES GROUP I	1,081,083
ALBEMARLE CORP	531,072
ALEXION PHARMACEUTICALS INC	0
ALIBABA GROUP HOLDING LTD	0
ALLER TECHNOLOGIES INC	0
ALLEGHENY TECHNOLOGIES INC	0
ALLETE INC	0
ALLSCRIPTS HEALTHCARE SOLUTION	0
ALPHABET INC CAPITAL STOCK	1,068,560
ALTRIA INDUSTRIAL MOTION CORP	265,510
AMAZON COM INC	4,966,818
AMC NETWORKS INC	883,237
AMERISOURCE BERGEN	0
AMERICAN EAGLE OUTFITTERS INC	255,162
AMERICAN INGODMANT CORP	105,210
AMICUS THERAPEUTICS INC	348,428
AMN HEALTHCARE SERVICES INC	255,037
AMPHASTAR PHARMACEUTICALS INC	115,637
ARRAYS NETWORKS INC	0
ARCH CAPITAL GROUP LTD	2,607,176
ARENA PHARMACEUTICALS INC	151,270
ARGO GROUP INTERNATIONAL HOLDI	138,354
ARGOS THERAPEUTICS INC	0
ATHEGRAF INC	228,247
AVALARA INC	1,002,080
AVAYA HOLDINGS CORP	223,480
AVIGEN INC	105,210
AVIS BUDGET GROUP INC	913,600
BAIDU INC	2,183,570
BALL CORP	571,659
BANK OF AMERICA	837,204
BERKSHIRE HATHAWAY INC	5,581,111
BESTSENTIMENT INC	0
BETS NETWORKS INC	196,532
BIO RAD LABORATORIES INC	1,199,180
BITS WHOLESALE CLUB HOLDINGS I	0
BLACK HILLS CORP	112,884
BLOOMIN' BRANDS INC	171,671
BLUE SPHERE INC	0
BLUEPRINT MEDICINES CORP	0
BOEING HOLDINGS INC	3,418,859
BOTTOMLINE TECHNOLOGIES DE INC	249,588
BOX INC	231,180
BRIGHTSPHERE INVESTMENT GROUP	125,706
BRISTOL MYERS SQUIBB CO	0
BROADCOM PROPERTY CORP INC	189,497
BWX CORPORATION INC	1,153,164
CADENCE BANCORP	1,100,140
CADIANS ENTERTAINMENT CORP	0
CALLAWAY GOLF CO	0
CAMDEN GROVE HOLDINGS INC	0
CARETRONICS PLC	0
CARSTEN SPIRIT INC	771,374
CATHAY GENERAL BANCORP	0
CENTENNIAL BANK CORP	0
CENNER CORP	0
CHANDLAUCKER CORP	139,953
CHARLES SCHWAB CORPTHE	3,127,769
CHEGG INC	1,439,617
CHILDREN'S PLACE INC/THE	0
CHUBB LTD	3,266,182
CIE FINANCIERE RICHEMONT SA	2,512,516
CINEMARK HOLDINGS INC	443,548
CISCO SYSTEMS INC	284,412
CM INDUSTRIAL INC	687,268
COMCAST CORP	4,233,501
CONTINENTAL RESOURCES INC	1,151,165
CORNWALLT SYSTEMS INC	194,349
CORNING GROUP PLC	3,373,620
CORPAIS MORENALS INTERNATIONAL	697,436
COSMOS GROUP HOLDINGS INC	2,018,200
CORNERSTONE ONDEMAND INC	0
COSTCO WHOLESALE CORP	1,673,657
COUPA SOFTWARE INC	1,627,785
CVS INC	1,376,250
CYBERARK SOFTWARE LTD	215,354
DANAHER CORP	687,908
DANONE SA	988,315
DAVITA BEATH'S ENTERTAINMENT	122,782
DECKERS OUTDOOR CORP	321,194
DELTA AIR LINES INC	112,810
DIAMONDROCK HOSPITALITY CO	208,972
DNB BANKEN GLOBAL INC	0
DOLLAR GENERAL CORP	3,853,747
DOLLAR TREE INC	1,738,198
DSV PANALPINA A/S	1,201,123
DUKE ENERGY CORP	1,025,861
ECOLAB INC	1,525,987
EDGEWELL PERSONAL CARE CO	0
EDWARDS LIFESCIENCES CORP	0
EMCOR GROUP INC	108,563
EMERSON ELECTRIC CO	1,122,367
ENERGY TRANSFER LP	0
ENERGYS	159,890
ENERGYSOLUTIONS INC	108,563
ENTEGRIS INC	86,490
ENTERPRISE FINANCIAL SERVICES	148,188
EXPEDION THERAPEUTICS INC	208,972
EXXON MOBIL CORP	0
EVERBRIDGE INC	228,077
EVOQUA WATER TECHNOLOGIES CORP	281,750
EXACT SCIENCES CORP	0
EXPEDITORS INTERNATIONAL OF WA	1,681,735
FACEBOOK INC	3,125,246
FABRITECH LTD	1,139,003
FIBROGEN INC	174,694
FIDELITY NATIONAL INC	1,116,168
FIRST HORIZON CORP	181,166
FIRST INDUSTRIAL REALTY TRUST	126,150
FIRST MIDWEST BANCOP INC/IL	0
FLIR SYSTEMS INC	837,153
FRESENIUS MEDICAL CARE AG & CO	1,962,819
FRONTDOOR INC	173,727
FTI CONSULTING INC	145,236
GARMIN LTD ORDSHARES	0
G III APPAREL GROUP LTD	0
GILD MOBILE INC	200,923
GRIFFON INTERNATIONAL LTD	164,670
GRAPHIC PACKAGING HOLDING CO	916,842
GREENSKY INC	318,003
GROUPE BRUXELLES LAMBERT SA	1,869,296
GUIDEWIRE SOFT INC	1,068,109
HANCOCK WHITNEY INC	404,906
HANDSBRANDS INC	781,089
HARSCO CORP	161,281
HDFC BANK LTD ADR	0
HESCO CORP	1,542,968
HELLA GMBH & CO KGAA	0
HELLN ENERGY SOLUTIONS GROUP I	0
HELLA GMBH & CO KGAA	679,232
HENGAN INTERNATIONAL GROUP CO	261,973
HERC HOLDINGS INC	173,150
HERCH THERAPEUTICS INC	275,992
HERE BANCSHARES INC	208,972
HONEYWELL INTERNATIONAL INC	2,990,349
HORIZO MAIN EQUITY CORP	0
HORIZON THERAPEUTICS PLC	234,980
HOSTESS BRANDS INC	86,708
HKBC BANK PLC#6.375 PERP	1,128,484
HRUBEAU RESTOR CO	0
HSC/INTERACTIVECORP	1,535,439
IBERDRAMA CORP	0
ICF INTERNATIONAL INC	0
IDEXX LABORATORIES INC	0
ILLUMINA INC	0
IMMUNOMEDICS INC	479,532
INFOSYS LTD	0
INTERCONTINENTAL EXCHANGE INC	458,508
INTUIT INC	0
INTUITIVE SURGICAL INC	3,372,208
INVESCO MORTGAGE CAPITAL INC	0
INVESTORS BANCORP INC	145,506
ENVACE RESTHERAPEUTICS INC	271,440
ISHARES RUSSELL 2000 VALUE E	368,600
ISRG INC	0
JBL SERVICE FOODS CORP	0
JD GLOBAL INC	247,136
JOHN DEERE GROUP PLC	0
JPMORGAN CHASE & CO	2,392,371
KAISER ALUMINUM CORP	160,218
KB HOME	170,952
KEYSIGHT INC	1,209,885
KONINKLIJKE PHILIPS NV	3,179,779
KRATON CORP	0
LAMAGNOLIA CO LTD	1,642,448
LEVERSON REALTY TRUST	52,802
LKC GROUP INC	226,119
LIBERTY MEDIA CORP LIBERTY BRA	460,680
LONG GATE ENTERTAINMENT CORP	958,074
LYTHA MOTORS INC	409,236
LYNNDON PLC	178,767
LIVE NATION ENTERTAINMENT INC	0
LIVERT CORP	0
LUMBERMAN HOLDINGS INC	115,219
LUXOTIC BANKING GROUP PLC	1,223,451
LULEBORN ATLETICS	676,355
MAGELLAN HEALTH INC	4,614,613
MAGNOLIA OIL & GAS CORP	1,123,888
MASTEC INC	244,493
MASTERCARD INC	2,685,239
MAXIM TECHNOLOGIES INC	665,639
MCCORMICK & CO INC	316,008
MICHAELS COS INC/THE	246,409
MICROSOFT CORP	2,238,592
MKS INC	0
MOTLAND GENETICS INC	0
MOTLAND STATES AFFILIATES TR	195,891
NATWEST GROUP PLC	604,053
NAVIN CORP	2,409,250
NESTLE SA	1,790,730
NETAPP INC	0
NEW ENTERPRISE EDUCATION & TECHN	0
NEWPORT RESIDENTIAL TRUST INC	175,394
NIKE INC	175,386
NOK INC	0
NORTHERN TRUST CORP	2,363,428
NOVARTIS AG	2,208,617
NUTRIEN LTD	0
NUVASIVE INC	0
NVIDIA CORP	1,133,343
NXP SEMICONDUCTORS NV	2,229,297
OLD NATIONAL BANCORP IN	0
ORINCOR GROUP INC	2,093,137
OPTION CARE HEALTH INC	0
ORTHOFIX MEDICAL INC	0
OSI SYSTEMS INC	0
PACCAR INC	2,363,209
PANDORA HOLDING SA	0
PARSLEY ENERGY INC	184,866
PERCEPTIVE INC	0
PERFORMANCE FOOD GROUP CO	219,006
PERSPECTA INC	936,733
PETTIS INC	180,484
PIEDMONT OFFICE REALTY TRUST I	0
PINNACLE FINANCIAL PARTNERS IN	227,032
PIONEER NATURAL RESOURCES CO	0
PLANET FITNESS INC	0
PLAY GROUP INC	0
POLYCOM INC	115,907
POTLATCHDELTIC CORP	0
PPG INDUSTRIES INC	2,569,279
PPL CORP HOLDINGS INC	814,246
PROGRESSIVE CONTINUE	2,082,412
PROLOGIS INC	176,213
PS BUSINESS PARKS INC	0
PTC THERAPEUTICS INC	202,009
QTS REALTY TRUST INC	173,264
QUALCOMM INC	0
QUEST DIAGNOSTICS INC	3,644,219
QUIDEL CORP	0
RAPIDO GROUP INC	181,238
RECAFT BRACKGROUP CORP PLC	0
REALPLC	1,998,440
REGENERON PHARMACEUTICALS INC	245,788
REINWARD CORP	208,972
REPSOL SA	290,890
RICHEMONTSEC FRIS WTS	14,453
ROGERS CORP	0
RONO INC	0
ROPER TECHNOLOGIES INC	678,536
ROYAL BANK OF SCOTLAND GROUP P	0
ROYAL DUTCH SHELL	77,430
RYBERG PHARMA PLC	1,515,864
SAMSAR HOLDINGS PLC	144,351
SAVARA INDUSTRIALLY PROPERTIES I	0
S&P GLOBAL INC	687,701
SAFRAN SA	910,000
SAP INC	280,240
SALIPORT TECHNOLOGIES HOLDING	0
SALESFORCE COM INC	0
SAMSUNG ELECTRONICS CO LTD	4,905,511
SAMSUNG ELECTRONICS CO LTD	941,437
SANDY SPRING BANCORP INC	152,259
SANOFI SPONSORED ADR	0
SCALLINGBURG LTD	3,500,320
SEACOAST BANKING CORP OF FLORI	224,490
SEAGROVE ENTERTAINMENT INC	122,164
SEC LITTLE INSURANCE CORP	158,743
SERVICENOW INC	1,472,757
SERVE & I HOLDINGS CO LTD	683,391
SHERWIN-WILLIAMS CO/THE	934,270
SHOPIFY INC	1,218,146
SIGEON LABORATORIES INC	212,658
SIMMONS FIRST NATIONAL CORP	0
SINCLAIR BROADCAST GROUP INC	0
SKYWEST INC	136,851
SLEEP NUMBER CORP	0
SMILEDIRECTCLUB INC	152,474
SMITH & NEPHEW PLC	2,296,265
SNAPPLANET INC	845,244
SODEXO SA	1,196,959
SONY CORP	3,591,450
SOUTHWEST AIRLINES CO	0
SOUTHWEST GAS HOLDINGS INC	0
SP PLUS CORP	0
SPLUNK INC	0
SPOTIFY TECHNOLOGY SA	3,251,382
SPRINT CORP	148,144
SPX CORPORCE INC	213,932
SPX CORP	218,765
SQUARE INC	1,337,074
STAR BULK CARRIERS CORP	0
STARLEY BLACK & DECKER INC	0
STEPAN MOODY LTD	133,863
SUNCOR ENERGY INC	1,007,556
SUPERVALU PHARMACEUTICALS INC	0
SYNEOS HEALTH INC	202,346
TAIO PAN INTERACTIVE SOFTWARE	725,187
TEAC THERAPEUTICS INC	193,003
TJ COMMUNITY LTD	0
TELEFONICA BRASIL SA	1,076,101
TENARIS SA	861,434
TESCO PLC	0
TESCO PLC	1,025,260
TEXAS PACIFIC LAND TRUST	147,581
TIMKEN CO/THE	265,586
TIX COS INC/THE	2,838,476
TOKYO ELECTRON LTD	2,278,444
TMSS LD INC	2,274,648
TOTAL SA	3,525,977
TRIO HARBORS INVESTMENT CORP	65,127
TYLER TECHNOLOGIES INC	636,446
UBS GROUP AG	2,558,615
UFP INDUSTRIES INC	169,428
ULTRA CLEAN HOLDINGS INC	182,851
UNITED CONTINENTAL HOLDINGS INC	0
UNITED COMPOUNT BANKS INC/GA	0
UNITEDHEALTH GROUP INC	3,256,064
UNIVERSAL FOREST PRODUCTS INC	0
URBAN OUTFITTING INC	716,800
US CONCRETE INC	0
US ECOLOGY INC	0
VALULINE INC	0
VANDA PHARMACEUTICALS INC	0
VANE ONGOING CORP	812,485
VERA SYSTEMS INC	3,176,885
VERAY SYSTEMS INC	0
VERATEX HOLDINGS INC	224,525
VERIZON COMMUNICATIONS INC	211,747
VERTEXA CORP	0
VGA INC	0
VISANY INTERTECHNOLOGY INC	0
VIVENDI SA	1,056,725
VOYAGE HOLDINGS CORP	208,318
WALT DISNEY CO/THE	0
WEBMER ENTERPRISES INC	0
WEST BEND MUTUAL INSURANCE GROU	50,019
WELLS TOWERS NATION PLC	597,278
WYL ETERNE WORLD WIDE INC	0
WORKDAY INC	1,694,522
WYNN RESORTS LTD	1,092,180
XPO LOGISTICS INC	233,576
YELP INC	0
YPRETS INC	706,189
ZAYO GROUP COMMUNICATIONS INC	1,458,800
ZIMMER BIOMET HOLDINGS INC	0
ZOOM VIDEO COMMUNICATIONS INC	0
ZTO EXPRESS (CAYMAN) INC	0

TY 2020 IRS 990 e-File Render

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EIN: 39-6037928
Software ID: 20011424
Software Version: 2020v4.0

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
BAIRD INTERMEDIATE BD-INSTL	FMV	46,762,978	46,762,978
BAIRD SHORT TERM BOND FD-INS	FMV	63,186,363	63,186,363
BAILLIE GIFFORD - INTL - LC	FMV	78,056,234	78,056,234
BAYCITY SENIOR LOAN FUND LP	FMV	32,356,959	32,356,959
BARINGS INTERNATIONAL SMALL	FMV	17,577,192	17,577,192
CF GLOBAL CORE PLUS US$ HEDGED FUND	FMV	26,014,027	26,014,027
FOUR POINTS MULTI-STRATEGY FUND LP SERIES B	FMV	43,612,251	43,612,251
OFI - EM	FMV	35,122,726	35,122,726
PRISA II LP	FMV	30,866,016	30,866,016
TRUMBULL PROPERTY FUND	FMV	23,260,613	23,260,613
Hedge Fund #10	FMV	24,111	24,111
Hedge Fund #20	FMV	1,072	1,072
Hedge Fund #22	FMV	0	0
Hedge Fund #23	FMV	3,050	3,050
Hedge Fund #26	FMV	13,965	13,965
Hedge Fund #36	FMV	12,707,668	12,707,668
Hedge Fund #37	FMV	3,817,720	3,817,720
Hedge Fund #38	FMV	6,370,435	6,370,435
Hedge Fund #39	FMV	16,241,376	16,241,376
Hedge Fund #40	FMV	19,019,281	19,019,281
Hedge Fund #41	FMV	13,723,890	13,723,890
Hedge Fund #42	FMV	5,771,238	5,771,238
Limited Partnership #1	FMV	3,668,014	3,668,014
Limited Partnership #2	FMV	2,600,912	2,600,912
Limited Partnership #3	FMV	3,144,675	3,144,675
Limited Partnership #4	FMV	3,821,813	3,821,813
Limited Partnership #5	FMV	4,357,463	4,357,463
Limited Partnership #6	FMV	776,336	776,336
Limited Partnership #7	FMV	6,082,383	6,082,383
Limited Partnership #8	FMV	1,811,357	1,811,357
Limited Partnership #9	FMV	236,365	236,365
Limited Partnership #12	FMV	386,351	386,351
Limited Partnership #13	FMV	207,993	207,993
Limited Partnership #14	FMV	614,949	614,949
Limited Partnership #15	FMV	164,357	164,357
Limited Partnership #16	FMV	592,865	592,865
Limited Partnership #17	FMV	257,713	257,713
Limited Partnership #18	FMV	115,437	115,437
Limited Partnership #19	FMV	2,563,298	2,563,298
Limited Partnership #20	FMV	647,103	647,103
Limited Partnership #21	FMV	19,764,917	19,764,917
Limited Partnership #22	FMV	1,165,281	1,165,281
Limited Partnership #23	FMV	879,971	879,971
Limited Partnership #24	FMV	521,145	521,145
Limited Partnership #25	FMV	14,171	14,171
Limited Partnership #26	FMV	734,718	734,718
Limited Partnership #27	FMV	163,537	163,537
Limited Partnership #28	FMV	1,665,445	1,665,445
Limited Partnership #29	FMV	98,590	98,590
Limited Partnership #31	FMV	166,513	166,513
Limited Partnership #32	FMV	1,022,058	1,022,058
Limited Partnership #33	FMV	13,664,415	13,664,415
Limited Partnership #34	FMV	14,950,890	14,950,890
Limited Partnership #35	FMV	948,803	948,803
Limited Partnership #36	FMV	143,113	143,113
Limited Partnership #37	FMV	1,294,106	1,294,106
Limited Partnership #38	FMV	6,692,743	6,692,743
Limited Partnership #39	FMV	765,939	765,939
Limited Partnership #40	FMV	1,240,594	1,240,594
Limited Partnership #41	FMV	0	0
Limited Partnership #42	FMV	72,661	72,661
Limited Partnership #43	FMV	4,860,281	4,860,281
Limited Partnership #44	FMV	3,540,409	3,540,409
Limited Partnership #45	FMV	455,685	455,685
Limited Partnership #46	FMV	849,629	849,629
Limited Partnership #47	FMV	1,002,642	1,002,642
Limited Partnership #48	FMV	117,089	117,089
Limited Partnership #49	FMV	9,861,199	9,861,199
Limited Partnership #50	FMV	3,288,906	3,288,906
Limited Partnership #63	FMV	1,549	1,549
Limited Partnership #64	FMV	1,457,123	1,457,123
Limited Partnership #65	FMV	1,293,018	1,293,018
Limited Partnership #66	FMV	784,920	784,920
Limited Partnership #67	FMV	1,512,339	1,512,339
Limited Partnership #68	FMV	6,215,857	6,215,857
Limited Partnership #69	FMV	5,490,243	5,490,243
Limited Partnership #70	FMV	4,191,726	4,191,726
Limited Partnership #71	FMV	1,327,939	1,327,939
Limited Partnership #72	FMV	2,941,619	2,941,619
Limited Partnership #73	FMV	2,639,861	2,639,861
Limited Partnership #74	FMV	17,562,765	17,562,765
Limited Partnership #75	FMV	3,383,625	3,383,625
Limited Partnership #76	FMV	2,868,783	2,868,783
Limited Partnership #77	FMV	10,036,735	10,036,735
Limited Partnership #78	FMV	2,262,210	2,262,210
Limited Partnership #79	FMV	4,011,713	4,011,713
Limited Partnership #80	FMV	2,628,200	2,628,200
Limited Partnership #81	FMV	3,506,822	3,506,822
Limited Partnership #82	FMV	1,910,145	1,910,145
Limited Partnership #83	FMV	3,842,391	3,842,391
Limited Partnership #84	FMV	2,367,696	2,367,696
Limited Partnership #85	FMV	1,301,618	1,301,618
Limited Partnership #86	FMV	5,610,164	5,610,164
Limited Partnership #87	FMV	4,773,147	4,773,147
Limited Partnership #88	FMV	11,945,725	11,945,725
Limited Partnership #89	FMV	2,308,925	2,308,925
Limited Partnership #90	FMV	2,304,304	2,304,304
Limited Partnership #91	FMV	823,927	823,927
Limited Partnership #92	FMV	1,329,606	1,329,606
Limited Partnership #93	FMV	6,720,037	6,720,037
Limited Partnership #94	FMV	5,216,906	5,216,906
Limited Partnership #95	FMV	4,772,661	4,772,661
Limited Partnership #96	FMV	2,708,798	2,708,798
Limited Partnership #97	FMV	6,070,129	6,070,129
Limited Partnership #98	FMV	3,282,519	3,282,519
Limited Partnership #99	FMV	8,951,362	8,951,362
Limited Partnership #100	FMV	119,604	119,604
Limited Partnership #101	FMV	1,422,653	1,422,653
Limited Partnership #102	FMV	3,236,230	3,236,230
Limited Partnership #103	FMV	5,895,144	5,895,144
Limited Partnership #104	FMV	1,120,116	1,120,116
Limited Partnership #105	FMV	334,350	334,350
Limited Partnership #106	FMV	963,851	963,851
Limited Partnership #107	FMV	1,074,738	1,074,738
Limited Partnership #108	FMV	1,722,665	1,722,665
Limited Partnership #110	FMV	3,216,516	3,216,516
Limited Partnership #111	FMV	94,256	94,256
Limited Partnership #112	FMV	845,589	845,589
Limited Partnership #113	FMV	2,197	2,197
Limited Partnership #114	FMV	650,292	650,292
Limited Partnership #115	FMV	1,124,587	1,124,587
FIDELITY BALANCED	FMV	91,739	91,739
Limited Partnership #109	FMV	0	0

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Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
Furniture and Fixtures	57,516	10,504	47,012	47,012
Technology	43,866	41,941	1,925	1,925
Leasehold Improvements	1,827,664	167,811	1,659,853	1,659,853

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Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Foley & Lardner, LLP	90,334			73,918
Reinhart Boerner van Dueren, S.C.	7,585			7,585

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Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
INTANGIBLES	30,991	30,991	30,991
INTANGIBLES - AMORTIZED	15,143		

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Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Office Supplies	23,484	1,277		21,934
Computer and Office Equipment	335,139			537,562
Telephone	7,868	433		7,435
IT Software and Services	105,906	19,600		65,736
Dues and Fees	24,665			24,438
Miscellaneous Expenses	9,579			9,584
Reception and Awards Event	384,990			384,990
Other expenses from pass through		5,288,007		

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Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
ADMINISTRATIVE INCOME	177,604		
1256 Mark to Market income		-74,176	
Other Income	-4,921		
Other Income from pass through		125,411	
Commission Recapture	10,721		

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Description	Amount
Net Unrealized Gains	103,656,664

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Description	Beginning of Year - Book Value	End of Year - Book Value
Pending Purchases	3,078,470	4,907,279
Long Term Lease Liability	969,036	889,931

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Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	2,504,668	1,370,027		
CUSTODIAN FEES	350,466	350,281		
CONSULTING FEES - INVESTMENTS	647,459	762,117		
CONSULTING FEES - FINANCE	79,691			79,691
INVESTMENT MANAGEMENT FEES	392,863	310,405		
CONSULTING - EXTERNAL RELATIONS	170,007			161,607
MARKETING	67,571			67,571
PAYROLL SERVICE	5,362			5,362
Grants Management Software Consulting	33,555			33,555
IT Services	83,332			82,759
GENERAL CONSULTING - Admin	560			
Consulting HR	2,167			2,167
Consulting - Strategic Planning	9,181			9,181

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Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE AND INCOME TAXES	1,205,375			
FOREIGN TAXES PAID		9,465		
Tax from pass through		160,457		