

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. 1545-0047

2023

Open to Public Inspection

For calendar year 2023, or tax year beginning 01-01-2023 , and ending 12-31-2023

Name of foundation MICHAEL TUCH FOUNDATION INC		A Employer identification number 13-6002848	
Number and street (or P.O. box number if mail is not delivered to street address) 124 SOUTH PINE AVE		Room/suite	
City or town, state or province, country, and ZIP or foreign postal code ALBANY, NY 12208		B Telephone number (see instructions) (518) 727-2010	
G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		C If exemption application is pending, check here ☐ 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 ☐ F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶\$ 6,241,172		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)	98,738			
	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	242,723	241,122		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	407,767			
	b Gross sales price for all assets on line 6a 3,607,651				
	7 Capital gain net income (from Part IV, line 2)		407,767		
	8 Net short-term capital gain			0	
	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)	3,642			
	12 Total. Add lines 1 through 11	752,870	648,889		
	13 Compensation of officers, directors, trustees, etc.	16,623	4,156		12,467
	14 Other employee salaries and wages		0	0	0
	15 Pension plans, employee benefits		0	0	
	16a Legal fees (attach schedule)				0
	b Accounting fees (attach schedule)	1,050	0	0	1,050
	c Other professional fees (attach schedule)	35,994	35,994		0
	17 Interest				0
	18 Taxes (attach schedule) (see instructions)	6,378	2,726		0
	19 Depreciation (attach schedule) and depletion	0	0		
	20 Occupancy				
	21 Travel, conferences, and meetings		0	0	
	22 Printing and publications		0	0	
	23 Other expenses (attach schedule)	3,351	759		2,592
	24 Total operating and administrative expenses. Add lines 13 through 23	63,396	43,635	0	16,109
	25 Contributions, gifts, grants paid	632,000			632,000
	26 Total expenses and disbursements. Add lines 24 and 25	695,396	43,635	0	648,109
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	57,474			
	b Net investment income (if negative, enter -0-)		605,254		
	c Adjusted net income (if negative, enter -0-)			0	

Part II		Balance Sheets	Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)	Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing		1,862	6,404	6,404
	2	Savings and temporary cash investments		444,541		
	3	Accounts receivable ▶ _____				
		Less: allowance for doubtful accounts ▶ _____			0	0
	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 ▶ _____ 0				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments—U.S. and state government obligations (attach schedule)				
	b	Investments—corporate stock (attach schedule)				
	c	Investments—corporate bonds (attach schedule)				
	11	Investments—land, buildings, and equipment: basis ▶ _____				
	Less: accumulated depreciation (attach schedule) ▶ _____					
12	Investments—mortgage loans					
13	Investments—other (attach schedule)		4,924,449	5,419,614	6,234,768	
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)		5,370,852	5,426,018	6,241,172	
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	
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		5,370,852	5,426,018	
	27	Paid-in or capital surplus, or land, bldg., and equipment fund				
28	Retained earnings, accumulated income, endowment, or other funds					
29	Total net assets or fund balances (see instructions)		5,370,852	5,426,018		
30	Total liabilities and net assets/fund balances (see instructions) .		5,370,852	5,426,018		

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	5,370,852
2	Enter amount from Part I, line 27a	2	57,474
3	Other increases not included in line 2 (itemize) ▶ _____	3	834
4	Add lines 1, 2, and 3	4	5,429,160
5	Decreases not included in line 2 (itemize) ▶ _____	5	3,142
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29.	6	5,426,018

(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.)

1 a 83. AT&T INC			D—Donation	2020-06-12	2023-03-27
b 1916. AT&T INC					2023-10-04
c 36. ABBOTT LABORATORIES COM				2019-05-10	2023-03-27
d 727. ABBOTT LABORATORIES COM					2023-10-04
e 200. ALPHABET INC				2020-10-01	2023-01-06
14. AMERICAN WATER WORKS CO INC				2020-06-12	2023-03-27
199. AMERICAN WATER WORKS CO INC				2020-06-12	2023-10-04
646. AMPHENOL CORP					2023-10-04
529. AUTOMATIC DATA PROCESSING INC					2023-03-07
3330. BANK OF AMERICA CORP					2023-10-04
6. BROADCOM INC				2021-01-13	2023-03-27
83. BROADCOM INC					2023-10-04
346. CME GROUP INC					2023-10-04
2501. CAMECO CORP				2021-05-07	2023-10-04
30. CHEVRON CORP				2020-06-12	2023-03-27
236. CHEVRON CORP					2023-10-04
55. CISCO SYS INC COM				2019-01-17	2023-03-27
378. CISCO SYS INC COM				2019-01-17	2023-10-04
35000. CISCO SYSTEMS INCOTD 3/3/2014 3.62500% 3				2023-03-31	2023-08-15
47. COMCAST CORP CL A					2023-03-27
324. COMCAST CORP CL A				2021-01-13	2023-10-04
13. CROWN CASTLE INTERNATIONAL CORP				2020-06-12	2023-03-27
275. CROWN CASTLE INTERNATIONAL CORP					2023-10-04
15. DOLLAR GENERAL CORP				2021-01-13	2023-03-27
191. DOLLAR GENERAL CORP					2023-10-04
65. DOMINION RES INC VA NEW				2023-01-06	2023-10-04
330. DOMINION RES INC VA NEW				2020-10-21	2023-10-04
130. HESS CORP				2022-11-18	2023-10-04
8. HOME DEPOT INC				2021-01-13	2023-03-27
165. HOME DEPOT INC					2023-10-04
14. HONEYWELL INTERNATIONAL INC				2021-01-13	2023-03-27
161. HONEYWELL INTERNATIONAL INC					2023-10-04
67. HUBBELL INC					2023-10-04
6150. ISHARES S&P US PREFERRED STOCK CLOSED-END FUND					2023-10-24
245000. JPMORGAN CHASE & CODTD 5/22/2008 6.40000				2009-05-07	2023-08-15
18. JOHNSON & JOHNSON				2020-07-30	2023-03-27
66. JOHNSON & JOHNSON					2023-10-04
48. JOHNSON & JOHNSON				2003-03-04	2023-10-04
.11 KENVUE INC				2019-05-10	2023-09-11
64. KRAFT HEINZ CO				2020-07-28	2023-03-27
966. KRAFT HEINZ CO					2023-10-04
11. MCDONALDS CORP				2020-10-01	2023-03-27
222. MCDONALDS CORP					2023-10-04
200000. METLIFE INCOTD 6/3/2004 6.37500% 6/15/20				2010-02-12	2023-08-15
358. MOLSON COORS BREWING CO				2022-11-18	2023-10-04
26. NEXTERA ENERGY INC				2020-06-12	2023-03-27
593. NEXTERA ENERGY INC					2023-10-04
7. PARKER HANNIFIN CORP COM				2021-01-13	2023-03-27
102. PARKER HANNIFIN CORP COM					2023-10-04
33. PEPSICO INC CAP				2000-04-04	2023-03-27
349. PEPSICO INC CAP				2000-04-04	2023-10-04
19. PROCTER & GAMBLE CO COM				2020-07-30	2023-03-27
268. PROCTER & GAMBLE CO COM					2023-10-04
17. PROLOGIS INC				2020-06-12	2023-03-27
331. PROLOGIS INC				2020-06-12	2023-10-04
792. PRUDENTIAL FINANCIAL INC					2023-10-04
27. RAYTHEON TECHNOLOGIES CORP				2020-06-12	2023-03-27
523. RAYTHEON TECHNOLOGIES CORP					2023-10-04
235000. REALTY INCOME CORP				2022-11-03	2023-08-22
14. REPUBLIC SERVICES INC					2023-03-27
249. REPUBLIC SERVICES INC					2023-10-04
300000. ROYAL BANK OF CANADA				2022-11-03	2023-08-15
100000. SOCIETE GENERALE				2022-09-28	2023-10-03
200000. TRANSCANADA PIPELINES LTDDTD 3/20/2006 5				2010-02-12	2023-08-15
100000. UNITED STATES TREAS BILLS				2022-09-27	2023-03-30
100000. UNITED STATES TREAS NTSDTD 9/30/2016 1.3				2022-09-27	2023-07-21
5. UNITEDHEALTH GROUP INC				2022-01-03	2023-03-27
94. UNITEDHEALTH GROUP INC				2022-01-03	2023-10-04
815. VIACOMCBS INC				2022-11-18	2023-10-04
165. VULCAN MATERIALS CO COM				2022-11-18	2023-10-04
20. WALMART STORES INC				2020-07-28	2023-03-27
369. WALMART STORES INC					2023-10-04
719. WELLS FARGO & COMPANY				2022-01-03	2023-10-04
12. WEST PHARMACEUTICAL SERVICES INC				2020-06-30	2023-03-27
195. WEST PHARMACEUTICAL SERVICES INC					2023-10-04
143. WHEATON PRECIOUS METALS CORP				2023-01-06	2023-10-04
264. WHEATON PRECIOUS METALS CORP				2020-07-28	2023-10-04
170000. WYETH L L CDTD 11/14/2005 6.00000% 2/15/				2009-04-22	2023-08-15
20. XYLEM INC				2020-06-12	2023-03-27
293. XYLEM INC				2020-06-12	2023-10-04
CAPITAL GAIN DIVIDENDS		P			
CAPITAL GAIN DIVIDENDS		P			
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[illegible][illegible]

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	8,413
4	Substitute 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	8,413
6	Credits/Payments:			
a	2023 estimated tax payments and 2022 overpayment credited to 2023	6a	6,008	
b	Exempt foreign organizations—tax withheld at source	6b	0	
c	Tax paid with application for extension of time to file (Form 8868)	6c	2,416	
d	Backup withholding erroneously withheld			
7	Total credits and payments. Add lines 6a through 6d	7	8,424	
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.			
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	11

Part VI-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 the instructions for the definition.			No
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c	Did the foundation file Form 1120-POL for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ (2) On foundation managers. \$			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: By language in the governing instrument, or By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XIV.	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) NY			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2023 or the taxable year beginning in 2023? See the instructions for Part XIII. If "Yes," complete Part XIII	9		No
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.	10		No
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	13	Yes	
14	The books are in care of KEYBANK NA Telephone no. (216) 813-4548 Located at 4900 TIEDEMAN RD OH-01-49-0381 BROOKLYN OH ZIP+4 44144			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here and enter the amount of tax-exempt interest received or accrued during the year	15		
16	At any time during calendar year 2023, 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 country	16	Yes	No

Part VI-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.

- 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?
- (2)** Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?
- (3)** Furnish goods, services, or facilities to (or accept them from) a disqualified person?
- (4)** Pay compensation to, or pay or reimburse the expenses of, a disqualified person?
- (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)?
- (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.)
- 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
- c** Organizations relying on a current notice regarding disaster assistance check here.  
- d** 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 2023?
- 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 2023, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2023?
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.)
- 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?
- b** If "Yes," did it have excess business holdings in 2023 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 2023.)
- 4a** Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?
- 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 2023?

	Yes	No
1a(1)		No
1a(2)		No
1a(3)		No
1a(4)	Yes	
1a(5)		No
1a(6)		No
1b		No
1d		No
2a		No
2b		
3a		No
3b		
4a		No
4b		No

Part VI-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))?

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

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

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

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

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

c Organizations relying on a current notice regarding disaster assistance check

d 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?
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?

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?
If "Yes" to 6b, file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

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

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
5a(1)		No
5a(2)		No
5a(3)		No
5a(4)		No
5a(5)		No
5b		
5d		
6a		No
6b		No
7a		No
7b		
8		No

Part VII

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
MARTHA TUCK ROZETT 124 SOUTH PINE AVE ALBANY, NY 12208	PRESIDENT 1	16,623		
JONATHAN S TUCK 124 SOUTH PINE AVE ALBANY, NY 12208	VICE PRESIDENT 1	0		
JOSHUA S ROZETT 124 SOUTH PINE AVE ALBANY, NY 12208	SECRETARY 1	0		
JOHN M ROZETT 124 SOUTH PINE AVE ALBANY, NY 12208	TREASURER 1	0		
DANIEL H TUCK 124 SOUTH PINE AVE ALBANY, NY 12208	DIRECTOR 1	0		
ALEXANDER TUCK ROZETT 124 SOUTH PINE AVE ALBANY, NY 12208	DIRECTOR 1	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 VII

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
NONE		

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

0

Part VIII- 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 VIII- Summary of Program-Related Investments (see instructions)

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

Part IX 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	5,703,428
b	Average of monthly cash balances.	1b	473,571
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	6,176,999
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	6,176,999
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions).	4	92,655
5	Net value of noncharitable-use assets. Subtract line 4 from line 3.. . . .	5	6,084,344
6	Minimum investment return. Enter 5% (0.05) of line 5.	6	304,217

Part X 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 IX, line 6.	1	304,217
2a	Tax on investment income for 2022 from Part V, line 5.	2a	8,413
b	Income tax for 2022. (This does not include the tax from Part V.).	2b	
c	Add lines 2a and 2b.	2c	8,413
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	295,804
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	295,804
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 XII, line 1. . . .	7	295,804

Part XI 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	648,109
b	Program-related investments—total from Part VIII-B	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	0
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part XII, line 4.. . . .	4	648,109

Part XII

Undistributed Income (see instructions)

		(a) Corpus	(b) Years prior to 2022	(c) 2022	(d) 2023
1 Distributable amount for 2023 from Part X, line 7					295,804
2 Undistributed income, if any, as of the end of 2022:					
a Enter amount for 2022 only.				0	
b Total for prior years: 20 __, 20 __, 20 __			0		
3 Excess distributions carryover, if any, to 2022:					
a From 2018.		84,008			
b From 2019.		121,641			
c From 2020.		181,706			
d From 2021.		208,654			
e From 2022.		244,806			
f Total of lines 3a through e.		840,815			
4 Qualifying distributions for 2023 from Part XI, line 4: ▶ \$ 648,109					
a Applied to 2022, 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 2023 distributable amount					295,804
e Remaining amount distributed out of corpus		352,305			
5 Excess distributions carryover applied to 2023. (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		1,193,120			
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 2022. Subtract line 4a from line 2a. Taxable amount—see instructions.				0	
f Undistributed income for 2023. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2024					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 2018 not applied on line 5 or line 7 (see instructions)		84,008			
9 Excess distributions carryover to 2024. Subtract lines 7 and 8 from line 6a		1,109,112			
10 Analysis of line 9:					
a Excess from 2019		121,641			
b Excess from 2020		181,706			
c Excess from 2021.		208,654			
d Excess from 2022		244,806			
e Excess from 2023		352,305			

a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2023, 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)

Form **990-PF** (2023)

Part

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				
MINT THEATER COMPANY 412 W 42ND ST NEW YORK,NY 10036	NONE	P C	GENERAL OPERATING	10,000
THEATRE FOR A NEW AUDIENCE 262 ASHLAND PL BROOKLYN,NY 11217	NONE	P C	GENERAL OPERATING	10,000
SYMPHONY SPACE UPPER LEVEL 2537 BROADWAY NEW YORK,NY 10025	NONE	P C	GENERAL OPERATING	10,000
S'COOL SOUNDS 111 2ND PL BROOKLYN,NY 11231	NONE	P C	GENERAL OPERATING	10,000
ROUNABOUT THEATRE COMPANY 231 W 39TH ST NEW YORK,NY 10018	NONE	P C	GENERAL OPERATING	10,000
GINGOLD THEATRICAL GROUP 520 8TH AVE RM 304 NEW YORK,NY 100188641	NONE	P C	GENERAL OPERATING	10,000
RED BULL THEATER 191 7TH AVE 2S NEW YORK,NY 10011	NONE	P C	GENERAL OPERATING	15,000
NEW YORK THEATRE WORKSHOP 79 E 4TH ST NEW YORK,NY 10003	NONE	P C	GENERAL OPERATING	7,500
TEATRO CIRCULO 64 E 4TH ST NEW YORK,NY 10003	NONE	P C	GENERAL OPERATING	5,000
BROOKLYN YOUTH CHORUS ACADEMY INC 179 PACIFIC ST BROOKLYN,NY 112016213	NONE	P C	GENERAL OPERATING	12,500
NEW YORK CITY CENTER 131 W 55TH ST NEW YORK,NY 10019	NONE	P C	GENERAL OPERATING	8,000
LINCOLN CENTER THEATER 150 W 65TH ST NEW YORK,NY 10023	NONE	P C	GENERAL OPERATING	10,000
MUSEUM OF THE CITY OF NEW YORK 1220 5TH AVE NEW YORK,NY 100295221	NONE	P C	GENERAL OPERATING	5,000
NEW YORK HISTORICAL SOCIETY 170 CENTRAL PARK W NEW YORK,NY 100245152	NONE	P C	GENERAL OPERATING	10,000
NEW YORK BOTANICAL GARDEN 2900 SOUTHERN BLVD BRONX,NY 104585126	NONE	P C	GENERAL OPERATING	10,000
THE PAPER BAG PLAYERS INC	NONE	P C	GENERAL OPERATING	5,000

131 VARICK ST RM 1001 NEW YORK,NY 100131417				
THE PALEY CENTER FOR MEDIA 25 WEST 52 STREET NEW YORK,NY 100196104	NONE	P C	GENERAL OPERATING	8,000
ATLANTIC THEATER COMPANY 336 W 20TH ST NEW YORK,NY 100113302	NONE	P C	GENERAL OPERATING	8,000
MUSEUM OF JEWISH HERITAGE A LIVING MEMOR 36 BATTERY PL NEW YORK,NY 102801502	NONE	P C	GENERAL OPERATING	5,000
MUSEUM AT ELDRIDGE STREET 12 ELDRIDGE ST NEW YORK,NY 100026204	NONE	P C	GENERAL OPERATING	10,000
LOWER EAST SIDE TENEMENT MUSEUM 103 ORCHARD ST 4TH FL NEW YORK,NY 100023102	NONE	P C	GENERAL OPERATING	8,000
HUDSON VALLEY SHAKESPEARE FESTIVAL INC PO BOX 125 GARRISON,NY 105240125	NONE	P C	GENERAL OPERATING	5,000
YOUTH JUSTICE NETWORK INC 63 W 125TH STREET NEW YORK,NY 100274590	NONE	P C	GENERAL OPERATING	5,000
ANSONIA MUSIC OUTREACH ORGANIZATION INC 330 WADSWORTH AVE APT 2G NEW YORK,NY 100404137	NONE	P C	GENERAL OPERATING	5,000
CLASSICAL THEATRE OF HARLEM 8 W 126TH ST NEW YORK,NY 100273811	NONE	P C	GENERAL OPERATING	5,000
SOCIETY OF THE THIRD STREET MUSIC SCHOOL 235 E 11TH ST NEW YORK,NY 100037305	NONE	P C	GENERAL OPERATING	15,000
BROOKLYN BOTANIC GARDEN CORP TRUST UW E CO FIDUCIARY TR CO 280 PARK AVENUE NEW YORK,NY 100170000	NONE	P C	GENERAL OPERATING	10,000
JEWISH MUSEUM 1109 5TH AVE NEW YORK,NY 101280118	NONE	P C	GENERAL OPERATING	7,000
DOROT 171 W 85TH ST NEW YORK,NY 10024	NONE	P C	GENERAL OPERATING	7,500
CLASSIC STAGE COMPANY 136 E 13TH ST NEW YORK,NY 10003	NONE	P C	GENERAL OPERATING	8,000
CITY PARKS FOUNDATION 830 5TH AVE NEW YORK,NY 10065	NONE	P C	GENERAL OPERATING	5,000
CITY ARTS 77 BLEECKER ST SUITE C2-18 NEW YORK,NY 10012	NONE	P C	GENERAL OPERATING	15,000

PHOENIX THEATRE ENSEMBLE INC 200 EAST 10TH STREET 180 NEW YORK,NY 100037702	NONE	P C	GENERAL OPERATING	5,000
DEVELOPING ARTISTS THEATER COMPANY INC 22 E 30TH ST NEW YORK,NY 100167002	NONE	P C	GENERAL OPERATIONS	5,000
SECOND STAGE 1501 BROADWAY SUITE 518 NEW YORK,NY 10036	NONE	P C	GENERAL OPERATING	12,000
PUBLICOLOR 20 W 36TH ST 9TH FLOOR NEW YORK,NY 10018	NONE	P C	GENERAL OPERATING	25,000
EPIC THEATRE ENSEMBLE 410 W 42ND ST 4 NEW YORK,NY 10036	NONE	P C	GENERAL OPERATING	15,000
FIASCO THEATER PO BOX 291 NEW YORK,NY 102760291	NONE	P C	GENERAL OPERATING	25,000
QUEENS BOTANICAL GARDEN 43-50 MAIN ST FLUSHING,NY 11355	NONE	P C	GENERAL OPERATING	8,000
MANHATTAN THEATRE CLUB 311 WEST 43RD ST 8TH FLOOR NEW YORK,NY 10036	NONE	P C	GENERAL OPERATING	12,000
IRISH REPERTORY THEATRE 132 WEST 22ND STREET NEW YORK,NY 10011	NONE	P C	GENERAL OPERATING	15,000
INTREPID SEA AIR AND SPACE MUSEUM PIER 86 W 46TH ST NEW YORK,NY 10036	NONE	P C	GENERAL OPERATING	7,000
FUTURES AND OPTIONS 120 BROADWAY 1019 NEW YORK,NY 10271	NONE	P C	GENERAL OPERATING	5,000
EDUCATION THROUGH MUSIC 122 E 42ND ST 1501 NEW YORK,NY 10168	NONE	P C	GENERAL OPERATING	15,000
YORK THEATER COMPANY 619 LEXINGTON AVE NEW YORK,NY 10022	NONE	P C	GENERAL OPERATING	7,000
WORKING THEATER 520 8TH AVE NEW YORK,NY 10018	NONE	P C	GENERAL OPERATING	5,000
WATERFRONT MUSEUM 290 CONOVER ST BROOKLYN,NY 11231	NONE	P C	GENERAL OPERATING	10,000
URBAN STAGES 259 W 30TH ST NEW YORK,NY 10001	NONE	P C	GENERAL OPERATING	10,000
SEARCH AND CARE 1844 2ND AVE NEW YORK,NY 10128	NONE	P C	GENERAL OPERATING	12,000
JAZZ PASSENGERS MUSIC PROJECTS	NONE	P C	GENERAL OPERATING	5,000

410 W 24TH ST APT 14L NEW YORK,NY 100111308				
NATIONAL DANCE INSTITUTE 217 W 147TH ST NEW YORK,NY 10039	NONE	P C	GENERAL OPERATING	10,000
KAUFMAN MUSIC CENTER 129 W 67TH ST NEW YORK,NY 10023	NONE	P C	GENERAL OPERATING	7,500
THE HOPE PROGRAM 1 SMITH ST 4TH FLOOR BROOKLYN,NY 11201	NONE	P C	GENERAL OPERATING	10,000
CORA DANCE 358 VAN BRUNT ST BROOKLYN,NY 11231	NONE	P C	GENERAL OPERATING	5,000
BALLET TECH 890 BROADWAY NEW YORK,NY 10003	NONE	P C	GENERAL OPERATING	7,000
AVENUES FOR JUSTICE 100 CENTRE STREET ROOM 1541 NEW YORK,NY 10013	NONE	P C	GENERAL OPERATING	20,000
STATEN ISLAND MUSEUM 1000 RICHMOND TERRACE STATEN ISLAND,NY 10301	NONE	P C	GENERAL OPERATING	5,000
PROSPECT THEATER COMPANY INC 520 EIGHTH AVE 3RD FLOOR SUITE 307 NEW YORK,NY 100188643	NONE	P C	GENERAL OPERATING	10,000
ST ANN'S WAREHOUSE 45 WATER ST BROOKLYN,NY 11201	NONE	P C	GENERAL OPERATING	10,000
NEW YORK CLASSICAL THEATRE 64 FULTON ST 1108 NEW YORK,NY 10038	NONE	P C	GENERAL OPERATING	10,000
HARLEM CHILDREN'S ZONE 35 EAST 125TH ST NEW YORK,NY 10035	NONE	P C	GENERAL OPERATING	15,000
GREEN GUERILLAS 30 THIRD AVE ROOM 848 BROOKLYN,NY 11217	NONE	P C	GENERAL OPERATING	5,000
BROOKLYN CONSERVATORY OF MUSIC 58 7TH AVE BROOKLYN BROOKLYN,NY 11217	NONE	P C	GENERAL OPERATING	7,500
BROOKLYN MUSEUM 200 EASTERN PKWY BROOKLYN,NY 11238	NONE	P C	GENERAL OPERATING	5,000
BROOKLYN PUBLIC LIBRARY 128 PIERREPONT ST BROOKLYN,NY 11201	NONE	P C	GENERAL OPERATING	7,500
LEAP 535 8TH AVE SUITE 1100 NEW YORK,NY 10018	NONE	P C	GENERAL OPERATING	10,000
METROPOLITAN MUSEUM OF ARTS 1000 5TH AVE	NONE	P C	GENERAL OPERATING	5,000

NEW YORK, NY 10028				
NEW YORK CITY CHILDRENS THEATER	NONE	P C	GENERAL OPERATING	10,000
340 EAST 46TH ST NEW YORK CITY,NY 10017				
Total			▶ 3a	632,000
b Approved for future payment				
Total			▶ 3b	

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions.)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue:						
a _____						
b _____						
c _____						
d _____						
e _____						
f _____						
g Fees and contracts from government agencies						
2 Membership dues and assessments						
3 Interest on savings and temporary cash investments						
4 Dividends and interest from securities . . .				14	242,723	
5 Net rental income or (loss) from real estate:						
a Debt-financed property.						
b Not debt-financed property.						
6 Net rental income or (loss) from personal property						
7 Other investment income						
8 Gain or (loss) from sales of assets other than inventory				18	407,767	
9 Net income or (loss) from special events:						
10 Gross profit or (loss) from sales of inventory						
11 Other revenue:						
a TAX REFUND _____					3,642	
b _____						
c _____						
d _____						
e _____						
12 Subtotal. Add columns (b), (d), and (e) . .					654,132	
13 Total. Add line 12, columns (b), (d), and (e).				13		654,132

(See worksheet in line 13 instructions to verify calculations.)

[illegible]

Part XVI

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

a Transfers from the reporting foundation to a noncharitable exempt organization of:

(1) Cash.

(2) Other assets.

b Other transactions:

(1) Sales of assets to a noncharitable exempt organization.

(2) Purchases of assets from a noncharitable exempt organization

(3)* Rental of facilities, equipment, or other assets.

(4) Reimbursement arrangements.

(5) Loans or loan guarantees. . . .

(6) Performance of services or membership or fundraising solicitations.

c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.

d If the answer to any of the above is "Yes," complete the following schedule. Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received.

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule.

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

Sign Here

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

	2024-06-03
Signature of officer or trustee	Date

Title

May the IRS discuss this return with the preparer shown below?
See instructions. ☐ Yes ☐ No

**Paid
Preparer
Use Only**

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☒	PTIN
	JEFFREY E KUHLLIN		2024-06-03		P00353001
	Firm's name ▶ PWC US TAX LLP				Firm's EIN ▶ 92-046058
	Firm's address ▶ 4300 E CAMELBACK ROAD STE 475 PHOENIX, AZ 85018				Phone no. (412) 355-6000

Additional Data

Return to Form

Software ID:

Software Version:

Form 990PF - Special Condition Description:

Special Condition Description

Schedule B (Form 990) 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
		2023
Name of the organization MICHAEL TUCH FOUNDATION INC		Employer identification number 13-6002848

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 MICHAEL TUCH FOUNDATION INC	Employer identification number 13-6002848
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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	TUCH UW MICHAEL TUCH PARAGRAPH SEVENTH C/O KEYBANK 4900 TIEDEMAN RD BROOKLYN, OH 44144	\$ 98,738	☒ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
-		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)

Name of organization MICHAEL TUCH FOUNDATION INC	Employer identification number 13-6002848
---	--

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 MICHAEL TUCH FOUNDATION INC	Employer identification number 13-6002848
---	--

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

Additional Data

[Return to Form](#)

Software ID:

Software Version:

TY 2023 IRS 990 e-File Render

Name: MICHAEL TUCH FOUNDATION INC
EIN: 13-6002848

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREPARATION FEE (NON- ALLOC	1,050			1,050

Name:

MICHAEL TUCH FOUNDATION INC

EIN:

13-6002848

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
00206R102 AT&T INC			
023135106 AMAZON COM INC			
030420103 AMERICAN WATER WORKS			
032095101 AMPHENOL CORP			
053015103 AUTOMATIC DATA PROCE			
060505104 BANK OF AMERICA CORP			
11135F101 BROADCOM INC	AT COST	11,225	33,488
12572Q105 CME GROUP INC			
17275R102 CISCO SYS INC	AT COST	15,572	17,783
20030N101 COMCAST CORP	AT COST	28,472	31,572
22822V101 CROWN CASTLE INTERNA			
231021106 CUMMINS INC	AT COST	24,795	26,592
254687106 WALT DISNEY CO			
254709108 DISCOVER FINANCIAL S			
256677105 DOLLAR GENERAL CORP			
437076102 HOME DEPOT INC			
438516106 HONEYWELL INTERNATIO	AT COST	8,858	14,260
443510607 HUBBELL INC			
458140100 INTEL CORP			
464287804 ISHARES CORE S&P SMA			
464288687 ISHARES S&P US PREFE			
478160104 JOHNSON & JOHNSON	AT COST	10,496	31,505
580135101 MCDONALDS CORP			
609207105 MONDELEZ INTERNATIONAL			
67066G104 NVIDIA CORP			
701094104 PARKER HANNIFIN CORP			
713448108 PEPSICO INC	AT COST	12,579	57,406
742718109 PROCTER & GAMBLE CO	AT COST	11,772	19,050
74340W103 PROLOGIS INC			
760759100 REPUBLIC SERVICES IN			
500754106 KRAFT HEINZ CO			
89352HAB5 TRANSCANADA PIPELINE			
921943858 VANGUARD FTSE DEV MK			
931142103 WALMART INC			
166764100 CHEVRON CORP	AT COST	33,941	55,935
74256W584 PRINCIPAL MIDCAP FUN			
46625HHF0 JPMORGAN CHASE & COD			
65339F101 NEXTERA ENERGY INC			
690742101 OWENS CORNING INC			
824348106 SHERWIN WILLIAMS CO			
957663503 WESTERN ASSET CORE P			
131649774 CALVERT EMG MKTS EQU			
291011104 EMERSON ELEC CO			
46625H100 JP MORGAN CHASE & CO	AT COST	92,461	162,275
552983470 MFS RESEARCH INTERNA			
75513E101 RAYTHEON TECHNOLOGIE			
744320102 PRUDENTIAL FINANCIAL			
02079K305 ALPHABET INC			
25746U109 DOMINION ENERGY INC			
592905509 METROPOLITAN WEST T/			
594918104 MICROSOFT CORP	AT COST	27,041	541,122
72201U638 PIMCO MORTGAGE OPP &			
883556102 THERMO FISHER SCIENT			
983024AL4 WYETH L L CDTD 11/14			
98419M100 XYLEM INC			
998143905 KEYBANK DEPOSIT SWEE	AT COST	584,053	584,053
002824100 ABBOTT LABS			
13321L108 CAMECO CORP			
46138G805 INVESCO TAXABLE MUNI			
49456B101 KINDER MORGAN INC	AT COST	18,724	20,815
962879102 WHEATON PRECIOUS MET			
97717W505 WISDOMTREE U.S. MIDC	AT COST	223,853	240,832
46653M849 JOHCM INTERNATIONAL			
955306105 WEST PHARMACEUTICAL			
59156RAJ7 METLIFE INCDTD 6/3/2			
N53745100 LYONDELLBASELL INDUS			
037833100 APPLE INC			
33939L837 FLEXSHARES INT QUALI	AT COST	390,349	342,923
464286319 ISHARES EMERGING MAR	AT COST	100,236	65,722
808524797 SCHWAB US DIVIDEND E	AT COST	225,230	222,604
912796YM5 UNITED STATES TREAS			
91324P102 UNITEDHEALTH GROUP I			
186854204 CLIFFWATER CORP LEND	AT COST	199,198	198,496
60871R209 MOLSON COORS BREWING			
912828T26 UNITED STATES TREAS			
78016FZU1 ROYAL BANK OF CANADA			
929160109 VULCAN MATERIALS CO			
33939L860 FLEXSHARES QUALITY D	AT COST	167,018	186,005
756109BE3 REALTY INCOME CORP	AT COST	63,225	64,579
949746101 WELLS FARGO CO			
42809H107 HESS CORP			
83369NUV0 SOCIETE GENERALE			
92556H206 VIACOMCBS INC			
97717W604 WISDOMTREE U.S. SMAL	AT COST	218,503	235,356
00287Y109 ABBVIE INC	AT COST	18,791	19,836
020002101 ALLSTATE CORP	AT COST	18,997	24,077
031162100 AMGEN INC	AT COST	25,065	27,362
036752103 ANTHEM INC	AT COST	19,166	20,749
06051GFM6 BANK OF AMERICA CORP	AT COST	68,028	69,057
063671101 BANK OF MONTREAL	AT COST	30,016	37,201
093671105 BLOCK H & R INC	AT COST	18,521	21,380
110122108 BRISTOL-MYERS SQUIBB	AT COST	18,641	16,932
126650100 CVS HEALTH CORPORATI	AT COST	24,985	28,899
134429109 CAMPBELL SOUP CO	AT COST	12,423	13,445
166764BW9 CHEVRON CORP	AT COST	65,613	67,120
17275RAN2 CISCO SYSTEMS INCDTD	AT COST	64,311	64,790
172967HB0 CITIGROUP INCDTD 9/1	AT COST	66,435	67,305
219350105 CORNING INC	AT COST	31,129	31,729
237194105 DARDEN RESTAURANTS I	AT COST	30,862	35,982
24422EXD6 JOHN DEERE CAPITAL C	AT COST	74,942	76,351
26441CBV6 DUKE ENERGY CORP	AT COST	67,318	68,125
30231G102 EXXON MOBIL CORP	AT COST	18,156	16,297
3130AWUM0 FEDERAL HOME LN BANK	AT COST	80,000	79,876
3130AXGT9 FEDERAL HOME LOAN BA	AT COST	104,958	105,182
370334104 GENERAL MLS INC	AT COST	12,393	12,833
375558103 GILEAD SCIENCES INC	AT COST	18,512	20,253
38141G104 GOLDMAN SACHS GROUP	AT COST	17,759	22,375
40434L105 HP INC	AT COST	25,833	29,909
438127AA0 HONDA MOTOR CO LTD	AT COST	66,870	67,840
46647PDM5 JPMORGAN CHASE & CO	AT COST	67,660	68,044
487836108 KELLOGG CO	AT COST	22,434	23,650
49177J102 KENVUE INC	AT COST	28,797	40,670
494368103 KIMBERLY CLARK CORP	AT COST	25,265	25,517
52736R102 LEVI STRAUSS & CO	AT COST	18,755	22,924
539830109 LOCKHEED MARTIN CORP	AT COST	24,378	27,648
553530106 MSC INDL DIRECT INC	AT COST	19,294	19,746
636180101 NATIONAL FUEL GAS CO	AT COST	30,987	30,855
64110D104 NETAPP INC	AT COST	31,307	36,851
69047Q102 OVINTIV INC	AT COST	11,801	11,858
695156109 PACKAGING CORP OF AM	AT COST	24,943	26,554
704326107 PAYCHEX INC	AT COST	25,474	26,442
713448FQ6 PEPSICO INC	AT COST	69,327	70,280
718546104 PHILLIPS 66	AT COST	11,766	14,246
74144T108 T ROWE PRICE GROUP I	AT COST	30,470	32,415
747525103 QUALCOMM INC	AT COST	18,678	24,732
783549108 RYDER SYS INC	AT COST	17,668	20,136
80282KAE6 SANTANDER HOLDINGS U	AT COST	48,798	49,420
854502101 STANLEY BLACK & DECK	AT COST	23,482	29,528
882508104 TEXAS INSTRS INC	AT COST	24,863	26,933
89114QCP1 TORONTO-DOMINION BAN	AT COST	66,956	69,278
902494103 TYSON FOODS INC	AT COST	12,180	13,545
911312106 UNITED PARCEL SERVIC	AT COST	49,958	51,257
911312BL9 UNITED PARCEL SERVIC	AT COST	67,820	68,615
9128283Z1 UNITED STATES TREAS	AT COST	67,549	68,499
912828Y79 UNITED STATES TREAS	AT COST	83,598	84,923
91282CDB4 UNITED STATES TREAS	AT COST	84,261	86,080
91282CDN8 UNITED STATES TREAS	AT COST	84,116	85,826
91282CFW6 US TREASURY N/B	AT COST	79,119	80,269
91282CGA3 UNITED STATES TREAS	AT COST	83,396	84,545
91282CGU9 UNITED STATES TREAS	AT COST	83,333	84,253
91282CHB0 UNITED STATES TREAS	AT COST	83,601	85,002
91282CHM6 UNITED STATES TREAS	AT COST	83,560	84,781
91282CHY0 UNITED STATES TREAS	AT COST	83,416	85,172
91879Q109 VAIL RESORTS INC	AT COST	30,004	30,313
92343V104 VERIZON COMMUNICATIO	AT COST	18,565	22,243
92343VFS8 VERIZON 0.85% 11/20/	AT COST	63,174	65,048
92939U106 WEC ENERGY GROUP INC	AT COST	18,414	19,696
94974BGH7 WELLS FARGO & CODTD	AT COST	72,211	73,311
961214DC4 WESTPAC BANKING CORP	AT COST	66,022	66,854
961214EU3 WESTPAC BANKING CORP	AT COST	52,094	53,151
G5960L103 MEDTRONIC PLC	AT COST	42,795	46,380

TY 2023 IRS 990 e-File Render

Name: MICHAEL TUCH FOUNDATION INC
EIN: 13-6002848

Description	Amount
PY RETURN OF CAPITAL ADJUSTMENT	2,695
ROC ADJ ON CY SALES	447

TY 2023 IRS 990 e-File Render

Name: MICHAEL TUCH FOUNDATION INC

EIN: 13-6002848

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
STATE FILING FEE	250	0		250
CHECKING ACCOUNT FEE	67	0		67
PAYROLL WITHHOLDING	3,034	759		2,275

TY 2023 IRS 990 e-File Render

Name: MICHAEL TUCH FOUNDATION INC

EIN: 13-6002848

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
TAX REFUND	3,642	0	

TY 2023 IRS 990 e-File Render

Name: MICHAEL TUCH FOUNDATION INC

EIN: 13-6002848

Description	Amount
PY PURCHASE OF ACCRUED INTEREST	831
ROUNDING	3

TY 2023 IRS 990 e-File Render

Name: MICHAEL TUCH FOUNDATION INC
EIN: 13-6002848

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMNT MNGMNT FEES (NON-DED	35,994	35,994		

TY 2023 IRS 990 e-File Render

Name: MICHAEL TUCH FOUNDATION INC

EIN: 13-6002848

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	1,343	1,343		0
FEDERAL ESTIMATES - PRINCIPAL	3,652	0		0
FOREIGN TAXES ON NONQUALIFIED	1,383	1,383		0