

Return of Private Foundation

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

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▶ **Go to www.irs.gov/Form990PF for instructions and the latest information.**

Open to Public Inspection

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

Name of foundation MARIE LAMFROM CHARITABLE FOUNDATION TRUST		A Employer identification number 93-1254171
Number and street (or P.O. box number if mail is not delivered to street address) 9740 SW HILLMAN COURT SUITE 200	Room/suite	B Telephone number (see instructions) (503) 722-3490
City or town, state or province, country, and ZIP or foreign postal code WILSONVILLE, OR 97070		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here..... <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation ... <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ <u>137,033,302</u>	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ <i>(Part I, column (d) must be on cash basis.)</i>	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions.)</i>		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule) Check <input type="checkbox"/> if the foundation is not required to attach Sch. B	112,886,304			
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	413,474	413,474		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	-68,134			
	b Gross sales price for all assets on line 6a 2,515,536				
	7 Capital gain net income (from Part IV, line 2)		0		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less: Cost of goods sold				
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule)	8,712	0			
12 Total. Add lines 1 through 11	113,240,356	413,474			
Operating and Administrative Expenses	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)	10,535	0		10,535
	b Accounting fees (attach schedule)	8,824	0		8,824
	c Other professional fees (attach schedule)	166,359	120,234		46,125
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	29,170	2,878		0
	19 Depreciation (attach schedule) and depletion	137,506	0		
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	31,917	6		31,911
	24 Total operating and administrative expenses. Add lines 13 through 23	384,311	123,118		97,395
25 Contributions, gifts, grants paid	2,605,508			2,605,508	
26 Total expenses and disbursements. Add lines 24 and 25	2,989,819	123,118		2,702,903	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	110,250,537				
b Net investment income (if negative, enter -0-)		290,356			
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	1,417,032	88,859,472	88,859,472
	2 Savings and temporary cash investments			
	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)	667,908	684,606	684,606
	b Investments—corporate stock (attach schedule)	6,447,298	19,202,644	19,202,644
	c Investments—corporate bonds (attach schedule)	7,400,724	10,364,562	10,364,562
	11 Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	3,000,430	12,530,102	12,530,102
	14 Land, buildings, and equipment: basis ▶ <u>6,237,758</u> Less: accumulated depreciation (attach schedule) ▶ <u>845,842</u>	5,429,422	5,391,916	5,391,916
15 Other assets (describe ▶ _____)				
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	24,362,814	137,033,302	137,033,302	
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 ▶ <input type="checkbox"/> 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 ▶ <input checked="" type="checkbox"/> 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	24,362,814	137,033,302	
29 Total net assets or fund balances (see instructions)	24,362,814	137,033,302		
30 Total liabilities and net assets/fund balances (see instructions)	24,362,814	137,033,302		

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	24,362,814
2 Enter amount from Part I, line 27a	2	110,250,537
3 Other increases not included in line 2 (itemize) ▶ _____	3	2,419,951
4 Add lines 1, 2, and 3	4	137,033,302
5 Decreases not included in line 2 (itemize) ▶ _____	5	0
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29	6	137,033,302

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 PUBLICLY TRADED SECURITIES			
b CAPITAL GAIN DISTRIBUTIONS	P		
c			
d			
e			

(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 2,515,536		2,584,504	-68,968
b			834
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			-68,968
b			834
c			
d			
e			

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	-68,134
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

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

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

1a Exempt operating foundations described in section 4940(d)(2), check here [] and enter "N/A" on line 1.
Date of ruling or determination letter: _____ (attach copy of letter if necessary—see instructions)
b Reserved 1 4,036
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 4,036
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 4,036
6 Credits/Payments:
a 2020 estimated tax payments and 2019 overpayment credited to 2020 6a 25,009
b Exempt foreign organizations—tax withheld at source 6b
c Tax paid with application for extension of time to file (Form 8868) 6c 0
d Backup withholding erroneously withheld 6d 0
7 Total credits and payments. Add lines 6a through 6d 7 25,009
8 Enter any penalty for underpayment of estimated tax. Check here [x] if Form 2220 is attached. 8 16
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 20,957
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 No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition). Yes No
1b No No
If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.
c Did the foundation file Form 1120-POL for this year?. Yes No
1c No 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? Yes No
2 No No
If "Yes," attach a detailed description of the activities.
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes Yes No
3 No No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? Yes No
4a No No
b If "Yes," has it filed a tax return on Form 990-T for this year? Yes No
4b No No
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? Yes No
5 No No
If "Yes," attach the statement required by General Instruction T.
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? Yes
6 Yes
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV. Yes
7 Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) OR
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation Yes
8b Yes
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2020 or the taxable year beginning in 2020? See the instructions for Part XIV. If "Yes," complete Part XIV Yes No
9 No No
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses. Yes
10 Yes

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.				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				No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>WWW.MARIELAMFROM.ORG</u>	Yes			
14	The books are in care of ► <u>SARAH BANY CO MIDWAY LLC</u> Telephone no. ► <u>(503) 722-3490</u> Located at ► <u>9740 SW HILLMAN COURT SUITE 200 WILSONVILLE OR 97070</u> ZIP+4 ► _____				
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year 15 _____				
16	At any time during calendar year 2020, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign		Yes	No	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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No					
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No					
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No					
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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 <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here. <input type="checkbox"/>	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? <input type="checkbox"/>	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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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
SARAH A BANY 9740 SW HILLMAN CT SUITE 200 WILSONVILLE, OR 97070	TRUSTEE 1.00	0	0	0
RACHAEL SNEDDON 9740 SW HILLMAN CT SUITE 200 WILSONVILLE, OR 97070	TRUSTEE 3.00	0	0	0
ANNA BANY 9740 SW HILLMAN CT SUITE 200 WILSONVILLE, OR 97070	TRUSTEE 2.00	0	0	0
RUSSELL SNEDDON 9740 SW HILLMAN CT SUITE 200 WILSONVILLE, OR 97070	TRUSTEE 0.25	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

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
BADGLEYPHELPS WEALTH MANAGERS 1420 FIFTH AVENUE SUITE 3200 SEATTLE, WA 98101	INVESTMENT MANAGEMENT	71,864

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 _____ _____	
3 All other program-related investments. See instructions. _____ _____	

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	18,432,182
b	Average of monthly cash balances.	1b	30,475,220
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	48,907,402
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	48,907,402
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	733,611
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	48,173,791
6	Minimum investment return. Enter 5% of line 5.	6	2,408,690

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	2,408,690
2a	Tax on investment income for 2020 from Part VI, line 5.	2a	4,036
b	Income tax for 2020. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b.	2c	4,036
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	2,404,654
4	Recoveries of amounts treated as qualifying distributions.	4	4,500
5	Add lines 3 and 4.	5	2,409,154
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	2,409,154

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	2,702,903
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	100,000
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	2,802,903
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	2,802,903

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				2,409,154
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.	1,345,432			
b From 2016.	839,461			
c From 2017.				
d From 2018.				
e From 2019.				
f Total of lines 3a through e.	2,184,893			
4 Qualifying distributions for 2020 from Part XII, line 4: ▶ \$ <u>2,802,903</u>				
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				2,409,154
e Remaining amount distributed out of corpus	393,749			
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	2,578,642			
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)	1,345,432			
9 Excess distributions carryover to 2021. Subtract lines 7 and 8 from line 6a	1,233,210			
10 Analysis of line 9:				
a Excess from 2016	839,461			
b Excess from 2017				
c Excess from 2018.				
d Excess from 2019				
e Excess from 2020	393,749			

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)

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

Table with 5 columns: (a) 2020, (b) 2019, (c) 2018, (d) 2017, (e) Total. Rows correspond to items 2a-e and 3a-c.

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).) SARAH A BANY

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: RACHAEL SNEDDON, 9740 SW HILLMAN COURT SUITE 200, WILSONVILLE, OR 97070, (503) 722-3490, RACHAEL@MIDWAYLLC.NET

b The form in which applications should be submitted and information and materials they should include: ONLINE FORM SUBMISSION THROUGH OUR WEBSITE.

c Any submission deadlines: NO

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

Part XV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year 1017 PROJECT PO BOX 19 POWELL BUTTE,OR 97753		P C	HIGH QUALITY PROTEIN TO FOOD BANKS CENTRAL OR	20,000
ADELANTE MUJERES 2030 MAIN STREET SUITE A FOREST GROVE,OR 97116		P C	CHICAS YOUTH DEVELOPMENT PROGRAM SUPPORT	10,000
AGE US 15900 SE 82ND DRIVE CLACKAMAS,OR 97015		P C	AGELESS AWARD LUNCHEON	2,500
ASSISTANCE DOGS OF HAWAII PO BOX 1803 MAKAWAO,HI 96768		P C	SUPPORT A PORTLAND, OR AREA SERVICE DOG	20,000
BAKER SCHOOL DISTRICT 5J 2090 FOURTH STREET BAKER CITY,OR 97814		GOV	70 HOT SPOTS FOR STUDENTS CONTINUING EDUCATION, ADVERSELY IMPACTED BY COVID-19	8,400
BIG BROTHERS BIG SISTERS COLUMBIA NW 6443 SW BEAVERTON-HILLSDALE HIGHWAY SUITE 200 PORTLAND,OR 97221		P C	OPERATIONAL EXPENSES	32,500
BIRDNOTE PO BOX 99456 SEATTLE,WA 98139		P C	UNRESTRICTED	5,000
BOYS & GIRLS CLUB OF PORTLAND METRO PO BOX 820209 PORTLAND,OR 97282		P C	SUPPORT FOR 60+ MEALS & SNACKS	10,000
BRIDGE MEADOWS 8502 N WAYLAND AVENUE PORTLAND,OR 97203		P C	GIFT OF EMERGENCY FUNDING DUE TO CANCELLATION OF ANNUAL MAY LUNCHEON	50,000
CAUSA OREGON 700 MARION STREET NE SALEM,OR 97301		P C	OREGON WORKER RELIEF FUND	250,000
CHEETAH CONSERVATION FUND 200 DAINGERFIELD ROAD 200 ALEXANDRIA,VA 22314		P C	2020 GRANT - ONLINE DONATION	5,000
CHILDREN'S CANCER ASSOCIATION 1200 NW NAITO PARKWAY SUITE 140 PORTLAND,OR 97209		P C	MYMUSICRX FOR HOSPITALIZED KIDS IN PORTLAND	10,000
CITY OF SUBLIMITY 245 NW JOHNSON STREET SUBLIMITY,OR 97385		GOV	MATERIAL TO MAKE CLOTH MASK FOR STAFF/RESIDENTS OF MARIAN ESTATES - COVID-19	8,000
CLACKAMAS COMMUNITY COLLEGE FOUNDATION 19600 MOLALLA AVENUE OREGON CITY,OR 97045		P C	OUTSIDE THE BOX"" GIFT FOR STUDENT #1097298	2,238
COMMUNITY FOUNDATION OF SW LOUISIANA 1625 RYAN STREET SUITE C LAKE CHARLES,LA 70601		P C	EMERGENCY SUPPORT FOR LOUISIANA HURRICANES	80,000
COUNCIL ON AGING OF CENTRAL OREGON 373 NE GREENWOOD AVENUE BEND,OR 97701		P C	EMERGENCY NEEDS ADD'L STAFF, VOLUNTEER WORKFORCE, CRITICAL MEAL DELIVERIES FOR OLDER ADULTS	10,000
COUNCIL ON ALCOHOLISM & DRUG ABUSE PO BOX 28 SANTA BARBARA,CA 93102		P C	TOM SNEDDON ROOM @ DANIEL BRYANT YOUTH & FAMILY CENTER	15,000
CURRY HEALTH FOUNDATION PO BOX 1274 GOLD BEACH,OR 97444		P C	SUPPORT TO MAKE UP FOR CANCELLATION OF MAJOR FUNDRAISER	7,500
DAISY CHAIN PO BOX 10375 EUGENE,OR 97440		P C	SUPPORT OPERATING EXPENSES FOR CON'T CARE DUE TO CANCELLATION OF ANNUAL FUNDRAISER	5,000
DALLAS EMERGENCY FOOD BANK 322 S MAIN STREET SUITE 180 DALLAS,OR 97338		P C	FUNDS TO PURCHASE FOOD & KEEP DOORS OPEN	10,000
DE LA SALLE NORTH CATHOLIC HIGH SCHOOL		P C	SUPPORT RENOVATION OF ART CLASSROOM	250,000

528 N FENWICK AVENUE PORTLAND,OR 97217				
DISJECTA CONTEMPORARY ART CENTER 8371 N INTERSTATE AVENUE PORTLAND,OR 97217		P C	CURATOR IN RESIDENCE PROGRAM	10,000
ECONOMIC ACTION GROUP INC PO BOX 32 YOUNGSTOWN,OH 44501		P C	ROBINSON-SHUBA COMMEMORATIVE STATUE PROJECT	175,000
EQUAMORE FOUNDATION 4723 HIGHWAY 66 ASHLAND,OR 97520		P C	CARE FOR HORSES @ FACILITY, FEED, VETERINARY CARE, OPERATING EXP. FOR STAFF - COVID-19	5,000
EUGENE MISSION PO BOX 1149 EUGENE,OR 97440		P C	SUPPORT DAILY OPERATIONS & UTILITY COSTS INCREASE OF MISSION	10,000
FAMILY BUILDING BLOCKS 2425 LANCASTER DRIVE NE SALEM,OR 97305		P C	PURCHASE OF DIAPERS, HELP SUPPORT DONATION LOSS FOR APRIL DIAPER DRIVE	5,000
FARMERS MARKET FUND 240 N BROADWAY PORTLAND,OR 97227		P C	PRESERVATION OF DUFB, PUT \$ IN POCKETS OF SMALL FARMERS EXPERIENCING HARDSHIP	5,000
FLORENCE FOOD SHARE PO BOX 2514 FLORENCE,OR 97439		P C	FUNDS TO KEEP PANTRY STOCKED, ASSIST LOCAL SCHOOLS PROVIDING MEALS TO STUDENTS	20,000
FRIENDS OF THE CHILDREN 44 NE MORRIS STREET 3015 PORTLAND,OR 97212		P C	EMERGENCY COVID-19 GIFT CARDS FOR CHILDREN & FAMILIES IN NEED	25,000
GIRL SCOUTS OF OREGON & SW WASHINGTON 9620 SW BARBUR BOULEVARD PORTLAND,OR 97219		P C	BEYOND BARS PROGRAM	30,000
GIRLS BUILD PO BOX 11893 PORTLAND,OR 97211		P C	SUMMER BUILDING CAMPS FOR 8 - 14 YR OLD GIRLS	27,340
GONZAGA UNIVERSITY 502 E BOONE AVENUE SPOKANE,WA 99258		P C	3 STUDENTS FOR 4 YEARS + ACTIVITY FUND & PLEDGE PAYMENT #2 FOR DAVE BANY SCHOLARSHIP PROGRAM	123,000
IMPACT NW PO BOX 33530 PORTLAND,OR 97292		P C	HOMELESS PREVENTION SERVICES FOR FAMILIES W/ CHILDREN	20,000
JESUIT HIGH SCHOOL FOUNDATION 9000 SW BEAVERTON HILLSDALE HIGHWAY PORTLAND,OR 97225		P C	TUITION FOR 2 STUDENTS FOR 1 YEAR	32,000
LINES FOR LIFE 5100 S MACADAM AVENUE SUITE 400 PORTLAND,OR 97239		P C	GENERAL OPERATIONS	10,000
MAKE-A-WISH FOUNDATION OF OREGON 5901 S MACADAM AVENUE SUITE 200 PORTLAND,OR 97239		P C	SUPPORTING A GRANT OF 5 LOCAL WISHES	75,000
MCMINNVILLE AREA HABITAT FOR HUMANITY PO BOX 301 MCMINNVILLE,OR 97128		P C	WOMEN BUILD 2020 PROJECT	10,000
MEALS ON WHEELS PEOPLE 7710 SW 31ST AVENUE PORTLAND,OR 97219		P C	EMERGENCY COVID-19 FUNDING FOR MORE MEALS TO PEOPLE	50,000
MERRY HEART CHILDREN'S CAMP PO BOX 80413 PORTLAND,OR 97280		P C	SUPPORT CAMP & COUNSELOR TRAINING	3,500
MRG FOUNDATION PO BOX 12489 PORTLAND,OR 97212		P C	ROGUE VALLEY RELIEF FUND	250,000
OHSU FOUNDATION 1121 SW SALMON STREET 100 PORTLAND,OR 97205		P C	IN MEMORY OF ARLENE SCHNITZER	5,000
OREGON BLACK PIONEERS 117 COMMERCIAL STREET NE 210 SALEM,OR 97301		P C	EXPANDING ORGANIZATIONAL CAPACITY & SUSTAINABILITY BY HIRING 1ST STAFF	25,000
OREGON FOOD BANK 7900 NE 33RD DRIVE PORTLAND,OR 97211		P C	EMERGENCY COVID-19 SUPPORT FUNDING & FOOD FOR PEOPLE IN NEED OF FOOD BOXES & ACCESS TO PANTRIES	50,000

OREGON MUSEUM OF SCIENCE AND INDUSTRY 1945 SE WATER AVENUE PORTLAND,OR 97214		P C	2020 GALA DIAMOND JUBILEE SPONSOR	25,000
PEAR 338 NW 6TH AVENUE PORTLAND,OR 97209		P C	TO PURCHASE P:EAR'S BUILDING @ 338 NW 6TH AVENUE	30,000
PARK ACADEMY 1915 SOUTH SHORE BOULEVARD LAKE OSWEGO,OR 97034		P C	MUSIC PROGRAM	30,000
PARTNERS FOR A HUNGER-FREE OREGON 712 SE HAWTHORNE BOULEVARD PORTLAND,OR 97214		P C	SUMMER MEAL OUTREACH ACROSS OREGON PROGRAM	5,000
PDX DIAPER BANK PO BOX 22613 PORTLAND,OR 97269		P C	EMERGENCY COVID FUNDING	5,280
PHOENIX-TALENT SCHOOLS FIRE RELIEF FUND 401 WEST 4TH STREET PHOENIX,OR 97535		GOV	2020 GRANT	250,000
PORTLAND BACKPACK 2620 NE FREMONT STREET PORTLAND,OR 97212		P C	SUMMER 2020 LUNCH FUNDING	40,000
PROJECT SOUTH 9 GAMMON AVENUE SE ATLANTA,GA 30315		P C	IMAGINE WATER WORKS	10,000
PROVIDENCE CHILDREN'S HEALTH FOUNDATION 830 NE 47TH AVENUE PORTLAND,OR 97213		P C	THERAPEUTIC RECREATION PROGRAM FOR MEDICALLY FRAGILE CHILDREN (CMFC)	10,000
SANTA BARBARA RESCUE MISSION 535 E YANONALI STREET SANTA BARBARA,CA 93103		P C	BETHEL HOUSE IN HONOR OF PAMELA SNEDDON	10,000
SANTIAM CANYON WILDFIRE RELIEF FUND 11758 SUBLIMITY ROAD SUBLIMITY,OR 97385		P C	2020 GRANT	250,000
SELF ENHANCEMENT INC 3920 N KERBY AVENUE PORTLAND,OR 97227		P C	COVID-19 RELIEF - PIVOT TO VIRTUAL AFTER SCHOOL ONLINE PROGRAMMING & ONLINE ACCESS	20,000
SHARE THE LOVE - MOLALLA HIGH SCHOOL 357 E FRANCIS STREET MOLALLA,OR 97038		GOV	GENERAL OPERATIONS	55,000
THE DOUGY CENTER PO BOX 86852 PORTLAND,OR 97206		P C	CREATION & EXECUTION FOR ADD'L GRIEF GROUP TO ACCOMMODATE INCREASE IN KIDS/TEENS SEEKING SUPPORT	15,000
THE LITTLE MARKET 3400 S SUSAN STREET UNIT B SANTA ANA,CA 92704		P C	GENERAL FUND CONTRIBUTION	25,000
THE RED DOOR PROJECT 3121 S MOODY AVENUE SUITE 140 PORTLAND,OR 97239		P C	GRANT AWARD	15,000
TUCKER MAXON SCHOOL 2860 SE HOLGATE BOULEVARD PORTLAND,OR 97202		P C	MUSIC PROGRAM - HIRE A MUSIC TEACHER	10,000
VICTORY ACADEMY AND 7 OTHER PUBLIC CHARITIES 12155 SW TOOZE ROAD SHERWOOD,OR 97140		P C	GENERAL OPERATIONS	1,250
YWCA OF GREATER PORTLAND 4610 SE BELMONT STREET PORTLAND,OR 97215		P C	FAMILY PRESERVATION PROJECT: WORKS W/ INCARCERATED MOMS @ COFFEE CREEK CORRECTIONAL FACILITY	22,000
Total			▶ 3a	2,605,508
b <i>Approved for future payment</i>				
Total			▶ 3b	0

Additional Data

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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 MARIE LAMFROM CHARITABLE FOUNDATION TRUST	Employer identification number 93-1254171
--	---

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
 MARIE LAMFROM CHARITABLE
 FOUNDATION TRUST

Employer identification number
 93-1254171

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	GERTRUDE BOYLE TRUST 9740 SW HILLMAN COURT SUITE 200 WILSONVILLE, OR 97070	\$ 112,886.304	<input checked="" type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)

Name of organization
 MARIE LAMFROM CHARITABLE
 FOUNDATION TRUST

Employer identification number
 93-1254171

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
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____

Name of organization MARIE LAMFROM CHARITABLE FOUNDATION TRUST	Employer identification number 93-1254171
--	--

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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TY 2020 IRS 990 e-File Render

Name: MARIE LAMFROM CHARITABLE
FOUNDATION TRUST

EIN: 93-1254171

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX SERVICES - GARY MCGEE & CO. LLP	8,824	0		8,824

TY 2020 IRS 990 e-File Render

Name: MARIE LAMFROM CHARITABLE
FOUNDATION TRUST

EIN: 93-1254171

Identifier	Return Reference	Explanation
SECTION 1.263(A)-1(F) DEMINIMIS SAFE HARBOR ELECTION	PART II, LINE 14	TAXPAYER IS MAKING THE DEMINIMIS SAFE HARBOR ELECTION UNDER TREAS. REG. SECTION 1.263(A)-1(F) FOR ALL ELIGIBLE AMOUNTS PAID OR INCURRED DURING THE TAX YEAR.

TY 2020 IRS 990 e-File Render

Name: MARIE LAMFROM CHARITABLE
FOUNDATION TRUST

EIN: 93-1254171

Name of Bond	End of Year Book Value	End of Year Fair Market Value
ABBOTT LABORATOR 2.95%25 DUE 03/15/25	54,800	54,800
ABBVIE INC. 2.9%22 DUE 11/06/22	78,411	78,411
ADOBE INC. 3.25%25 DUE 02/01/25	165,358	165,358
AMGEN INC. 2.25%23 DUE 08/19/23	104,758	104,758
AMAZON.COM, INC. 1.2%27 DUE 06/03/27	305,850	305,850
APPLE INC 2.25%21 DUE 02/23/21	50,028	50,028
BANK OF AMERICA C 3.5%26 DUE 04/19/26	169,911	169,911
BECTON, DICKINS 2.894%22 DUE 06/06/22	52,660	52,660
BIOGEN INC. 3.625%22 DUE 09/15/22	79,118	79,118
BLACKROCK INC 3.375%22 DUE 06/01/22	52,158	52,158
BLACKROCK INC 3.5%24 DUE 03/18/24	109,845	109,845
BNSF, LLC 3.45%21 DUE 09/15/21	40,571	40,571
BOSTON SCIENTIF 3.375%22 DUE 05/15/22	77,051	77,051
BRISTOL-MYERS SQ 0.75%25 DUE 11/13/25	200,259	200,259
CATERPILLAR FINL 0.8%25 DUE 11/13/25	301,109	301,109
CINTAS CORPORATIO 2.9%22 DUE 04/01/22	205,882	205,882
CISCO SYSTEMS INC 2.2%21 DUE 02/28/21	50,153	50,153
CITIGROUP INC 2.9%21 DUE 12/08/21	163,390	163,390
CONSTELLATION BR 4.25%23 DUE 05/01/23	108,903	108,903
DEERE & CO 2.75%25 DUE 04/15/25	108,635	108,635
DIAGEO INVESTME 2.875%22 DUE 05/11/22	206,995	206,995
EDISON INTERNTN 3.875%21 DUE 06/01/21	20,104	20,104
EMERSON ELECTRI 0.875%26 DUE 10/15/26	251,508	251,508
EQUIFAX INC. 3.3%22 DUE 12/15/22	68,059	68,059
ESTEE LAUDER COS 2.35%22 DUE 08/15/22	30,998	30,998
EXXON MOBIL COR 2.222%21 DUE 03/01/21	70,000	70,000
FAMILY DOLLAR STORE 5%21 DUE 02/01/21	50,160	50,160
HOME DEPOT INC 2.7%23 DUE 04/01/23	157,320	157,320
HOME DEPOT INC 2.125%26 DUE 09/15/26	161,762	161,762
HONEYWELL INTERN 1.35%25 DUE 06/01/25	258,859	258,859
ILLINOIS TOOL W 3.375%21 DUE 09/15/21	25,335	25,335
JPMORGAN CHASE 2.972%23 DUE 01/15/23	205,519	205,519
LOCKHEED MARTIN 3.35%21 DUE 09/15/21	114,320	114,320
MARSH & MCLENNAN 3.75%26 DUE 03/14/26	85,115	85,115
MASTERCARD INC 3.375%24 DUE 04/01/24	218,845	218,845
MCDONALD'S CORP 3.35%23 DUE 04/01/23	159,484	159,484
MERCK & CO., INC 2.8%23 DUE 05/18/23	185,485	185,485
MICROSOFT CORP 3.125%25 DUE 11/03/25	111,739	111,739
MIDAMERICAN EMERG 3.5%24 DUE 10/15/24	192,706	192,706
MONDELEZ INTERNTN 1.5%25 DUE 05/04/25	206,996	206,996
MORGAN STANLEY 3.75%23 DUE 02/25/23	107,079	107,079
NEXTERA ENERGY CA 2.8%23 DUE 01/15/23	104,621	104,621

Name of Bond	End of Year Book Value	End of Year Fair Market Value
NIKE, INC. 2.4%25 DUE 03/27/25	215,077	215,077
NVIDIA CORP 2.2%21 DUE 09/16/21	151,825	151,825
NVR, INC. 3.95%22 DUE 09/15/22	105,011	105,011
ORACLE CORP 2.5%25 DUE 04/01/25	134,262	134,262
PACIFICORP 2.95%22 DUE 02/01/22	30,656	30,656
PAYPAL HOLDINGS 2.4%24 DUE 10/01/24	106,863	106,863
PAYPAL HOLDINGS 2.65%26 DUE 10/01/26	219,186	219,186
PEPSICO, INC. 3.6%24 DUE 03/01/24	218,413	218,413
REPUBLIC SERVICES 3.2%25 DUE 03/15/25	109,631	109,631
PNC FINL SVCS GRO 2.6%26 DUE 07/23/26	219,591	219,591
PRAXAIR INC 2.45%22 DUE 02/15/22	76,372	76,372
QUALCOMM INC 2.9%24 DUE 05/20/24	80,628	80,628
RAYTHEON TECHNOL 3.95%25 DUE 08/16/25	172,049	172,049
ROPER TECHNOLOGIE 2.8%21 DUE 12/15/21	76,590	76,590
ROPER TECHNOLOGIE 1%25 DUE 09/15/25	201,347	201,347
TARGET CORP 2.25%25 DUE 04/15/25	134,040	134,040
TARGET CORP 2.5%26 DUE 04/15/26	137,706	137,706
THERMO FISHER SC 2.95%26 DUE 09/19/26	111,343	111,343
TRUIST BANKS 2.45%22 DUE 08/01/22	155,032	155,032
STARBUCKS CORP 3.8%25 DUE 08/15/25	170,686	170,686
STRYKER CORP 3.5%26 DUE 03/15/26	85,028	85,028
SYSCO CORP 2.5%21 DUE 07/15/21	151,457	151,457
THE BOEING CO 2.8%23 DUE 03/01/23	207,430	207,430
THE CLOROX CO 3.05%22 DUE 09/15/22	181,700	181,700
THE GOLDMAN SACHS VAR 21 DUE 04/23/21	50,093	50,093
THE TJX COMPANIE 2.75%21 DUE 06/15/21	30,217	30,217
TRUIST FINL CORP 2.75%22 DUE 04/01/22	102,718	102,718
TYCO ELECTRONICS 3.5%22F DUE 02/03/22	76,929	76,929
U.S. BANCORP 3.7%24 DUE 01/30/24	163,548	163,548
UNITED HEALTH GRO 1.25%26 DUE 01/15/26	307,869	307,869
VERIZON COMMUNICATN 0.85%25 DUE 11/20/25	251,618	251,618
VISA INC 2.8%22 DUE 12/14/22	209,226	209,226
WASTE MANAGEMENT 2.9%22 DUE 09/15/22	31,109	31,109
WEC ENERGY GROUP 2.95%21 DUE 09/15/21	30,339	30,339
WEC ENERGY GROUP 3.55%25 DUE 06/15/25	187,114	187,114

TY 2020 IRS 990 e-File Render

Name: MARIE LAMFROM CHARITABLE
FOUNDATION TRUST

EIN: 93-1254171

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ABBOTT LABORATORIES	124,271	124,271
ADOBE INC	230,055	230,055
ALIBABA GROUP HLDG	141,500	141,500
ALPHABET INC CLASS A	240,112	240,112
ALPHABET INC CLASS C	257,526	257,526
AMAZON COM INC	797,948	797,948
AMGEN INC	162,783	162,783
APPLE INC	1,111,677	1,111,677
APTIV PLC	211,330	211,330
BALL CORP	103,523	103,523
BANK OF AMERICA CORP	264,182	264,182
BERKSHIRE HATHAWAY	278,476	278,476
BOEING CO	140,851	140,851
BOOKING HOLDINGS INC	147,000	147,000
CHEVRON CORPORATION	284,259	284,259
CISCO SYSTEMS INC	203,210	203,210
COMCAST CORP	200,535	200,535
CONSTELLATION BRAND	154,211	154,211
COSTAR GROUP INC	199,645	199,645
COSTCO WHOLESALE CO	331,566	331,566
D R HORTON CO	144,112	144,112
DANAHER CORP	424,065	424,065
ECOLAB INC	267,637	267,637
EOG RESOURCES INC	109,166	109,166
ESTEE LAUDER CO INC	182,074	182,074
FACEBOOK INC	355,108	355,108
FIDELITY NATL INFO	331,582	331,582
FIRST REPUBLIC BANK	267,853	267,853
FORTIVE CORPORATION	168,622	168,622
HOME DEPOT INC	281,557	281,557
HONEYWELL INTL INC	158,674	158,674
INTEL CORP	104,373	104,373
JPMORGAN CHASE & CO	527,595	527,595
JOHNSON & JOHNSON	266,130	266,130
LAM RESEARCH CORP	316,893	316,893
LILLY ELI & CO	204,296	204,296
LINDE PLC	90,648	90,648
L3HARRIS TECHNOLOGIES IN	157,454	157,454
MARSH & MCLENNAN	200,538	200,538
MCDONALDS CORP	192,478	192,478
MEDTRONIC PLC	354,231	354,231
MICROSOFT CORP	921,931	921,931

Name of Stock	End of Year Book Value	End of Year Fair Market Value
MONDELEZ INTL	215,462	215,462
MORGAN STANLEY	374,311	374,311
NETFLIX INC	304,431	304,431
NEXTERA ENERGY INC	408,509	408,509
NIKE INC	108,649	108,649
NVIDIA CORP	230,813	230,813
PALO ALTO NETWORKS	179,827	179,827
PAYPAL HOLDINGS INCO	468,166	468,166
PEPSICO INCORPORATED	148,448	148,448
PFIZER INCORPORATED	156,185	156,185
PPG INDUSTRIES INC	172,631	172,631
PROCTER & GAMBLE	351,746	351,746
PROGRESSIVE CO OHIO	150,693	150,693
RAYTHEON CO	146,667	146,667
SALESFORCE COM	317,773	317,773
SERVICE NOW INC	350,074	350,074
SHERWIN WILLIAMS CO	177,113	177,113
STRYKER CORP	178,389	178,389
THERMO FISHER SCNTFC	341,883	341,883
TRUIST FINL CORP	159,511	159,511
UNION PACIFIC CORP	299,420	299,420
UNITED HEALTH GRP INC	264,763	264,763
VALERO ENERGY CORP	146,516	146,516
VERISK ANALYTICS INC	100,266	100,266
VERIZON COMMUNICATN	217,316	217,316
VISA INC	477,488	477,488
W E C ENERGY GROUP I	153,598	153,598
WALMART INC	308,337	308,337
WALT DISNEY CO	429,034	429,034
WASTE MANAGEMENT INC	140,573	140,573
ZOETIS INC	112,375	112,375

TY 2020 IRS 990 e-File Render

Name: MARIE LAMFROM CHARITABLE
FOUNDATION TRUST

EIN: 93-1254171

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

684,606

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

684,606

**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: MARIE LAMFROM CHARITABLE
FOUNDATION TRUST

EIN: 93-1254171

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
AMERICAN TOWER CORP	FMV	175,528	175,528
DIGITAL REALTY TRUST	FMV	187,641	187,641
EQUINIX INC	FMV	196,399	196,399
PROLOGIS INC	FMV	334,459	334,459
ISHARES CORE S&P MID CAP	FMV	1,540,091	1,540,091
ISHARES MSCI EAFE ETF	FMV	2,147,796	2,147,796
ISHARES RUSSELL 2000 GROWTH ETF (IWO)	FMV	1,595,199	1,595,199
ISHARES RUSSELL 2000 VALUE ETF (IWN)	FMV	1,495,890	1,495,890
ISHARES RUSSELL MID CAP (IWR)	FMV	377,642	377,642
ISHARES RUSSELL MID CAP FORWARD SPLIT (IWP)	FMV	420,557	420,557
VANGUARD FTSE DEVELOPED	FMV	962,140	962,140
VANGUARD FTSE EMERGING	FMV	761,421	761,421
VANGUARD SMALL CAP ETF	FMV	2,000,921	2,000,921
WSDMTRE EMRG MKT EX STT	FMV	334,418	334,418

TY 2020 IRS 990 e-File Render

Name: MARIE LAMFROM CHARITABLE
FOUNDATION TRUST

EIN: 93-1254171

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
LAND	1,410,699	0	1,410,699	1,410,699
LAND IMPROVEMENTS	301,510	82,915	218,595	218,595
BUILDING	1,396,622	286,599	1,110,023	1,110,023
BUILDING IMPROVEMENTS	2,898,201	427,366	2,470,835	2,470,835
EQUIPMENT	230,726	48,962	181,764	181,764

TY 2020 IRS 990 e-File Render

Name: MARIE LAMFROM CHARITABLE
FOUNDATION TRUST

EIN: 93-1254171

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL SERVICES - STOEL RIVES LLP	10,535	0		10,535

TY 2020 IRS 990 e-File Render

Name: MARIE LAMFROM CHARITABLE
FOUNDATION TRUST

EIN: 93-1254171

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BUILDING REPAIR AND MAINTENANCE	3,650	0		3,650
COMPUTER SOFTWARE	12,000	0		12,000
DUES AND SUBSCRIPTIONS	7,218	0		7,218
INSURANCE	6,689	0		6,689
OFFICE EXPENSES	261	0		261
OREGON CHARITABLE REGISTRATION FEES	2,093	0		2,093
ADR PASS-THROUGH FEES	6	6		0

TY 2020 IRS 990 e-File Render

Name: MARIE LAMFROM CHARITABLE
FOUNDATION TRUST

EIN: 93-1254171

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
MISCELLANEOUS INCOME	4,212		4,212
RECOVERY OF PRIOR YEAR GRANT	4,500		4,500

TY 2020 IRS 990 e-File Render

Name: MARIE LAMFROM CHARITABLE
FOUNDATION TRUST

EIN: 93-1254171

Description	Amount
NET UNREALIZED INCREASE IN INVESTMENT VALUE	2,419,951

TY 2020 IRS 990 e-File Render

Name: MARIE LAMFROM CHARITABLE
FOUNDATION TRUST

EIN: 93-1254171

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES - BADGLEY+PHELPS WEALTH MANAGERS	71,864	71,864		0
INVESTMENT MANAGEMENT FEES - BARWICK & PARTNERS, INC.	48,370	48,370		0
PUBLIC RELATIONS - LAWRENCE PUBLIC RELATIONS	46,125	0		46,125

TY 2020 IRS 990 e-File Render

Name: MARIE LAMFROM CHARITABLE
FOUNDATION TRUST

EIN: 93-1254171

Name	Address
GERTRUDE BOYLE TRUST	9740 SW HILLMAN COURT SUITE 200 WILSONVILLE, OR 97070

TY 2020 IRS 990 e-File Render

Name: MARIE LAMFROM CHARITABLE
FOUNDATION TRUST

EIN: 93-1254171

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL EXCISE TAXES	26,292	0		0
FOREIGN INVESTMENT TAXES	2,878	2,878		0