

990-PF

Form
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 ALTECSTYSLINGER FOUNDATION		A Employer identification number 72-1372302	
Number and street (or P.O. box number if mail is not delivered to street address) 210 INVERNESS CENTER DR		Room/suite	B Telephone number (see instructions) (205) 991-7733
City or town, state or province, country, and ZIP or foreign postal code BIRMINGHAM, AL 35242		C If exemption application is pending, check here ☐	
G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here..... ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ... ☐	
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶\$ <u>126,682,151</u>		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses (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)	10,125,000			
	2 Check ☐ if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	1,232,315	1,232,315		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	19,430,190			
	b Gross sales price for all assets on line 6a <u>196,550,663</u>				
	7 Capital gain net income (from Part IV, line 2)		19,430,190		
	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)	72,470	68,667		
	12 Total. Add lines 1 through 11	30,859,975	20,731,172		
	13 Compensation of officers, directors, trustees, etc.	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	5,000	1,250		3,750
	c Other professional fees (attach schedule)	67,460	67,460		0
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	209,342	21,742		0
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	543,679	587,805		0
	24 Total operating and administrative expenses. Add lines 13 through 23	825,481	678,257		3,750
	25 Contributions, gifts, grants paid	6,139,644			6,139,644
	26 Total expenses and disbursements. Add lines 24 and 25	6,965,125	678,257		6,143,394
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	23,894,850			
	b Net investment income (if negative, enter -0-)		20,052,915		
	c Adjusted net income (if negative, enter -0-)				

Part II		Balance Sheets	Beginning of year		End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value	
Assets	1	Cash—non-interest-bearing	841,009	1,390,618	1,390,618	
	2	Savings and temporary cash investments	6,093,718	7,645,354	7,645,354	
	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)	7,790,848	19,998,242	19,999,638	
	b	Investments—corporate stock (attach schedule)	58,816,226	61,600,450	68,799,499	
	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)	14,212,002	21,230,252	28,847,042	
	14	Land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____				
15	Other assets (describe ▶ _____)					
16	Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	87,753,803	111,864,916	126,682,151		
Liabilities	17	Accounts payable and accrued expenses				
	18	Grants payable				
	19	Deferred revenue.				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable (attach schedule)				
	22	Other liabilities (describe ▶ _____)				
	23	Total liabilities (add lines 17 through 22).	0	0		
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ ☐ and complete lines 24, 25, 29 and 30.					
	24	Net assets without donor restrictions				
	25	Net assets with donor restrictions				
	Foundations that do not follow FASB ASC 958, check here ▶ ☒ and complete lines 26 through 30.					
	26	Capital stock, trust principal, or current funds	0	0		
	27	Paid-in or capital surplus, or land, bldg., and equipment fund	0	0		
	28	Retained earnings, accumulated income, endowment, or other funds	87,753,803	111,864,916		
	29	Total net assets or fund balances (see instructions)	87,753,803	111,864,916		
30	Total liabilities and net assets/fund balances (see instructions) .	87,753,803	111,864,916			

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 87,753,803
2	Enter amount from Part I, line 27a	2 23,894,850
3	Other increases not included in line 2 (itemize) ▶ _____	3 275,418
4	Add lines 1, 2, and 3	4 111,924,071
5	Decreases not included in line 2 (itemize) ▶ _____	5 59,155
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29.	6 111,864,916

Part IV

Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1 a CENTENNIAL REAL ESTATE FUND IV LP - LT	P	2019-12-31	2020-12-31
b COSTANOA VENTURE CAPITAL I - LT	P	2019-12-31	2020-12-31
c FORAGER FUND LP - LT	P	2019-12-31	2020-12-31
d KNOLL VENTURES FUND I LP - LT	P	2019-12-31	2020-12-31
e STONE RIDGE REINSURANCE RISK PREMIUM INTERVAL FUND - LT	P	2019-12-31	2020-12-31
SCHWAB - PUBLICLY TRADED SECURITIES - LT	P	2019-12-31	2020-12-31
FIDELITY - PUBLICLY TRADED SECURITIES - LT	P	2019-12-31	2020-12-31
CLEARVUE PARTNERS - ST	P	2020-01-01	2020-12-31
COSTANOA VENTURE CAPITAL I - ST	P	2020-01-01	2020-12-31
FORAGER FUND LP - ST	P	2020-01-01	2020-12-31
KWHP - ST	P	2020-01-01	2020-12-31
SCHWAB - PUBLICLY TRADED SECURITIES - ST	P	2020-01-01	2020-12-31
CAPITAL GAINS DIVIDENDS	P		

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 168,724			168,724
b		24,203	-24,203
c 20,555			20,555
d 7,134			7,134
e 492,225		559,623	-67,398
67,121,249		48,562,917	18,558,332
564,269		528,721	35,548
22,059			22,059
390			390
		5,568	-5,568
53,399			53,399
128,089,044		127,439,441	649,603
11,615			11,615

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
(j) F.M.V. as of 12/31/69	(k) Adjusted basis as of 12/31/69	(l) Excess of col. (i) over col. (j), if any	
a			168,724
b			-24,203
c			20,555
d			7,134
e			-67,398
			18,558,332
			35,548
			22,059
			390
			-5,568
			53,399
			649,603
			11,615

Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	19,430,190
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8	{	3	

Part V

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

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

1 Reserved	
(a) Reserved	(b) Reserved
(c) Reserved	(d) Reserved
2 Reserved	2
3 Reserved.	3
4 Reserved	4
5 Reserved	5
6 Reserved	6
7 Reserved	7
8 Reserved ,	8

Part 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	278,736
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	278,736
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	278,736
6	Credits/Payments:		
a	2020 estimated tax payments and 2019 overpayment credited to 2020	6a	41,720
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	250,000
d	Backup withholding erroneously withheld	6d	0
7	Total credits and payments. Add lines 6a through 6d	7	291,720
8	Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached.	8	4,985
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	7,999
11	Enter the amount of line 10 to be: Credited to 2021 estimated tax Refunded	11	0

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).			No
	<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>			
1c				No
c	Did the foundation file Form 1120-POL for this year?			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?	2		No
	<i>If "Yes," attach a detailed description of the activities.</i>			
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?	5		No
	<i>If "Yes," attach the statement required by General Instruction T.</i>			
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) ☐ AL			
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 ▶ <u>N/A</u>	13	Yes	
14	The books are in care of ▶ <u>ALLEN W RITCHIE</u> Telephone no. ▶ <u>(205) 991-7733</u> Located at ▶ <u>210 INVERNESS CENTER DR BIRMINGHAM AL 35242</u> 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 <u>15</u>			
16	At any time during calendar year 2020, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign	16	Yes	No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐	1b		
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 ▶ <u>20____, 20____, 20____, 20____</u>			
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. ▶ <u>20____, 20____, 20____, 20____</u>			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2020 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period?(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2020.)	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2020?	4b		No

Part VII-B

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

5a

During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes

☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

☐ Yes

☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes

☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions.

☐ Yes

☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes

☒ No

b

If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions

Organizations relying on a current notice regarding disaster assistance check here.

☐

c

If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

☐ Yes

☐ No

If "Yes," attach the statement required by Regulations section 53.4945–5(d).

6a

Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes

☒ No

b

Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

☐ Yes

☒ No

If "Yes" to 6b, file Form 8870.

7a

At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes

☒ No

b

If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?

☐ Yes

☒ No

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

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
LEE J STYSLINGER JR DEC 102421 210 INVERNESS CENTER DRIVE BIRMINGHAM, AL 35242	CHAIRMAN 1.00	0	0	0
LEE J STYSLINGER III 210 INVERNESS CENTER DRIVE BIRMINGHAM, AL 35242	PRESIDENT & CEO 1.00	0	0	0
ALLEN W RITCHIE 210 INVERNESS CENTER DRIVE BIRMINGHAM, AL 35242	SECRETARY 1.00	0	0	0

2

Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total

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

0

Form 990-PF (2020)

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
FIDELITY INVESTMENTS	INVESTMENT ADVISORY SERVICES	67,460
PO BOX 28019		
ALBUQUERQUE,NM 871258019		

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	82,319,805
b	Average of monthly cash balances.	1b	5,818,532
c	Fair market value of all other assets (see instructions).	1c	28,947,043
d	Total (add lines 1a, b, and c).	1d	117,085,380
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	117,085,380
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	1,756,281
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	115,329,099
6	Minimum investment return. Enter 5% of line 5.	6	5,766,455

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	5,766,455
2a	Tax on investment income for 2020 from Part VI, line 5.	2a	278,736
b	Income tax for 2020. (This does not include the tax from Part VI.)	2b	7,878
c	Add lines 2a and 2b.	2c	286,614
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	5,479,841
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	5,479,841
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	5,479,841

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	6,143,394
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	6,143,394
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	6,143,394

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				5,479,841
2 Undistributed income, if any, as of the end of 2020:				
a Enter amount for 2019 only.			0	
b Total for prior years: 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2020:				
a From 2015.				
b From 2016.	171,295			
c From 2017.	1,158,050			
d From 2018.	580,072			
e From 2019.				
f Total of lines 3a through e.	1,909,417			
4 Qualifying distributions for 2020 from Part XII, line 4: ► \$ 6,143,394				
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				5,479,841
e Remaining amount distributed out of corpus	663,553			
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	2,572,970			
b Prior years' undistributed income. Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0		
d Subtract line 6c from line 6b. Taxable amount—see instructions.		0		
e Undistributed income for 2019. Subtract line 4a from line 2a. Taxable amount—see instructions.			0	
f Undistributed income for 2021. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2015 not applied on line 5 or line 7 (see instructions)	0			
9 Excess distributions carryover to 2021. Subtract lines 7 and 8 from line 6a	2,572,970			
10 Analysis of line 9:				
a Excess from 2016	171,295			
b Excess from 2017	1,158,050			
c Excess from 2018.	580,072			
d Excess from 2019				
e Excess from 2020	663,553			

Part XIV

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

[illegible]

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

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).)

LEE J STYSLINGER JR DEC 102421

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

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

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

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

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

c Any submission deadlines:

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

Form 990-PF (2020)						Page 11
Part II Grants and Contributions Paid During the Year or Approved for Future Payment						
Recipient	If recipient is an individual, show any relationship to any foundation contributor	Foundation status of recipient	Purpose of grant or contribution	Amount		
Name and address (none or business)						
a Paid during the year						
A PLUS EDUCATION PARTNERSHIP PO BOX 113038 MONTGOMERY,AL 36103	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	10,000		
AG GASTON BOYS & GIRLS CLUB PO BOX 110308 232 WILKINSON BLVD AKRON,OH 44310	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	150,000		
AKRON BOXING ACADEMY 665 SCHILLER AVE AKRON,OH 44310	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	2,500		
ALABAMA ASSOCIATION OF VETERANS FELLOWSHIP PO BOX 292305 BIRMINGHAM,AL 35229	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	1,000		
ALABAMA BICENTENNIAL MONTGOMERY,AL 36103	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	50,000		
ALABAMA COUNCIL ON ECONOMIC EDUCATION PO BOX 59288 BIRMINGHAM,AL 352599288	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	1,000		
ALABAMA POSSIBLE PO BOX 1058 BIRMINGHAM,AL 35255	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	2,500		
AMERICAN CANCER SOCIETY PO BOX 113038 BIRMINGHAM,AL 352057014	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	50		
AMERICAN HEART ASSOCIATION 1449 MEDICAL PARK DRIVE BIRMINGHAM,AL 35213	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	100		
ARCHIMEDES SOCIETY OF MCWANE SCIENCE CENTER 200 19TH STREET N BIRMINGHAM,AL 35203	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	5,000		
ARTHRITIS FOUNDATION 1355 PEACHTREE ST NE 600 ATLANTA,GA 30309	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	25		
ATLANTA GALLED ARTS COUNCIL ST JOSEPH,MO 64501	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	1,500		
ASPEN COMMUNITY FOUNDATION 455 GOLD RIVERS COURT BASALT,CO 81621	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	200,000		
AUSTRALIAN RED CROSS 219A WHELER CROSS GOSFORD,NSW 2250	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	5,000		
BANNER LAKE CLUB INC HOBBS SOUND,FL 33475	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	20,000		
BATON ROUGE AREA FOUNDATION 100 NORTH ST 900 BATON ROUGE,LA 70802	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	30,000		
BIRMINGHAM EDUCATION FOUNDATION 901 9TH AVE NORTH BIRMINGHAM,AL 35204	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	27,050		
BIRMINGHAM STRONG 2931 10TH AVE SOUTH APT 8 BIRMINGHAM,AL 35205	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	100,000		
BIRMINGHAM ZOO 2630 CAHABA ROAD BIRMINGHAM,AL 35223	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	100,000		
BOBBY JONES GOLF COURSE FOUNDATION 2560 BROOKDALE DRIVE NW ATLANTA,GA 30305	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	20,000		
BOOSTER ENTERPRISES INCOKA MOUNTAIN ELEMENTARY 5640 CAHABA VALLEY ROAD BIRMINGHAM,AL 35242	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	75		
BOY SCOUTS OF AMERICA PONY COUNCIL PO BOX 8157 ST JOSEPH,MO 64508	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	3,500		
BOYS & GIRLS CLUB OF THE TEXAS 808 N LLANO STREET FREDERICKSBURG,TX 78624	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	2,000		
BRADY ASHWORTH 225 CARSEY ROAD DERIDDER,LA 70634	NONE	I	ROOF DAMAGE, FLOOR DAMAGE, WATER DAMAGE	1,000		
BRANDYN CARTER 6067 AVALON 1501 HIGHWAY 42 LEAKE CHARLES,LA 70611	NONE	I	PROPERTY DAMAGE	1,000		
BRYAN RICHARD 1504 TRISHA CT LEAKE CHARLES,LA 70611	NONE	I	SHINGLES MISSING DUE TO PLYWOOD IN SPOTS ON EAST SIDE OF ROOF.	1,000		
BUILD URBAN PROSPERITY - BUILD UP 2301 AVENUE E BIRMINGHAM,AL 35218	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	50,000		
BIRMINGHAM INTERNATIONAL INTERCITY 1500 BROADWAY 2300 NEW YORK,NY 10036	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	25,000		
BIRMINGHAM MI 106 B MOORE RD SUITE 152 BIRMINGHAM,AL 35209	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	10,000		
CAMP SMILE - A MILE BIRMINGHAM,AL 35233	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	30,000		
CAMP SMILE-UNITED CEREBRAL PALSY OF MOBILE CONNECTOR MOBILE,AL 36607	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	1,000		
CANTERBURY UNITED METHODIST 350 OVERBROOK DRIVE BIRMINGHAM,AL 35213	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	2,500		
CAPITAL GROUP 205 EASTVIEW FOSTER AVE BARDSTOWN,KY 40004	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	1,000		
CARVER HIGH SCHOOL 3900 24TH STREET NORTH BIRMINGHAM,AL 35217	NONE	GOV	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	10,000		
CATHEDRAL OF ST JOSEPH SCHOOL & ECC 519 N 10TH STREET ST JOSEPH,MO 64501	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	500		
CHAD PATELLION 1300 E TOWN RD LOWA,LA 70647	NONE	I	TOTAL LOSS OF HOME	3,000		
CHILDREN'S FOUNDATION 5395 PLAYERS CLUB PARKWAY MEMPHIS,TN 38125	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	300		
CHILDREN FIRST ALLIANCE OF PO BOX 5248 MONTGOMERY,AL 36103	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	5,000		
CHILDREN'S HARBOR 1600 UNIVERSITY S BIRMINGHAM,AL 35233	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	6,000		
CHILDREN'S HOSPITAL OF ALABAMA 1005 7TH AVE SOUTH BIRMINGHAM,AL 35233	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	4,000		
CHILDREN'S MIRACLE NETWORK HOSPITALS 205 WEST 700 SOUTH SALT LAKE CITY,UT 84101	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	1,000		
CHILDREN'S TUMOR FOUNDATION 370 LEXINGTON AVE SUITE 2100 NEW YORK,NY 10017	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	1,000		
COLBY GRIGG 167 LEGER RD GRANT,LA 70644	NONE	I	LOST HOME	3,000		
COLLEGE CHOICE FOUNDATION 1910 OXNOR ROAD 324 HOMEWOOD,AL 35209	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	500		
COLONIAL ELEMENTARY 2941 BLUE RIDGE ROAD BIRMINGHAM,AL 35209	NONE	GOV	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	30		
COMMUNITY FURNITURE BANK 219 DISTRIBUTION DR BIRMINGHAM,AL 35209	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	5,000		
COMMUNITY PARTNERSHIP OF ALABAMA PO BOX 320189 BIRMINGHAM,AL 35232	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	500,000		
CONVENT OF DOWNTOWN MINISTRIES INC 1630 13TH AVE N BIRMINGHAM,AL 35204	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	225,000		
COOPERATION FOUNDATION DEVELOPMENT OFFICE / JSR EASTS 66TH ST NEW YORK,NY 10065	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	25,000		
CROWN'S & COLTIS FOUNDATION 733 THIRD AVENUE STE 510 NEW YORK,NY 10017	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	5,000		
CURTIS JOHNSON 270 BLUEROSE LANE DERIDDER,LA 70634	NONE	I	LOST CARPORT	1,000		
DANIELLE TILLEY 254 DORRIS JOHNSON RD PITKIN,LA 70656	NONE	I	ROOF DAMAGE	1,000		
DEAN JONES 1668 HWY 394 DELRIDGE,LA 70634	NONE	I	HOUSE SHIFTED SO THE CEILING CRACKED, TREES	1,000		
DELANO WOODS 430 EAST 4TH ST DERIDDER,LA 70634	NONE	I	ROOF DAMAGE, LEAKS, BLOCKS SHIFTED UNDER	3,000		
DERIDDER,LA 70634 1722 LONGACRE RD DERIDDER,LA 70634	NONE	I	LEAKS IN THE ROOF	1,000		
DONNA RICHARD RAGLEY,LA 70637	NONE	I	TREES ON HOUSE AND THRU ROOF	1,000		
DULUTH HERITAGE SPORTS CENTER FOUNDATION PO BOX 1565 DULUTH,MN 55807	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	5,000		
EDWARD M ARMFIELD SR CIVIC RECREATION CENTER PILOT MOUNTAIN,NC 27041	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	1,000		
ELIZABETHTOWN COMMUNITY AND TECHNICAL COLLEGE 706 COLLEGE STREET ELIZABETHTOWN,KY 42701	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	50,000		
ELON UNIVERSITY PO BOX 398 ELON,NC 27244	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	250		
EPISCOPAL DIOCESE OF ALABAMA - SAWYERVILLE DAY CAMP 521 20TH STREET NORTH BIRMINGHAM,AL 35203	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	5,000		
EXECUTIVE WOMEN INTERNATIONAL SCHOLARSHIP PROGRAM 2660 SOUTH 2300 EAST STE 211 SALT LAKE CITY,UT 84109	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	1,000		
FAU AUBURN UNIVERSITY CENTER PO BOX 68 AUBURN,AL 36831	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	1,000		
FEEDING THE WEST VIRGINIA 1025 ELECTRIC ROAD SALEM,VA 24153	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	1,700		
FOLDS OF HONOR 5800 PATTON DR OWASSO,OK 74055	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	500		
FORWARD ATLANTA 2750 SOUTHPONT DR FORSYTH PARK,GA 30297	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	10,000		
FRANK WILLIAMS 3305 PLEASANT LANE DERIDDER,LA 70634	NONE	I	LOST CARPORT	1,000		
FEDERAL ORDER OF POLICE - MOUNTAIN BROOK PO BOX 130362 BIRMINGHAM,AL 35213	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	2,000		
FIRST KEEP SMILING INC PO BOX 1565 2308 FIRST AVENUE NORTH BIRMINGHAM,AL 35203	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	15,000		
FRIENDS OF BIRMINGHAM 2612 LANE PARK ROAD BIRMINGHAM,AL 35223	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	1,000		
GERARD PLUMMER 809 NORTH TEXAS ST DERIDDER,LA 70634	NONE	I	ROOF DAMAGE	1,000		
GIRLSPRING 2101 HIGHLAND AVE BIRMINGHAM,AL 35205	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	3,000		
GLENWOOD INC 150 GLENWOOD LANE BIRMINGHAM,AL 35242	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	10,000		
GLENWOOD BAPTIST CHURCH PO BOX 369 ADAMSVILLE,AL 35005	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	5,000		
GRACE HOUSE MINISTRIES 4511 FAREWELL AVENUE FAIRFIELD,AL 35064	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	5,000		
GREATER KANSAS CITY COMMUNITY 1055 BROADWAY BLVD STE 130 KANSAS CITY,MO 64105	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	5,000		
GREENFIELD ELEMENTARY SCHOOL 288 ETZLER ROAD TROUTVILLE,VA 24175	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	100		
GREYSTONE ELEMENTARY PTA 12200 WILSON RD BIRMINGHAM,AL 35242	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	500		
HAND IN PAW 617 30TH STREET SOUTH BIRMINGHAM,AL 35203	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	15,000		
HARVARD BUSINESS SCHOOL STUDENT ASSOCIATION INC 117 WESTERN AVE 262A TEELE HALL CAMBRIDGE,MA 02138	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	300,000		
HEART GALLERY OF ALABAMA INC 100 INDEPENDENCE DR STE 200 BIRMINGHAM,AL 35209	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	5,000		
HELLERIE MINISTRIES 25560 RIVER RD STE 5 CAROL STREAM,IL 60188	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	10,000		
HICA 501 S 19029TH KY 42701 BIRMINGHAM,AL 35209	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	5,000		
HIGH MUSEUM OF ART 1280 PEACHTREE STREET NE ATLANTA,GA 30309	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	5,000		
HIGHLANDS SCHOOL 4901 OLD LEEDS RD BIRMINGHAM,AL 35213	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	50,000		
HOBBS SOUND COMMUNITY CHEST 10175 HOBBS SOUND PO BOX 511 HOBBS SOUND,FL 33475	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	25,000		
HOBBS SOUND NATURE CENTER INC 100 ESTATE RD HOBBS SOUND,FL 33455	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	1,500		
HOLY FAMILY CRISTO REY CATHOLIC HIGH SCHOOL 1822 CENTER WAY SOUTH BIRMINGHAM,AL 35205	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	50,000		
HOPE INSTITUTE PO BOX 1565 MONTGOMERY,AL 35253	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	10,000		
HOUSTON DEPOT 1500 FIRST AVE NORTH BIRMINGHAM,AL 35203	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	33,334		
HOUSTON MEDICAL CORP 12400 WILSHIRE BLVD SUITE 1505 LOS ANGELES,CA 900251030	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	5,000		
INTERNATIONAL TENNIS HALL OF FAME 194 BELLUVE AVENUE NEWPORT,RI 02840	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	15,000		
JEAN SPIKER 1682 BLANKENSHIP DR JERRY PATE NATIONAL INTERCOLLEGIATE 604 STREET NORTH BIRMINGHAM,AL 35203	NONE	I	ROOF DAMAGE, SIDING DAMAGE, TREES AND LIMBS DOWN	1,000		
JERRY PATE NATIONAL INTERCOLLEGIATE 604 STREET NORTH BIRMINGHAM,AL 35203	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	3,000		
JIMMIE HALE MISSION INC PO BOX 1047 BIRMINGHAM,AL 35202	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	250		
JONES VALLEY TEACHING FARM 701 25TH ST N BIRMINGHAM,AL 35203	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	42,000		
JORDAN RICHARD 100 BLANCHARD ROAD LAKE CHARLES,LA 70607	NONE	I	PROPERTY DAMAGE	1,000		
JOURNEY FORWARD 5 SHAWMUT RD CANTON,MA 02021	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	100,000		
JULIAN MUDD 7070 DUNN RD 321 CITY LA 70630	NONE	I	PROPERTY DAMAGE	1,000		
JUNIOR ACHIEVEMENT OF ALABAMA PO BOX 19307 BIRMINGHAM,AL 35219	NONE	PC	TO FURTHER THE EXEMPT PURPOSE OF THE ORGANIZATION	4,857		
JUPITER MEDICAL MEDICAL 100 ESTRADA SQ HOBBS SOUND,FL 3						

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	
Enter gross amounts unless otherwise indicated.				
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	1,232,315	
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.		14	68,667	
8 Gain or (loss) from sales of assets other than inventory		18	19,430,190	
9 Net income or (loss) from special events:				
10 Gross profit or (loss) from sales of inventory				
11 Other revenue:				
a STATE TAX REFUND - SC		01	3,639	
b STATE TAX REFUND - GA		01	164	
c _____				
d _____				
e _____				
12 Subtotal. Add columns (b), (d), and (e).	0		20,734,975	
13 Total. Add line 12, columns (b), (d), and (e).				20,734,975

[illegible]

Part XVII

Yes	No
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	No
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	No
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[illegible]

No

No

No

No

No

No

No

e

[illegible]

☐ Yes ☒ No

b If "Yes," complete the following schedule.

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

Sign Here

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

2021-11-15

Date

Title

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

**Paid
Preparer
Use Only**

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN
	JULIA FLANNERY				P00928918
	Firm's name ▶ RSM US LLP				Firm's EIN ▶ 42-071432
	Firm's address ▶ 100 INTERNATIONAL DRIVE SUITE 1400 BALTIMORE, MD 21202				Phone no. (410) 246-9301

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 ALTECSTYSLINGER FOUNDATION		Employer identification number 72-1372302

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 ALTECSTYSLINGER FOUNDATION	Employer identification number 72-1372302
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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	GLOBAL RENTAL COMPANY 210 INVERNESS CENTER DRIVE BIRMINGHAM, AL 35242	\$ 10,000,000	☒ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
2	MARK J STYSLINGER 3315 DELL ROAD BIRMINGHAM, AL 35223	\$ 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.)

Name of organization
ALTECSTYSLINGER FOUNDATION

Employer identification number
72-1372302

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 ALTECSTYSLINGER FOUNDATION	Employer identification number 72-1372302
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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
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
	(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: ALTECSTYSLINGER FOUNDATION
EIN: 72-1372302

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	5,000	1,250		3,750

Name: ALTECSTYSLINGER FOUNDATION
EIN: 72-1372302

Name of Stock	End of Year Book Value	End of Year Fair Market Value
AIRBUS	355,557	456,977
ADVANCE AUTO PARTS INC	272,984	322,738
ALIBABA GROUP HOLDING LTD	219,150	163,842
ALPHABET INC	331,474	627,173
AMAZON.COM	443,948	804,462
CHARTER COMMUNICATIONS INC	412,445	703,889
COMCAST CORP	369,537	473,696
DANAHER CORPORATION	351,664	958,312
FACEBOOK INC	329,097	511,629
LABORATORY CORP	355,359	462,669
LOWES COMPANIES INC	355,245	757,126
MICROSOFT CORP	266,387	805,605
SHERWIN WILLIAMS CO	298,597	659,214
UNITED HEALTH GROUP	377,543	542,502
VISA INC	332,803	414,712
ISHARES MSCI EAFE ETF	11,103,449	11,222,024
ISHARES MSCI EMERGING	3,228,670	3,291,115
ISHARES RUSSELL 2000	12,874,757	15,523,580
SPDR S&P 500 ETF	22,807,584	23,206,732
AMERICAN CAMPUS COMM	502,044	544,254
CROWN CASTLE INTL CO	855,917	819,010
DIGITAL REALTY TRUST	854,881	824,492
IRON MTN INC	866,259	916,577
PROLOGIS INC	854,950	858,778
PUBLIC STORAGE	864,186	987,698
SUN COMMUNITIES	854,312	894,169
VENTAS INC	861,651	1,046,524

TY 2020 IRS 990 e-File Render

Name: ALTECSTYSLINGER FOUNDATION

EIN: 72-1372302

**US Government Securities - End of
Year Book Value:**

19,998,242

**US Government Securities - End of
Year Fair Market Value:**

19,999,638

**State & Local Government
Securities - End of Year Book
Value:**

0

**State & Local Government
Securities - End of Year Fair
Market Value:**

0

TY 2020 IRS 990 e-File Render**Name:** ALTECSTYSLINGER FOUNDATION**EIN:** 72-1372302

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
STONE RIDGE REINSURANCE RISK PREMIUM INTERVAL FUND	AT COST	166,942	154,490
COATUE OFFSHORE FUND, LTD.	AT COST	2,000,000	4,480,591
COATUE SMART TRANSPORTATION & OFFSHORE FEEDER FUND I, LP	AT COST	2,000,000	2,713,606
OLD WELL PARTNERS FUND	AT COST	2,000,000	2,000,000
CENTENNIAL REAL ESTATE FUND IV	AT COST	194,999	194,999
CENTENNIAL REAL ESTATE FUND V	AT COST	886,501	886,501
CENTENNIAL REAL ESTATE FUND VI	AT COST	899,344	899,344
CLEARVUE PARTNERS II LTD.	AT COST	1,589,035	2,296,161
COSTANOA VENTURE CAPITAL I, LP	AT COST	0	1,178,795
COSTANOA VENTURES IV, LP	AT COST	345,000	413,656
COSTANOA VENTURES OPPORTUNITY FUND, LP	AT COST	877,337	1,434,494
COSTANOA VENTURES OPPORTUNITY FUND II, LP	AT COST	465,000	657,539
FORAGER FUND, LP	AT COST	1,000,000	1,425,606
KEMMONS WILSON HOSPITALITY PARTNERS LP	AT COST	1,104,466	879,740
KNOLL VENTURES FUND I	AT COST	326,080	360,559
MCF3A	AT COST	907,514	907,514
MCF3B	AT COST	407,050	407,050
HARDINGE (PRIVET CAPITAL)	AT COST	2,000,000	3,398,897
BREP EUROPE VI LP	AT COST	736,919	771,003
SILVER LAKE ALPINE (OFFSHORE) LP	AT COST	3,324,065	3,386,497

TY 2020 IRS 990 e-File Render

Name: ALTECSTYSLINGER FOUNDATION

EIN: 72-1372302

Description	Amount
COST BASIS ADJUSTMENT - FIDELITY	4,358
BOOK/TAX DIFFERENCE - FORAGER FUND, L.P.	13,235
BOOK/TAX DIFFERENCE - KEMMONS WILSON HOSPITALITY PARTNERS, LP	41,562

TY 2020 IRS 990 e-File Render

Name: ALTECSTYSLINGER FOUNDATION

EIN: 72-1372302

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BANK SERVICE FEE	1,111	1,111		0
INVESTMENT FEES - FROM PASSTHROUGH	162,862	178,318		0
CENTENNIAL REAL ESTATE FUND III, LP	12,287	7,632		0
CENTENNIAL REAL ESTATE FUND IV, LP	20,997	143,470		0
CENTENNIAL REAL ESTATE FUND V, LP	41,234	10,628		0
CENTENNIAL REAL ESTATE FUND VI, LP	81,657	23,115		0
KWHP	220,418	220,418		0
MCF3A	7	7		0
FORAGER FUND	3,106	3,106		0

TY 2020 IRS 990 e-File Render

Name: ALTECSTYSLINGER FOUNDATION

EIN: 72-1372302

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
MCF3B	68,667	68,667	68,667
STATE TAX REFUND - SC	3,639		3,639
STATE TAX REFUND - GA	164		164

TY 2020 IRS 990 e-File Render**Name:** ALTECSTYSLINGER FOUNDATION**EIN:** 72-1372302

Description	Amount
BOOK/TAX DIFFERENCE - CENTENNIAL REAL ESTATE FUND III, LP	101
BOOK/TAX DIFFERENCE - CENTENNIAL REAL ESTATE FUND IV, LP	52
BOOK/TAX DIFFERENCE - CENTENNIAL REAL ESTATE FUND V, LP	62
BOOK/TAX DIFFERENCE - CENTENNIAL REAL ESTATE FUND VI, LP	55
BOOK/TAX DIFFERENCE - MCF3A	11,536
BOOK/TAX DIFFERENCE - COSTANOA VENTURE CAPITAL I, LP	74,421
BOOK/TAX DIFFERENCE - OTHER	189,191

TY 2020 IRS 990 e-File Render

Name: ALTECSTYSLINGER FOUNDATION

EIN: 72-1372302

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ADVISORY FEES - FIDELITY	67,460	67,460		0

TY 2020 IRS 990 e-File Render

Name: ALTECSTYSLINGER FOUNDATION

EIN: 72-1372302

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CALIFORNIA INCOME TAX	10	0		0
FEDERAL INCOME TAX 2019	122,020	0		0
FEDERAL INCOME TAX 2020	64,125	0		0
FOREIGN	21,742	21,742		0
OTHER STATE TAXES	1,445	0		0