

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

Name of foundation The Morton K and Jane Blaustein Foundation Inc		A Employer identification number 52-1607300
Number and street (or P.O. box number if mail is not delivered to street address) AFS One South Street No 2950	Room/suite	B Telephone number (see instructions) (410) 347-7201
City or town, state or province, country, and ZIP or foreign postal code Baltimore, MD 21202		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) ▶\$ 63,741,252	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)	125,000			
	2 Check ☐ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	24	24		
	4 Dividends and interest from securities . . .	932,325	924,491		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	1,723,250			
	b Gross sales price for all assets on line 6a 17,423,078				
	7 Capital gain net income (from Part IV, line 2) . . .		1,723,250		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less: Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	-1,517,840	-85,581		
	12 Total. Add lines 1 through 11	1,262,759	2,562,184		
	13 Compensation of officers, directors, trustees, etc.	0	0		0
	14 Other employee salaries and wages	202,005	0		202,005
	15 Pension plans, employee benefits	56,742	0		56,742
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	75,000	30,000		45,000
	c Other professional fees (attach schedule)	132,185	127,185		5,000
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	58,522	28,522		0
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy	30,299	0		30,299
	21 Travel, conferences, and meetings	1,487	0		1,487
	22 Printing and publications				
	23 Other expenses (attach schedule)	8,403	1,933		6,470
	24 Total operating and administrative expenses. Add lines 13 through 23	564,643	187,640		347,003
	25 Contributions, gifts, grants paid	6,454,049			6,454,049
	26 Total expenses and disbursements. Add lines 24 and 25	7,018,692	187,640		6,801,052
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	-5,755,933			
	b Net investment income (if negative, enter -0-)		2,374,544		
	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				
	2	Savings and temporary cash investments	1,539,566	3,667,989	3,667,989	
	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)				
	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)	56,664,698	48,061,986	60,073,245	
	14	Land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____				
15	Other assets (describe ▶ _____)	3,597	18	18		
16	Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	58,207,861	51,729,993	63,741,252		
Liabilities	17	Accounts payable and accrued expenses				
	18	Grants payable		92,500		
	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 ▶ _____)	0	4,727		
	23	Total liabilities (add lines 17 through 22).	0	97,227		
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	57,379,065	57,379,065		
	27	Paid-in or capital surplus, or land, bldg., and equipment fund	0	0		
	28	Retained earnings, accumulated income, endowment, or other funds	828,796	-5,746,299		
	29	Total net assets or fund balances (see instructions)	58,207,861	51,632,766		
	30	Total liabilities and net assets/fund balances (see instructions)	58,207,861	51,729,993		

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	58,207,861
2	Enter amount from Part I, line 27a	2	-5,755,933
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	52,451,928
5	Decreases not included in line 2 (itemize) ▶ _____	5	819,162
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29.	6	51,632,766

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	33,006
c	All other domestic foundations enter 1.39% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3	Add lines 1 and 2.	3	33,006
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-.	5	33,006
6	Credits/Payments:		
a	2020 estimated tax payments and 2019 overpayment credited to 2020	6a	50,139
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	10,000
d	Backup withholding erroneously withheld	6d	0
7	Total credits and payments. Add lines 6a through 6d	7	60,139
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.	8	0
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid .	10	27,133
11	Enter the amount of line 10 to be: Credited to 2021 estimated tax Refunded	11	0
	27,133		

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				
c	Did the foundation file Form 1120-POL for this year?.	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ☐ \$ 0 (2) On foundation managers. ☐ \$ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ☐ \$ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?.	4a	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) ☐ MD			
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 www.blaufund.org	13	Yes	
14	The books are in care of Jennifer L Bove CPA Telephone no. (410) 347-7205 Located at AFS One South Street Ste 2950 Baltimore MD 21202 ZIP+4 			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here ☐ and enter the amount of tax-exempt interest received or accrued during the year 15			
16	At any time during calendar year 2020, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign				

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		
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2020? ☐	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):			
a	At the end of tax year 2020, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2020? ☐ Yes ☒ No If "Yes," list the years 20 , 20 , 20 , 20			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions.)	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. 20 , 20 , 20 , 20			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2020 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period?(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2020.)	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2020?	4b		No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

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?

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

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

Yes

No

5b

No

6b

No

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
Jeanne P Blaustein	Trustee & President	0	0	0
One South Street Ste 2950 Baltimore, MD 21202	0.00			
Susan Blaustein	Trustee & Vice President	0	0	0
One South Street Ste 2950 Baltimore, MD 21202	0.00			
Alan Berlow	Trustee & Vice President	0	0	0
One South Street Ste 2950 Baltimore, MD 21202	0.00			
Peter Bokor	Trustee & Vice President	0	0	0
One South Street Ste 2950 Baltimore, MD 21202	0.00			
Betsy Ringel	Secretary	0	0	0
One South Street Ste 2950 Baltimore, MD 21202	0.00			
Anne A Patterson	Assistant Secretary	0	0	0
One South Street Ste 2950 Baltimore, MD 21202	0.00			
Stephen J Bass	Assistant Secretary	0	0	0
One South Street Ste 2950 Baltimore, MD 21202	0.00			
Jill Robinson	Assistant Secretary	0	0	0
One South Street Ste 2950 Baltimore, MD 21202	0.00			
Jennifer L Bove	Treasurer	0	0	0
One South Street Ste 2950 Baltimore, MD 21202	0.00			
Sandra L Glock	Assistant Treasurer	0	0	0
One South Street Ste 2950 Baltimore, MD 21202	0.00			

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
Tanya Herbick	Prog. Officer	136,321	44,523	0
One South Street Suite 2900 Baltimore, MD 21202	40.00			
Betsy Ringel	Exec. Director	42,721	10,919	0
One South Street Suite 2900 Baltimore, MD 21202	7.01			
Total number of other employees paid over \$50,000.				0

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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
Atapco Financial Services Inc	Acct, Tax & Invest.	75,000
One South Street Suite 2950 Baltimore, MD 21202		
Mercer	Investment Mgmt	71,915
99 High Street Boston, MA 02110		

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

0

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

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

Total. Add lines 1 through 3

0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities.	1a	55,357,458
b	Average of monthly cash balances.	1b	5,116,168
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	60,473,626
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	60,473,626
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	907,104
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	59,566,522
6	Minimum investment return. Enter 5% of line 5.	6	2,978,326

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	2,978,326
2a	Tax on investment income for 2020 from Part VI, line 5.	2a	33,006
b	Income tax for 2020. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b.	2c	33,006
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	2,945,320
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	2,945,320
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1. . . .	7	2,945,320

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	6,801,052
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	6,801,052
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	6,801,052
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				2,945,320
2 Undistributed income, if any, as of the end of 2020:				
a Enter amount for 2019 only.			0	
b Total for prior years: 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2020:				
a From 2015.	269,152			
b From 2016.	504,146			
c From 2017.	636,511			
d From 2018.	843,142			
e From 2019.	502,830			
f Total of lines 3a through e.	2,755,781			
4 Qualifying distributions for 2020 from Part XII, line 4: ▶ \$ 6,801,052				
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				2,945,320
e Remaining amount distributed out of corpus	3,855,732			
5 Excess distributions carryover applied to 2020. (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	6,611,513			
b Prior years' undistributed income. Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0		
d Subtract line 6c from line 6b. Taxable amount—see instructions.		0		
e Undistributed income for 2019. Subtract line 4a from line 2a. Taxable amount—see instructions.			0	
f Undistributed income for 2021. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2015 not applied on line 5 or line 7 (see instructions)	269,152			
9 Excess distributions carryover to 2021. Subtract lines 7 and 8 from line 6a	6,342,361			
10 Analysis of line 9:				
a Excess from 2016	504,146			
b Excess from 2017	636,511			
c Excess from 2018.	843,142			
d Excess from 2019	502,830			
e Excess from 2020	3,855,732			

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)

☐ 4942(j)(3) or ☐ 4942(j)(5)

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

Part XV

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

1

Information Regarding Foundation Managers:

a

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

b

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

2

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

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

a

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

Jeanne P Blaustein President CO Ms
BPG One South Street Ste 2900
Baltimore, MD 212023334
(410) 347-7201

b

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

Letter

c

Any submission deadlines:

None

d

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

This organization does not make gifts or grants to individuals.

Form 990-PF (2020)					Page 1					
Part XV Supplementary Information (continued)										
3 Grants and Contributions Paid During the Year or Approved for Future Payment										
<table><tr><td>Recipient</td></tr><tr><td>Name and address (home or business)</td></tr></table>	Recipient	Name and address (home or business)	<table><tr><td>If recipient is an individual, show any relationship to any foundation manager or substantial contributor</td></tr></table>	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	<table><tr><td>Foundation status of recipient</td></tr></table>	Foundation status of recipient	<table><tr><td>Purpose of grant or contribution</td></tr></table>	Purpose of grant or contribution	<table><tr><td>Amount</td></tr></table>	Amount
Recipient										
Name and address (home or business)										
If recipient is an individual, show any relationship to any foundation manager or substantial contributor										
Foundation status of recipient										
Purpose of grant or contribution										
Amount										
a <i>Paid during the year</i>										
Accelerate Change 294 Washington Street Suite 500 Boston, MA 02108	N/A	501(c)(3)	general support for voter engagement	250,000						
Advocates for Children of New York Inc 151 West 30th Street 5th Floor New York, NY 100014024	N/A	501(c)(3)	renewed support for the School Justice Project to provide advocacy and representation for youth facing court involvement, school suspension and/or emotional challenges	60,000						
ALIGN The Alliance for a Greater New York 50 Broadway 29th Floor New York, NY 100041696	N/A	501(c)(3)	renewed general support	60,000						
Alliance For Global Justice 225 East 26th Street Suite 1 Tucson, AZ 857132925	N/A	501(c)(3)	general support for the Movement for Black Live	250,000						
Alliance for Justice Eleven Dupont Circle NW Suite 500 Washington, D.C. 200361237	N/A	501(c)(3)	renewed general support for the Bolder Advocacy and Justice programs	50,000						
American Association of Colleges of Nursing PO Box 418350 Boston, MA 022418350	N/A	501(c)(3)	support for the COVID-19 Nursing Student Support Fund	25,000						
American Civil Liberties Union Foundation 125 Broad Street 18th Floor New York, NY 100042400	N/A	501(c)(3)	support for the voting rights project	300,000						
American Civil Liberties Union Foundation 125 Broad Street 18th Floor New York, NY 100042400	N/A	501(c)(3)	renewed support for the Immigrants Rights Project	75,000						
American Immigration Council 1331 G Street NW Suite 200 Washington, D.C. 200053141	N/A	501(c)(3)	renewed general support to challenge harsh enforcement policies, promote government transparency and advocate for a fair and just immigration system	75,000						
The Associated Jewish Community Federation of Baltimore Inc 101 West Mount Royal Avenue Baltimore, MD 212015781	N/A	501(c)(3)	support for The Associated's COVID-19 emergency response	10,000						
Auburn Seminary 475 Riverside Drive Suite 1800 New York, NY 101150002	N/A	501(c)(3)	renewed general support for leadership development for faith-rooted justice leaders	50,000						
Ayuda 1413 K Street NW Fifth Floor Washington, D.C. 20005	N/A	501(c)(3)	general support	50,000						
Baltimore Civic Fund One North Charles Street Suite 1600 Baltimore, MD 21201	N/A	501(c)(3)	support for the Baltimore Immigrant Community Fund: Emergency Relief for Immigrant Families	75,000						
Baltimore Community Foundation Inc 11 East Mt Royal Avenue Second Floor Baltimore, MD 21202	N/A	501(c)(3)	support for the COVID-19 Evolving Community Needs Fund	25,000						
Bend the Arc A Jewish Partnership for Justice 330 Seventh Avenue 19th Floor New York, NY 100015010	N/A	501(c)(3)	renewed general support to promote collaboration and capacity building among organizations that advance social justice as a core expression of Jewish values	35,000						
Black Voters Matter 3645 Marketplace Blvd Suite 130-209 East Point, GA 303445747	N/A	501(c)(3)	general support	150,000						
Bread for the City 1525 Seventh Street NW Washington, D.C. 200013201	N/A	501(c)(3)	general support in response to the COVID-19 emergency	10,000						
The BrotherhoodSister Sol 140 Hamilton Place New York, NY 10031	N/A	501(c)(3)	general support	75,000						
Calvary Hospital 1740 Eastchester Road Bronx, NY 104612300	N/A	501(c)(3)	support for palliative care services for adult patients with advanced cancer and other life-limiting illnesses	10,000						
Capital Area Food Bank 4900 Puerto Rico Avenue NE Washington, D.C. 20017	N/A	501(c)(3)	general support	17,000						
Capital Area Immigrants' Rights Coalition 1612 K Street NW Suite 204 Washington, D.C. 200062813	N/A	501(c)(3)	renewed general support to provide legal assistance and advocacy for immigrants at risk of deportation in Maryland and the Capital region	80,000						
Catholic Charities of Baltimore 320 Cathedral Street Baltimore, MD 212014421	N/A	501(c)(3)	support for the Immigration Legal Services program at the Esperanza Center	60,000						
Center for Secure and Modern Elections 1201 Connecticut Ave NW Suite 300 Washington, D.C. 20036	N/A	501(c)(3)	support for the Cities Project	200,000						
Chesapeake Climate Action Network 6930 Carroll Avenue Suite 720 Takoma Park, MD 209124499	N/A	501(c)(3)	renewed general support for regional campaigns to promote clean energy	75,000						
Citizens Climate Education 1330 Orange Avenue 309 Coronado, CA 921182949	N/A	501(c)(3)	general support	75,000						
Climate Mobilization Project 275 9th Street Suite 150329 Brooklyn, NY 112154430	N/A	501(c)(3)	general support	30,000						
Climate XChange 131 Cambridge Street Boston, MA 021142702	N/A	501(c)(3)	support to organize and advocate for carbon pricing in Maryland	50,000						
Color of Change Education Fund 1714 Franklin Street Suite 100-136 Oakland, CA 946123409	N/A	501(c)(3)	general support	250,000						
Comprehensive Youth Development 240 Second Avenue New York, NY 100032704	N/A	501(c)(3)	renewed support for the Legal Information Clinic for immigrant and refugee students at the Manhattan Comprehensive Night & Day School and its high school network	35,000						
Disability Rights Maryland 1500 Union Avenue Suite 2000 Baltimore, MD 212111982	N/A	501(c)(3)	renewed support to expand legal services and advocacy to the disproportionate number of students with disabilities involved in the school discipline process	75,000						
The Educational Alliance 197 East Broadway New York, NY 100025507	N/A	501(c)(3)	renewed general support for the Manny Cantor Center	50,000						
Encounter Programs Inc c/o WeWork8 W 126th Street Floor 3 New York NY 10027	N/A	501(c)(3)	renewed general support for programs that promote thoughtful conversation about the Israeli-Palestinian conflict	50,000						
Energy Justice Network 1434 Elbridge Street Philadelphia, PA 191492739	N/A	501(c)(3)	support for efforts to curb air pollution through organizing in Baltimore City	40,000						
Environmental Grantmakers Association 475 Riverside Drive Suite 960 New York, NY 101150066	N/A	501(c)(3)	general support through membership	5,159						
Feed More 1415 Rhoadmiller Street Richmond, VA 232201111	N/A	501(c)(3)	general support	16,000						
Florence Immigrant And Refugee Rights Project Inc PO Box 86299 Tucson, AZ 857546299	N/A	501(c)(3)	renewed emergency support	75,000						
The Fund for Investigative Journalism Inc 1110 Vermont Avenue NW Suite 500 Washington, D.C. 20005	N/A	501(c)(3)	renewed general support for the organization's efforts to sustain investigative journalism	60,000						
The Fund for New Citizens at the New York Community Trust 909 Third Avenue 22nd Floor New York, NY 100224752	N/A	501(c)(3)	renewed support for a collaborative regranting program focusing on advocacy and legal assistance for immigrants and refugees	75,000						
Gilchrist Hospice Care 11311 McCormick Road Suite 350 Hunt Valley, MD 210318618	N/A	501(c)(3)	general support	10,000						
Global Warming Mitigation Project PO Box 7774 Aspen, CO 816127774	N/A	501(c)(3)	support for get out the vote work centered on climate change	10,000						
Goucher College 1021 Dulaney Valley Road Baltimore, MD 212042794	N/A	501(c)(3)	renewed support for the Goucher Prison Education Partnership	25,000						
Grantmakers Concerned with Immigrants and Refugees P O Box 2178 Petaluma, CA 94953	N/A	501(c)(3)	general support through membership	2,500						
Hopewell Fund 1201 Connecticut Avenue NW Washington, D.C. 20036	N/A	501(c)(3)	general support for its project, the Movement Institute	100,000						
Immigrant Justice Corps 17 Battery Place Suite 1234 New York, NY 100041207	N/A	501(c)(3)	support to bring the Immigrant Law Fellowship Program to Maryland	75,000						
Interfaith Power and Light 100 Allison Street NW Washington, D.C. 200117303	N/A	501(c)(3)	renewed general support to advocate for climate change solutions through regional faith communities	40,000						
International Refugee Assistance Project P O Box 21917 New York, NY 100871917	N/A	501(c)(3)	renewed project support for efforts challenging policies threatening the rights of refugees and other asylum seekers in the United States	50,000						
J Street Education Fund Inc 1828 L Street NW Suite 240 Washington, D.C. 20036	N/A	501(c)(3)	renewed general support to build a movement in the US for pro-Israel, pro-peace foreign policy	25,000						
Jews United for Justice PO Box 41485 Washington, D.C. 20018	N/A	501(c)(3)	renewed general support for community organizing to fight against inequality in Maryland and DC	40,000						
The Johns Hopkins University 3400 North Charles Street Baltimore, MD 21218	N/A	501(c)(3)	capital support for building expansion at the School of Nursing	200,000						
Kids in Need of Defense 1201 L Street NW Floor 2 Washington, D.C. 200054019	N/A	501(c)(3)	general support in response to the COVID-19 emergency	10,000						
Kids in Need of Defense 1201 L Street NW Floor 2 Washington, D.C. 200054019	N/A	501(c)(3)	renewed support for KIND's Baltimore office to provide legal representation for unaccompanied immigrant children in Maryland	75,000						
Las Americas Immigrant Advocacy Center 1500 East Yandell Drive El Paso, TX 799025630	N/A	501(c)(3)	general support in response to the COVID-19 emergency	25,000						
Leadership Conference on Civil Rights Education Fund 1620 L Street NW Suite 1100 Washington, D.C. 200365695	N/A	501(c)(3)	support for the Voting and Elections Program	200,000						
Marlene Meyerson JCC Manhattan 334 Amsterdam Avenue at 76th Street New York, NY 100238205	N/A	501(c)(3)	support for What Matters: Caring Conversations About End of Life	10,000						
Martha's Table 2375 Elvans Road SE Washington, D.C. 200203543	N/A	501(c)(3)	general support	5,000						
Maryland Food Bank Inc 2200 Halethorpe Farms Road Baltimore, MD 212270000	N/A	501(c)(3)	general support	17,000						
Maryland Philanthropy Network 1600 West 41st Street Suite 700 Baltimore, MD 212111504	N/A	501(c)(3)	renewed general support through membership	5,190						
Media Matters for America 455 Massachusetts Avenue NW 6th Floor Washington, D.C. 200012621	N/A	501(c)(3)	renewed support to amplify fact- and evidence-based reporting	60,000						
Mount Sinai Hospital One Gustave L Levy Place New York, NY 100296574	N/A	501(c)(3)	support for the Hertzberg Palliative Care Institute and the Center to Advance Palliative Care	20,000						
NAACP Legal Defense and Educational Fund Inc 40 Rector Street 5th Floor New York, NY 100061738	N/A	501(c)(3)	support for the Political Participation program	250,000						
National Center for Law and Economic Justice 275 Seventh Avenue Suite 1506 New York, NY 100016860	N/A	501(c)(3)	general support for policy advocacy and litigation to advance economic justice for low-income families, individuals and communities	60,000						
Native American Rights Fund 1506 Broadway Boulder, CO 80302	N/A	501(c)(3)	support for voting rights work	50,000						
New Israel Fund PO Box 177 Lewiston, ME 042430177	N/A	501(c)(3)	renewed support to defend human rights and democratic institutions in Israel	75,000						
New Venture Fund 1201 Connecticut Ave NW Suite 300 Washington, D.C. 200362656	N/A	501(c)(3)	general support for the Analyst Institute	250,000						
The New York Immigration Coalition 131 West 33rd Street Floor 6 New York, NY 100012967	N/A	501(c)(3)	general support to promote immigrants' civic participation, leadership and unified voice	75,000						
NY Renews PO Box 29903 San Francisco, CA 941290903	N/A	501(c)(3)	renewed general support for a state-wide coalition of environmental, labor, and community groups that aims to achieve an environmentally sustainable and just New York State economy	75,000						
Our Climate Education Fund 1380 Monroe Street NW Suite 734 Washington, D.C. 20010	N/A	501(c)(3)	renewed general support to develop youth leaders to advance climate solutions	75,000						
Philanthropy New York 320 East 43rd Street New York, NY 100174801	N/A	501(c)(3)	renewed general support through membership	1,200						
Refugee and Immigrant Fund Inc 32-13 37th Street Astoria, NY 111034003	N/A	501(c)(3)	renewed support for legal and psychosocial services for newly-arrived refugees seeking asylum	40,000						
Repairers of the Breach PO Box 1638 Goldsboro, NC 275331638	N/A	501(c)(3)	general support to train faith leaders and organizers to build issue-based movements and coalitions to achieve social change and promote public policies for the common good	250,000						
The Reporters Committee for Freedom of the Press 1156 15th Street NW Suite 1020 Washington, D.C. 200051754	N/A	501(c)(3)	renewed general support to provide pro bono legal services to journalists	50,000						
The Sentencing Project 1705 Desales Street NW 8th Floor Washington, D.C. 200364405	N/A	501(c)(3)	renewed general support for the organization's work reforming criminal justice policies and practice in the United States	50,000						
Southern Center for Human Rights 60 Walton Street NW Atlanta, GA 303032149	N/A	501(c)(3)	renewed general support to work for equality and justice in the criminal legal system	75,000						
Third Sector New England 89 South Street Suite 700 Boston, MA 021112679	N/A	501(c)(3)	general support for the Workers' Justice Project	15,000						
Tides Foundation PO Box 29903 San Francisco, CA 941290903	N/A	501(c)(3)	support for the Organizing Empowerment Funds nonpartisan voter engagement work	100,000						
Tides Foundation PO Box 29903 San Francisco, CA 941290903	N/A	501(c)(3)	support for NY Renews' efforts around the Climate and Community Investment Act	20,000						
Type Media Center 116 East 16th Street 8th Floor New York, NY 100032158	N/A	501(c)(3)	renewed support for Type Investigations to facilitate the development and publication of socially significant reporting with an emphasis on human and civil rights	50,000						
University of Maryland Baltimore Foundation Inc Office of Philanthropy220 North Arch Street 13th Floor Baltimore, MD 21201	N/A	501(c)(3)	renewed support for the Positive Schools Center at the University of Maryland School of Social Work	50,000						
University of Orange 47 Cleveland Street Orange, NJ 07050	N/A	501(c)(3)	renewed support for to expand activities of the project "400 Years of Inequality"	30,000						
The Voter Participation Center 1707 L Street NW Suite 950 Washington, D.C. 200364230	N/A	501(c)(3)	general support	100,000						
Voto Latino Foundation 1300 L Street NW Suite 975 Washington, D.C. 200054107	N/A	501(c)(3)	general support	250,000						
West Harlem Environmental Action Inc 1854 Amsterdam Avenue 2nd Floor New York, NY 10031	N/A	501(c)(3)	renewed general support to build community power to fight environmental racism	75,000						
West Harlem Environmental Action Inc 1854 Amsterdam Avenue 2nd Floor New York, NY 10031	N/A	501(c)(3)	support for the Cecil Corbin-Mark Fellowship Fund	20,000						
Women In Need One State Street 18th Floor New York, NY 100041787	N/A	501(c)(3)	general support in response to the COVID-19 emergency	10,000						
Working America Education Fund 815 16th Street NW Washington, D.C. 200064101	N/A	501(c)(3)	general support	400,000						
Total			3a	6,454,049						
b <i>Approved for future payment</i>										
ALIGN The Alliance for a Greater New York 50 Broadway 29th Floor New York, NY 100041696	N/A	501(c)(3)	renewed general support	60,000						
American Civil Liberties Union Foundation 125 Broad Street 18th Floor New York, NY 100042400	N/A	501(c)(3)	renewed support for the Immigrants Rights Project	75,000						
Ayuda 1413 K Street NW Fifth Floor Washington, D.C. 20005	N/A	501(c)(3)	general support	50,000						
The BrotherhoodSister Sol 140 Hamilton Place New York, NY 10031	N/A	501(c)(3)	general support	75,000						
Catholic Charities of Baltimore 320 Cathedral Street Baltimore, MD 212014421	N/A	501(c)(3)	support for the Immigration Legal Services program at the Esperanza Center	60,000						
Citizens Climate Education 1330 Orange Avenue 309 Coronado, CA 921182949	N/A	501(c)(3)	general support	75,000						
Climate Mobilization Project 275 9th Street Suite 150329 Brooklyn, NY 112154430	N/A	501(c)(3)	general support	30,000						
Disability Rights Maryland 1500 Union Avenue Suite 2000 Baltimore, MD 212111982	N/A	501(c)(3)	renewed support to expand legal services and advocacy to the disproportionate number of students with disabilities involved in the school discipline process	75,000						
The Educational Alliance 197 East Broadway New York, NY 100025507	N/A	501(c)(3)	renewed general support for the Manny Cantor Center	50,000						
The Fund for Investigative Journalism Inc 1110 Vermont Avenue NW Suite 500 Washington, D.C. 20005	N/A	501(c)(3)	renewed general support for the organization's efforts to sustain investigative journalism	60,000						
Immigrant Justice Corps 17 Battery Place Suite 1234 New York, NY 100041207	N/A	501(c)(3)	support to bring the Immigrant Law Fellowship Program to Maryland	75,000						
International Refugee Assistance Project P O Box 21917 New York, NY 100871917	N/A	501(c)(3)	renewed project support for efforts challenging policies threatening the rights of refugees and other asylum seekers in the United States	50,000						
Jews United for Justice PO Box 41485 Washington, D.C. 20018	N/A	501(c)(3)	renewed general support for community organizing to fight against inequality in Maryland and DC	40,000						
Kids in Need of Defense 1201 L Street NW Floor 2 Washington, D.C										

Part XVII

Yes	No
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[illegible]

1a(1)		No
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1a(2)		No
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[illegible]

1b(1)		No
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1b(2)		No
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1b(3)		No
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1b(4)		No
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1b(5)		No
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1b(6)		No
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1c		Nc
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[illegible]

☐ Yes ☒ No

b If "Yes," complete the following schedule.

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

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

2021-11-14

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
	Sandra L Glock				P00251373
	Firm's name ☐ ATAPCO FINANCIAL SERVICES INC				Firm's EIN ☐ 52-217467
	Firm's address ☐ 1 South Street Suite 2950 Baltimore, MD 21202				Phone no. (410) 347-7114

Additional Data

Return to Form

Software ID:

Software Version:

Form 990PF - Special Condition Description:

Special Condition Description

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF. ▶ Go to www.irs.gov/Form990 for the latest information.	OMB No. 1545-0047
		2020
Name of the organization The Morton K and Jane Blaustein Foundation Inc		Employer identification number 52-1607300

Organization type (check one):

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

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

General Rule

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

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year ▶ \$ _____

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

Name of organization
The Morton K and Jane Blaustein
Foundation Inc

Employer identification number
52-1607300

Part I

Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	Lord Baltimore Capital Corp 6225 Smith Avenue Suite B-100 Baltimore, MD 212093623	\$ 125,000	☒ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)

Name of organization The Morton K and Jane Blaustein Foundation Inc	Employer identification number 52-1607300
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Part II **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

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

Name of organization The Morton K and Jane Blaustein Foundation Inc	Employer identification number 52-1607300
---	--

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

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

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	

Additional Data

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Software ID:

Software Version:

TY 2020 IRS 990 e-File Render

Name: The Morton K and Jane Blaustein
Foundation Inc

EIN: 52-1607300

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Accounting Fees	75,000	30,000		45,000

Name: The Morton K and Jane Blaustein
Foundation Inc
EIN: 52-1607300

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
ASF VI	AT COST	0	133,855
ASF VIII	AT COST	174,755	242,544
BGI Equity Index	AT COST	13,855,888	16,771,934
Boston Partners Int'l Eqty	AT COST	1,152,576	1,226,409
Commonfund Int'l PEP VI	AT COST	160,689	176,643
Commonfund PEP V	AT COST	1,908	1,888
Commonfund PEP VII	AT COST	218,330	234,633
Commonfund Venture VI	AT COST	51,181	56,783
Commonfund Venture VIII	AT COST	282,145	324,716
First Eagle Global	AT COST	3,806,461	5,363,747
Aberdeen (Flag) Int'l Partners II	AT COST	277,469	512,913
Aberdeen (Flag) International Partners	AT COST	239,483	336,298
Aberdeen (Flag) Private Equity III LP	AT COST	127,755	144,083
Aberdeen (Flag) Private Equity IV LP	AT COST	208,739	361,998
Aberdeen (Flag) Venture Partners VI	AT COST	218,023	317,284
Ironwood Int'l	AT COST	913,843	2,192,825
Ironwood Int'l Class A4S4	AT COST	88,991	109,354
JP Morgan Riverbridge Equities	AT COST	1,116,756	2,605,576
Lazard GL Infrastructure	AT COST	1,802,978	1,670,717
Lighthouse Global Long	AT COST	1,100,000	1,620,597
MetWest Total Return	AT COST	3,511,427	3,616,091
MFS Sers Tr X Int'l Growth I	AT COST	531,317	1,070,550
Neuberger Berman	AT COST	45,442	44,732
Oaktree Opp Fund X	AT COST	877,736	855,375
Oaktree Opp Fund XB	AT COST	597,006	583,961
Oaktree Real Estate Fd V	AT COST	160,681	141,990
RBC Fds Tr Emkt Eqty I	AT COST	2,171,480	2,663,263
Siguler Guff Fund III	AT COST	76,848	172,433
Spur Ventures III	AT COST	587,235	1,492,998
Vanguard Inflation Protected	AT COST	1,320,404	1,439,030
Ninety One Global Franchise	AT COST	4,206,164	5,557,031
Spur Ventures VI	AT COST	171,003	188,270
Ecosystem Investment Partners IV	AT COST	56,311	58,000
John Hancock II Small Cap Value	AT COST	2,547,995	2,417,632
Artisan Partners Sustainable Emerging Markets	AT COST	2,643,000	2,746,512
Voya Securitized Credit	AT COST	2,686,638	2,506,395
Coller International	AT COST	0	30,605
AXA Secondary Fund V	AT COST	0	8,580
SJF Ventures V	AT COST	73,329	75,000

TY 2020 IRS 990 e-File Render

Name: The Morton K and Jane Blaustein
Foundation Inc

EIN: 52-1607300

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
Dividend receivable	3,597	1 8	1 8

TY 2020 IRS 990 e-File Render

Name: The Morton K and Jane Blaustein
Foundation Inc

EIN: 52-1607300

Description	Amount
Book/Tax adjustment to Neuberger Berman	819,162

TY 2020 IRS 990 e-File Render

Name: The Morton K and Jane Blaustein
Foundation Inc
EIN: 52-1607300

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Equipment & Equipment Maintenance	3,620	0		3,620
Supplies	205	0		205
Telephone	1,060	0		1,060
Bank Fee	14	0		14
Software	293	0		293
Postage	673	0		673
Website	515	0		515
Dues & Subscriptions	90	0		90
Other Investment Fees	1,933	1,933		0

TY 2020 IRS 990 e-File Render

Name: The Morton K and Jane Blaustein
Foundation Inc
EIN: 52-1607300

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
BGI Equity	-15,162	-15,162	-15,162
Book income/alternative investments	-1,526,054		-1,526,054
Boston Partners Int'l Eqty	-10,147	-10,147	-10,147
Commonfund Intl Vent VI	-3,928	-6,065	-3,928
Commonfund PEP V	-881	-763	-881
Commonfund PEP VII	-3,298	-10,153	-3,298
Commonfund Venture Pt VI	10,454	10,357	10,454
Commonfund Venture VIII	-3,540	-3,536	-3,540
Aberdeen (Flag) International	-5,163	-5,147	-5,163
Aberdeen (Flag) Intl Partners II	-7,619	-7,619	-7,619
Aberdeen (Flag) Priv Eq III	-5,669	-8,679	-5,669
Aberdeen (Flag) Priv Eq IV	-6,790	-8,039	-6,790
Aberdeen (Flag) Venture VI	-3,341	-3,330	-3,341
Neuberger Berman	110,034	72,200	110,034
Oaktree Opp Fund X, LP	-29,838	-29,838	-29,838
Oaktree Opp Fund XB, LP	-17,283	-39,798	-17,283
Oaktree Real Estate Fd V	32,613	12,313	32,613
Sigular Guff	-2,286	-2,304	-2,286
Spur Ventures III	3,591	3,591	3,591
Spur Ventures VI	-17,889	-17,889	-17,889
Ecosystem Investment Partners IV	-9,246	-9,246	-9,246
SJF Ventures V	-1,671	-1,671	-1,671
New Mountain VI	-4,727	-4,656	-4,727

TY 2020 IRS 990 e-File Render

Name: The Morton K and Jane Blaustein
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EIN: 52-1607300

Description	Beginning of Year - Book Value	End of Year - Book Value
Losses Taken Using Debt Basis	0	4,727

TY 2020 IRS 990 e-File Render

Name: The Morton K and Jane Blaustein
Foundation Inc

EIN: 52-1607300

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Mercer Advisory	71,915	71,915		0
BGI Equity	31,250	31,250		0
JP Morgan RiverBridge	24,020	24,020		0
Consulting	5,000	0		5,000

TY 2020 IRS 990 e-File Render

Name: The Morton K and Jane Blaustein
Foundation Inc

EIN: 52-1607300

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Foreign Tax	28,427	28,427		0
State taxes	95	95		0
Excise Tax	30,000	0		0