

For calendar year 2023, or tax year beginning 01-01-2023

, and ending 12-31-2023

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	
City or town, state or province, country, and ZIP or foreign postal code PITTSFORD, NY 14534		B Telephone number (see instructions) (585) 697-0362	
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) ▶\$ 8,615,705		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	121,732	121,732		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	140,034			
	b Gross sales price for all assets on line 6a _____ 4,793,060				
	7 Capital gain net income (from Part IV, line 2)		140,034		
	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	261,766	261,766		
	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)	1,150	0		1,150
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	250	0		0
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	29,097	29,097		0
	24 Total operating and administrative expenses. Add lines 13 through 23	30,497	29,097		1,150
	25 Contributions, gifts, grants paid	587,000			587,000
	26 Total expenses and disbursements. Add lines 24 and 25	617,497	29,097		588,150
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	-355,731			
	b Net investment income (if negative, enter -0-)		232,669		
	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	168,236	132,435	132,435	
	3	Accounts receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____				
	4	Pledges receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)				
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less: allowance for doubtful accounts ▶ _____				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments—U.S. and state government obligations (attach schedule)	2,275,361	1,950,431	2,018,509	
	b	Investments—corporate stock (attach schedule)	5,014,256	5,014,256	6,083,459	
	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)	284,750	284,750	381,302	
	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)	7,742,603	7,381,872	8,615,705		
Liabilities	17	Accounts payable and accrued expenses				
	18	Grants payable				
	19	Deferred revenue.				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable (attach schedule)				
	22	Other liabilities (describe ▶ _____)				
	23	Total liabilities (add lines 17 through 22).	0	0		
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ ☐ and complete lines 24, 25, 29 and 30.					
	24	Net assets without donor restrictions				
	25	Net assets with donor restrictions				
	Foundations that do not follow FASB ASC 958, check here ▶ ☒ and complete lines 26 through 30.					
	26	Capital stock, trust principal, or current funds	0	0		
	27	Paid-in or capital surplus, or land, bldg., and equipment fund	0	0		
	28	Retained earnings, accumulated income, endowment, or other funds	7,742,603	7,381,872		
	29	Total net assets or fund balances (see instructions)	7,742,603	7,381,872		
30	Total liabilities and net assets/fund balances (see instructions) .	7,742,603	7,381,872			

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	7,742,603
2	Enter amount from Part I, line 27a	2	-355,731
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	7,386,872
5	Decreases not included in line 2 (itemize) ▶ _____	5	5,000
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29.	6	7,381,872

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 US TREASURY NOTES		P		
b US TREASURY NOTES		P		
c CAPITAL GAINS DIVIDENDS		P		
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 3,845,657		3,807,176	38,481
b 850,000		845,850	4,150
c 97,403			97,403
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(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	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
a			38,481
b			4,150
c			97,403
d			
e			

2 Capital gain net income or (net capital loss)

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

If gain, also enter in Part I, line 7
If (loss), enter -0- in Part I, line 7

2

3

140,034

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

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1.			
Date of ruling or determination letter: (attach copy of letter if necessary—see instructions)		1	3,234
b 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)			
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	3,234
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	3,234
6 Credits/Payments:			
a 2023 estimated tax payments and 2022 overpayment credited to 2023	6a	11,284	
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	11,284
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.		8	0
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	8,050
11 Enter the amount of line 10 to be: Credited to 2024 estimated tax		11	0
Refunded			

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
	<i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>			
c	Did the foundation file Form 1120-POL for this year?.	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ \$ 0 (2) On foundation managers. ▶ \$ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		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? <i>If "Yes," attach the statement required by General Instruction T.</i>	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: ● By language in the governing instrument, or ● By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XIV.</i>	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? <i>If "No," attach explanation</i> .	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2023 or the taxable year beginning in 2023? See the instructions for Part XIII. <i>If "Yes," complete Part XIII</i>	9		No
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i> 📄	10	Yes	
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)? <i>If "Yes," attach schedule. See instructions.</i>	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? <i>If "Yes," attach statement. See instructions</i>	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ N/A	13	Yes	
14	The books are in care of ▶ ASHFORD ADVISORS LLC Telephone no. ▶ (585) 697-0362 Located at ▶ 30B GROVE STREET PITTSFORD NY ZIP+4 ▶ 14534			
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. <i>If "Yes", enter the name of the foreign country</i> ▶	16	Yes	No
				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):		Yes	No
(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 2023?	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 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____	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 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.)	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 2023?	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  			
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	8,174,584
b	Average of monthly cash balances.	1b	214,274
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	8,388,858
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	8,388,858
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions).	4	125,833
5	Net value of noncharitable-use assets. Subtract line 4 from line 3.. . . .	5	8,263,025
6	Minimum investment return. Enter 5% (0.05) of line 5.	6	413,151

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	413,151
2a	Tax on investment income for 2022 from Part V, line 5.	2a	3,234
b	Income tax for 2022. (This does not include the tax from Part V.).	2b	
c	Add lines 2a and 2b.	2c	3,234
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	409,917
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	409,917
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	409,917

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	588,150
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	
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	588,150

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					409,917
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.					
b From 2019.					12,985
c From 2020.					
d From 2021.					21,239
e From 2022.					109,100
f Total of lines 3a through e.		143,324			
4 Qualifying distributions for 2023 from Part XI, line 4: ▶ \$ 588,150					
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					409,917
e Remaining amount distributed out of corpus		178,233			
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		321,557			
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)		0			
9 Excess distributions carryover to 2024. Subtract lines 7 and 8 from line 6a		321,557			
10 Analysis of line 9:					
a Excess from 2019		12,985			
b Excess from 2020					
c Excess from 2021.		21,239			
d Excess from 2022		109,100			
e Excess from 2023		178,233			

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 <i>Paid during the year</i>				
350 EUGENE 1430 WILLAMETTE STREET 474 EUGENE,OR 97401	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	3,000
3500RG PO BOX 843004 BOSTON,MA 02284	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	10,000
ALASKA CENTER FOR THE ENVIRONMENT 808 E STREET SUITE 100 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 311 WEST 43RD ST 7TH FLOOR NEW YORK,NY 10036	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	15,000
ANIMAL AID UNLIMITED PO BOX 94001 SEATTLE,WA 98124	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	1,000
BEYOND TOXICS PO BOX 1106 EUGENE,OR 97440	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
CASCADIA WILDLANDS PO BOX 10455 EUGENE,OR 97440	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	10,000
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	15,000
CENTER FOR REPRODUCTIVE RIGHTS 199 WATER STREET NEW YORK,NY 10038	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	5,000
COMMUNITY SUPPORTED SHELTERS 1160 GRANT STREET EUGENE,OR 97402	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	10,000
CONSERVATION INTERNATIONAL 2011 CRYSTAL DRIVE SUITE 500 ARLINGTON,VA 22202	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	10,000
DEFENDERS OF WILDLIFE 1130 17TH STREET NW WASHINGTON,DC 20036	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	10,000

DENALI CITIZENS COUNCIL PO BOX 78 DENALI PARK,AK 99755	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	5,000
DOCTORS WITHOUT BORDERS PO BOX 5030 HAGERSTOWN,MD 217415030	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	15,000
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	25,000
ENVIRONMENTAL DEFENSE FUND 1875 CONNECTICUT AVENUE NW SUITE 600 WASHINGTON,DC 200095739	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	10,000
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 ELMIRA,NY 149031129	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	35,000
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	10,000
HOPE AND SAFETY ALLIANCE PO BOX 50127 EUGENE,OR 97405	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
MERCY FOR ANIMALS	NONE	OTHER PUBLIC	UNRESTRICTED GRANTS	5,000

1150 CONRAD COURT HAGERSTOWN,MD 217405905		CHARITY		
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	5,000
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
OREGON ENVIRONMENTAL COUNCIL PO BOX 14822 PORTLAND,OR 97293	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	1,000
OREGON HORSE RESCUE 4325 COMMERCE STREET SUITE 111-463 EUGENE,OR 97402	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	5,000
OREGON WILD 5825 NORTH GREELEY STREET PORTLAND,OR 97217	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	1,000
OUT TO PASTURE PO BOX 2315 ESTACADA,OR 97023	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	3,000
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	5,000
POST CARBON INSTITUTE PO BOX 1143 CORVALLIS,OR 97339	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	1,000
PREDATOR DEFENSE	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	5,000

PO BOX 5446 EUGENE,OR 97405				
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
SQUARE ONE VILLAGES 15 NORTH POLK STREET EUGENE,OR 97402	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	5,000
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	5,000
THE ADIRONDACK COUNCIL PO BOX D-2 ELIZABETHTOWN,NY 129329989	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	20,000
THE JANE GOODALL INSTITUTE 1120 20TH STREET SUITE 520S WASHINGTON,DC 20036	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 ALLIANCE 1441 BROADWAY 5TH FLOOR NEW YORK,NY 10018	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	3,000
WILDLIFE CONSERVATION SOCIETY 2300 SOUTHERN BOULEVARD BRONX,NY 10460	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	10,000
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	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	10,000

NEW YORK,NY 10123				
WORLD WILDLIFE FUND PO BOX 97180 WASHINGTON,DC 200907180	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	10,000
XERCES SOCIETY PO BOX 97387 WASHINGTON,DC 200907387	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	1,000
PLANNED PARENTHOOD - ITHACA HEALTH CENTER 620 WEST SENECA STREET ITHACA,NY 14850	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	40,000
FLORA AND FAUNA INTERNATIONAL 1720 M STREET NW WASHINGTON,DC 20036	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	5,000
HUMANE SOCIETY OF THE US 1255 23RD STREET NW SUITE 430 WASHINGTON,DC 20037	NONE	OTHER PUBLIC CHARITY	UNRESTRICTED GRANTS	5,000
Total			▶ 3a	587,000
b Approved for future payment				
Total			▶ 3b	0

Part XV-A

(e)
Related or exempt
function income
(See
instructions.)

(e)
Related or exempt
function income
(See
instructions.)

o

261,766

13

Part XV-B

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.

2024-05-06

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**

Print/Type preparer's name

Preparer's Signature

Date _____

Check if self-employed ☐

PTIN

P00011120

Firm's name ► INSERO & CO CPAS LLP

Phone no.
(607) 272-4444

Additional Data

Return to Form

Software ID:

Software Version:

Form 990PF - Special Condition Description:

Special Condition Description

TY 2023 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	1,150	0		1,150

TY 2023 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	5,014,256	6,083,459

TY 2023 IRS 990 e-File Render

Name: THE SUWINSKI FAMILY FOUNDATION INC

EIN: 16-1587911

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

1,950,431

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

2,018,509

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

0

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

0

TY 2023 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	381,302

TY 2023 IRS 990 e-File Render

Name: THE SUWINSKI FAMILY FOUNDATION INC

EIN: 16-1587911

Description	Amount
OTHER ADJUSTMENT- 2022 GRANT REPLACEMENT CHECK IN 2023	5,000

TY 2023 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	29,089	29,089		0
BANK SERVICE CHARGE	8	8		0

TY 2023 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 2023 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	250	0		0