

For calendar year 2021, or tax year beginning 01-01-2021, and ending 12-31-2021

Name of foundation THE SUWINSKI FAMILY FOUNDATION INC		A Employer identification number 16-1587911	
Number and street (or P.O. box number if mail is not delivered to street address) ASHFORD ADVISORS LLC 30B GROVE ST		Room/suite	B Telephone number (see instructions) (585) 697-0362
City or town, state or province, country, and ZIP or foreign postal code PITTSFORD, NY 14534		C If exemption application is pending, check here ☐	
G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here..... ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ... ☐	
H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 9,733,110		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)				
	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	195,900	195,900		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	250,349			
	b Gross sales price for all assets on line 6a _____ 4,648,087				
	7 Capital gain net income (from Part IV, line 2)		250,349		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances _____				
Operating and Administrative Expenses	b Less: Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	446,249	446,249		
	13 Compensation of officers, directors, trustees, etc.	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	 995	0		995
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	 9,300	0		0
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	 32,890	32,881		0
	24 Total operating and administrative expenses. Add lines 13 through 23	43,185	32,881		995
	25 Contributions, gifts, grants paid	477,000			477,000
	26 Total expenses and disbursements. Add lines 24 and 25				
		520,185	32,881		477,995
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	-73,936			
	b Net investment income (if negative, enter -0-)		413,368		
	c Adjusted net income (if negative, enter -0-)				

Part II		Balance Sheets	Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)	Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing				
	2	Savings and temporary cash investments	104,049	52,483	52,483	
	3	Accounts receivable ▶ <u>109</u>				
		Less: allowance for doubtful accounts ▶ _____		109		
	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)	4,055,010	1,479,979	1,464,753	
	b	Investments—corporate stock (attach schedule)	1,717,013	3,695,491	4,860,556	
	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)	2,329,612	2,903,686	3,355,318		
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)	8,205,684	8,131,748	9,733,110		
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 ▶ ☐					
	24	Net assets without donor restrictions				
	25	Net assets with donor restrictions				
	Foundations that do not follow FASB ASC 958, check here ▶ ☒					
	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	8,205,684	8,131,748		
	29	Total net assets or fund balances (see instructions)	8,205,684	8,131,748		
	30	Total liabilities and net assets/fund balances (see instructions) .	8,205,684	8,131,748		

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 8,205,684
2	Enter amount from Part I, line 27a	2 -73,936
3	Other increases not included in line 2 (itemize) ▶ _____	3 0
4	Add lines 1, 2, and 3	4 8,131,748
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 8,131,748

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 PUBLICALLY TRADED STOCKS	P		
b US TREASURY NOTE	P		
c US TREASURY NOTE	P		
d MUTUAL FUNDS	P		
e MUTUAL FUNDS	P		
CAPITAL GAINS DIVIDENDS	P		

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 139,649		121,781	17,868
b 672,479		685,355	-12,876
c 160,732		162,994	-2,262
d 2,167,741		2,261,854	-94,113
e 1,193,692		1,165,754	27,938
313,794			313,794

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			17,868
b			-12,876
c			-2,262
d			-94,113
e			27,938
			313,794

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	250,349
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

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

Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter

Bracket for line 1a

"N/A" on line 1.

1a

Date of ruling or determination letter: _____ (attach copy of letter if necessary—see instructions)

All other domestic foundations enter 1.39% (0.0139) of line 27b. Exempt foreign organizations enter 4% (0.04) of Part I, line 12, col. (b)

b

Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)

2

Add lines 1 and 2.

3

Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)

4

Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-.

5

Credits/Payments:

6

a 2021 estimated tax payments and 2020 overpayment credited to 2021

6a

18,909

b Exempt foreign organizations—tax withheld at source

6b

0

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

18,909

8

Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.

8

0

9

Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed

9

0

10

Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.

10

13,163

11

Enter the amount of line 10 to be: Credited to 2022 estimated tax Refunded

11

0

13,163

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?

1a

Yes

No

b

Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition.

1b

Yes

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

Yes

No

d

Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:

(1) On the foundation. \$ 0 (2) On foundation managers. \$ 0

e

Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0

2

Has the foundation engaged in any activities that have not previously been reported to the IRS?

2

Yes

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

3

Yes

No

4a

Did the foundation have unrelated business gross income of \$1,000 or more during the year?

4a

Yes

No

b

If "Yes," has it filed a tax return on Form 990-T for this year?.

4b

Yes

No

5

Was there a liquidation, termination, dissolution, or substantial contraction during the year?

5

Yes

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?.

6

Yes

No

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

No

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

No

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 2021 or the taxable year beginning in 2021? See the instructions for Part XIII. If "Yes," complete Part XIII

9

Yes

No

10

Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.

10

Yes

No

Part VI-A

Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ <u>N/A</u>	13	Yes	
14	The books are in care of ▶ <u>ASHFORD ADVISORS LLC</u> Telephone no. ▶ <u>(585) 697-0362</u> Located at ▶ <u>30B GROVE STREET PITTSFORD NY</u> ZIP+4 ▶ <u>14534</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here ▶ and enter the amount of tax-exempt interest received or accrued during the year <u>15</u>			
16	At any time during calendar year 2021, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign			

Part 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.			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?	1a(1)		No
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	1a(2)		No
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	1a(3)		No
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	1a(4)		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)?	1a(5)		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.)	1a(6)		No
b	If any answer is "Yes" to 1a(1)–(6); did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b		
c	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 2021?	1d		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 2021, did the foundation have any undistributed income (lines 6d and 6e, Part XII) for tax year(s) beginning before 2021? If "Yes," list the years ▶ 20____, 20____, 20____, 20____	2a		No
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?	3a		No
b	If "Yes," did it have excess business holdings in 2021 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 2021.)	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 2021?	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:		Yes	No
(1)	Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	5a(1)		No
(2)	Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	5a(2)		No
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	5a(3)		No
(4)	Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	5a(4)		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?	5a(5)		No
b	If any answer is "Yes" to 5a(1)–(5); did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions	5b		
c	Organizations relying on a current notice regarding disaster assistance check here			
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).	5d		
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	6a		No
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870.	6b		No
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	7a		No
b	If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?	7b		
8	Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment during the year?	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
JAN SUWINSKI 451 SHEFFIELD ROAD ITHACA, NY 14850	DIRECTOR, PRESIDENT & TREASURER 3.00	0	0	0
SUSAN SUWINSKI 451 SHEFFIELD ROAD ITHACA, NY 14850	DIRECTOR, SECRETARY 1.00	0	0	0
KAREN KIELAS 1075 FAIRWAY DRIVE EUGENE, OR 97404	DIRECTOR 1.00	0	0	0
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000.				0

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	

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	9,321,711
b	Average of monthly cash balances.	1b	69,189
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	9,390,900
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	9,390,900
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions).	4	140,864
5	Net value of noncharitable-use assets. Subtract line 4 from line 3.	5	9,250,036
6	Minimum investment return. Enter 5% (0.05) of line 5.	6	462,502

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	462,502
2a	Tax on investment income for 2021 from Part V, line 5.	2a	5,746
b	Income tax for 2021. (This does not include the tax from Part V.).	2b	
c	Add lines 2a and 2b.	2c	5,746
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	456,756
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	456,756
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	456,756

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

Part XII

Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2020	(c) 2020	(d) 2021
1 Distributable amount for 2021 from Part X, line 7				456,756
2 Undistributed income, if any, as of the end of 2021:				
a Enter amount for 2020 only.			0	
b Total for prior years: 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2021:				
a From 2016.				
b From 2017.				
c From 2018.				
d From 2019.				12,985
e From 2020.				
f Total of lines 3a through e.	12,985			
4 Qualifying distributions for 2021 from Part XI, line 4: ▶ \$ 477,995				
a Applied to 2020, 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 2021 distributable amount				456,756
e Remaining amount distributed out of corpus	21,239			
5 Excess distributions carryover applied to 2021. (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	34,224			
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 2022				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 2016 not applied on line 5 or line 7 (see instructions)	0			
9 Excess distributions carryover to 2022. Subtract lines 7 and 8 from line 6a	34,224			
10 Analysis of line 9:				
a Excess from 2017				
b Excess from 2018				
c Excess from 2019.				12,985
d Excess from 2020				
e Excess from 2021				21,239

Part XIII

Private Operating Foundations (see instructions and Part VI-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 2021, enter the date of the ruling

b

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

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	Tax year	Prior 3 years			(e) Total
		(a) 2021	(b) 2020	(c) 2019	(d) 2018	
b	85% (0.85) of line 2a					
c	Qualifying distributions from Part XI, 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 IX, line 6 for each year listed . .					
c	"Support" alternative test—enter:					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
	(3) Largest amount of support from an exempt organization					
	(4) Gross investment income					

Part

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).)

JAN SUWINSKI

SUSAN SUWINSKI

b

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

2

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

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

a

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

b

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

c

Any submission deadlines:

d

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

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 350 EUGENE 1430 WILLAMETTE STREET 474 EUGENE,OR 97401	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	3,000
350ORG 20 JAY STREET SUITE 732 BROOKLYN,NY 11201	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	10,000
ALASKA CENTER FOR THE ENVIRONMENT 921 WEST 6TH AVENUE SUITE 200 ANCHORAGE,AK 99501	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	5,000
ALASKA CONSERVATION FOUNDATION 1227 W 9TH AVENUE SUITE 300 ANCHORAGE,AK 99501	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	5,000
AMNESTY INTERNATIONAL USA 5 PENN PLAZA 16TH FLOOR NEW YORK,NY 10001	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	10,000
ANIMAL AID UNLIMITED 6900 37TH AVENUE SW SEATTLE,WA 98126	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	1,000
BEYOND TOXICS PO BOX 1106 EUGENE,OR 97440	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	5,000
CALC 458 BLAIR BOULEVARD EUGENE,OR 97402	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	3,000
CASCADIA WILDLANDS PO BOX 10455 EUGENE,OR 97440	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	5,000
CAYUGA NATURE CENTER 1420 TAUGHANNOCK BOULEVARD ITHACA,NY 14850	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	5,000
CENTER FOR BIOLOGICAL DIVERSITY PO BOX 710 TUCSON,AZ 857020710	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	10,000
CENTER FOR REPRODUCTIVE RIGHTS 199 WATER STREET NEW YORK,NY 10038	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	3,000
COMMUNITY SUPPORTED SHELTERS 1160 GRANT STREET EUGENE,OR 97402	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	15,000
CONSERVATION INTERNATIONAL 2011 CRYSTAL DRIVE SUITE 500 ARLINGTON,VA 22202	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	5,000
DEFENDERS OF WILDLIFE 1130 17TH STREET NW WASHINGTON,DC 20036	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	5,000
DIAN FOSSEY GORILLA FUND INTERNATIONAL 800 CHEROKEE AVENUE SE ATLANTA,GA 303159884	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	2,000
DOCTORS WITHOUT BORDERS PO BOX 5030 HAGERSTOWN,MD 217415030	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	10,000
EARTHJUSTICE 50 CALIFORNIA STREET SUITE 500 SANFRANCISCO,CA 941119846	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	20,000
EGAN WARMING CENTER ST VINCENT DE PAUL SOCIETY OF LANE COUNTY INC PO BOX 24608 EUGENE,OR 97402	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	3,000
ENGENDERHEALTH 505 9TH STREET NW SUITE 601 WASHINGTON,DC 20004	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	20,000
ENVIRONMENTAL DEFENSE FUND 1875 CONNECTICUT AVENUE NW SUITE 600 WASHINGTON,DC 200095739	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	5,000
EUGENE HEALTH CENTER 3579 FRANKLIN BOULEVARD EUGENE,OR 97403	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	10,000
FOOD BANK OF THE SOUTHERN TIER 388 UPPER OAKWOOD AVENUE	NONE	OTHER PUBLIC	UNRESTRICTED GRANTS	30,000

ELMIRA,NY 149031129		CHARITY		
FOOD FOR LANE COUNTY 770 BAILEY HILL ROAD EUGENE,OR 974025451	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	20,000
FRIENDSHIP BRIDGE 405 URBAN STREET SUITE 140 LAKEWOOD,CO 80228	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	5,000
GREENHILL HUMANE SOCIETY 88530 GREEN HILL ROAD EUGENE,OR 97402	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	5,000
LEARN HORSE RESCUE PO BOX 619 RAVENEL,SC 29470	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	1,000
LOAVES & FISHES 210 N CAYUGA STREET ITHACA,NY 14850	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	10,000
MCKENZIE RIVER TRUST 120 SHELTON MCMURPHEY BOULEVARD SUITE 270 EUGENE,OR 97401	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	5,000
NATIONAL PARKS CONSERVATION ASSOCIATION 777 6TH STREET NW SUITE 700 WASHINGTON,DC 200013723	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	5,000
NATIONAL RESOURCES DEFENSE COUNCIL 40 WEST 20TH STREET NEW YORK,NY 10011	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	3,000
NATIONAL WILDLIFE FEDERATION 11100 WILDLIFE CENTER DRIVE RESTON,VA 201905362	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	5,000
NEARBY NATURE PO BOX 3678 EUGENE,OR 97403	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	1,000
OCCUPY MEDICAL PO BOX 50354 EUGENE,OR 97405	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	10,000
OREGON HORSE RESCUE 4771 PACIFIC AVENUE SUITE A EUGENE,OR 97401	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	5,000
OXFAM AMERICA 226 CAUSEWAY STREET 5TH FLOOR BOSTON,MA 021142206	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	5,000
PET HELPERS SC 1447 FOLLY ROAD CHARLESTON,SC 29412	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	5,000
PLANNED PARENTHOOD FEDERATION OF AMERICA PO BOX 97166 WASHINGTON,DC 200907166	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	30,000
PLANNED PARENTHOOD OF ALASKA ANCHORAGE HEALTH CENTER 4001 LAKE OTIS PARKWAY SUITE 101 ANCHORAGE,AK 99508	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	10,000
PLANNED PARENTHOOD OF CHARLESTON CHARLESTON HEALTH CENTER 1312 ASHLEY RIVER ROAD CHARLESTON,SC 29407	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	30,000
POPULATION CONNECTION 2120 L STREET NW SUITE 500 WASHINGTON,DC 20037	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	2,000
POST CARBON INSTITUTE 800 SW WASHINGTON AVENUE SUITE 5 CORVALLIS,OR 97333	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	5,000
PREDATOR DEFENSE PO BOX 5446 EUGENE,OR 97405	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	5,000
PRO-BONE-O PO BOX 1823 EUGENE,OR 97440	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	3,000
SC COASTAL CONSERVATION LEAGUE PO BOX 1765 CHARLESTON,SC 29402	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	10,000
STOVE TEAM INTERNATIONAL PO BOX 14707 PORTLAND,OR 97293	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	2,000
STRAWBERRY MOUNTAIN MUSTANGS PO BOX 2133 ROSEBURG,OR 97470	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	4,000
THE ADIRONDACK COUNCIL PO BOX D-2 ELIZABETHTOWN,NY 129329989	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	20,000

THE JANE GOODALL INSTITUTE 1595 SPRING HILL ROAD SUITE 550 VIENNA,VA 22182	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	5,000
THE SIERRA CLUB FOUNDATION 2101 WEBSTER STREET SUITE 1250 OAKLAND,CA 94612	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	2,000
THE WILDERNESS SOCIETY 1615 M STREET NW WASHINGTON,DC 20036	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	2,000
UNION OF CONCERNED SCIENTISTS 2 BRATTLE SQUARE CAMBRIDGE,MA 021383780	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	5,000
WHITE BIRD CLINIC 341 E 12TH AVENUE EUGENE,OR 97401	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	15,000
WILDLIFE CONSERVATION SOCIETY 2300 SOUTHERN BOULEVARD BRONX,NY 10460	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	5,000
WILLAMETTE ANIMAL GUILD 3045 ROYAL AVENUE EUGENE,OR 97402	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	2,000
WILLAMETTE FARM AND FOOD COALITION PO BOX 41672 EUGENE,OR 97404	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	2,000
WOMEN'S OPPORTUNITY CENTER 315 N TIOGA STREET ITHACA,NY 14850	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	5,000
WORLD SOCIETY FOR THE PROTECTION OF ANIMALS 450 SEVENTH AVE 31ST FLOOR NEW YORK,NY 10123	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	10,000
WORLD WILDLIFE FUND PO BOX 97180 WASHINGTON,DC 200907180	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	5,000
HOPE AND SAFETY ALLIANCE PO BOX 50127 EUGENE,OR 97405	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	5,000
CARRY IT FORWARD PO BOX 50121 EUGENE,OR 97405	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	5,000
SQUARE ONE VILLAGES 15 NORTH POLK STREET EUGENE,OR 97402	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	5,000
CIVIL LIBERTIES DEFENSE CENTER 1430 WILLAMETTE STREET 359 EUGENE,OR 97401	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	5,000
OREGON ENVIRONMENTAL COUNCIL PO BOX 14822 PORTLAND,OR 97293	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	1,000
OREGON WILD 5825 NORTH GREELEY STREET PORTLAND,OR 97217	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	1,000
XERCES SOCIETY PO BOX 97387 WASHINGTON,DC 200907387	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	1,000
Total			3a	477,000
b <i>Approved for future payment</i>				
Total			3b	0

Part XV-A

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

b _____

C _____

d _____

e _____

f _____

g Fees and contracts from government agencies

3 Interest on savings and temporary cash investments

■ ■ ■

a Debt-financed property.

b Not debt-financed property. . . .

7 Other investment income

18

250,349

9 Net income or (loss) from special events:

10 Gross profit or (loss) from sales of inventory

11 Other revenue: a _____

b _____

C _____

d _____

e _____

12 Subtotal. Add columns (b), (d), and (e) . .

13 Total. Add line 12, columns (b), (d), and (e). **13** 446,249
(See worksheet in line 13 instructions to verify calculations.)

Part XV-B

Line No.

▼

Explain below how each activity for which income is reported in column (e) of Part XV-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)

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.

	2022-05-03
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 P00011120
	Firm's name ☐ INSERTO & CO CPAS LLP				Firm's EIN ☐ 47-532457
	Firm's address ☐ 20 THORNWOOD DRIVE ITHACA, NY 14850				Phone no. (607) 272-4444

Additional Data

Return to Form

Software ID:

Software Version:

Form 990PF - Special Condition Description:

Special Condition Description

TY 2021 IRS 990 e-File Render

Name: THE SUWINSKI FAMILY FOUNDATION INC

EIN: 16-1587911

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	995	0		995

TY 2021 IRS 990 e-File Render

Name: THE SUWINSKI FAMILY FOUNDATION INC

EIN: 16-1587911

Name of Stock	End of Year Book Value	End of Year Fair Market Value
SCHWAB EQUITIES	3,695,491	4,860,556

TY 2021 IRS 990 e-File Render

Name: THE SUWINSKI FAMILY FOUNDATION INC

EIN: 16-1587911

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

1,479,979

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

1,464,753

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

0

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

0

TY 2021 IRS 990 e-File Render

Name: THE SUWINSKI FAMILY FOUNDATION INC

EIN: 16-1587911

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
GLOBAL EQUITY	FMV	284,750	443,511
BALANCED MUTUAL FUNDS	FMV	2,618,936	2,911,807

TY 2021 IRS 990 e-File Render

Name: THE SUWINSKI FAMILY FOUNDATION INC

EIN: 16-1587911

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT FEES	32,881	32,881		0
BANK SERVICE CHARGE	9	0		0

TY 2021 IRS 990 e-File Render

Name: THE SUWINSKI FAMILY FOUNDATION INC

EIN: 16-1587911

Name	Address
JAN SUWINSKI	451 SHEFFIELD ROAD ITHACA,NY 14850
SUSAN SUWINSKI	451 SHEFFIELD ROAD ITHACA,NY 14850

TY 2021 IRS 990 e-File Render

Name: THE SUWINSKI FAMILY FOUNDATION INC

EIN: 16-1587911

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
NYS EPTL FEE	500	0		0
EXCISE TAX	8,800	0		0