Form **990-PF**

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

2022

Open to Public Inspection

For calendar year 2022, or tax year beginning 01-01-2022 , and ending 12-31-2022

Name of foundation
MIZE FAMILY FOUNDATION

A Employer identification number
27-1374636

Number and street (or P.O. box number if mail is not delivered to street address)
2212 QUEEN ANNE AVE NORTH PMB 928

Room/suite

B Telephone number (see instructions)

City or town, state or province, country, and ZIP or foreign postal code
SEATTLE, WA 98109

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)* ▶$ 719,404

J Accounting method: ☑ Cash ☐ Accrual ☐ Other (specify)
(Part I, column (d) must be on cash basis.)

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ..... ▶ ☐

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)	256,134			
	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	16,076	15,993		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	13,312			
	b	Gross sales price for all assets on line 6a 699,653				
	7	Capital gain net income (from Part IV, line 2)		302,854		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less: Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)				
	12	**Total.** Add lines 1 through 11	285,522	318,847	0	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc.	0	0	0	0
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)	4,050	4,658	0	4,657
	c	Other professional fees (attach schedule)	8,335	8,335	0	0
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	15	15	0	0
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)				
	24	**Total operating and administrative expenses.** Add lines 13 through 23	12,400	13,008	0	4,657
	25	Contributions, gifts, grants paid	290,260			290,260
	26	**Total expenses and disbursements.** Add lines 24 and 25	302,660	13,008	0	294,917
	27	Subtract line 26 from line 12:				
	a	**Excess of revenue over expenses and disbursements**	-17,138			
	b	**Net investment income** (if negative, enter -0-)		305,839		
	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	104,717	45,622	45,622
	2	Savings and temporary cash investments			
	3	Accounts receivable ▶			
		Less: allowance for doubtful accounts ▶			
	4	Pledges receivable ▶			
		Less: allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶			
		Less: allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U.S. and state government obligations (attach schedule)	0	51,169	51,169
	b	Investments—corporate stock (attach schedule)	657,636	552,447	552,447
	c	Investments—corporate bonds (attach schedule)	111,388	62,646	62,646
	11	Investments—land, buildings, and equipment: basis ▶			
		Less: accumulated depreciation (attach schedule) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	13,265	7,520	7,520
	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)	887,006	719,404	719,404
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	887,006	719,404	
	29	**Total net assets or fund balances** (see instructions)	887,006	719,404	
	30	**Total liabilities and net assets/fund balances** (see instructions)	887,006	719,404	

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	887,006
2	Enter amount from Part I, line 27a	2	-17,138
3	Other increases not included in line 2 (itemize) ▶	3	0
4	Add lines 1, 2, and 3	4	869,868
5	Decreases not included in line 2 (itemize) ▶	5	150,464
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29	6	719,404

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	25.00 SHS ZOOM VIDEO COMMUNICATIONS	P	2022-01-21	2022-08-12
b	50.00 SHS WARNER BROTHERS DISCOVER	P	2022-01-11	2022-10-04
c	100.00 SHS APPLE INC	P	2008-11-07	2022-01-05
d	150.00 SHS APPLE INC	P	2008-11-07	2022-01-05
e	75.00 SHS VERIZON COMMUNICATIN: VZ	P	2021-01-01	2022-01-05
	50.00 SHS APPLE INC	P	2008-11-07	2022-01-11
	20.00 SHS COSTCO WHOLESALE CO:COST	P	2017-08-30	2022-01-11
	30000.00 SHS CAPITAL IMPACT P 3 3.35XXX	P	2019-01-22	2022-01-15
	50.00 SHS APPLE INC	P	2008-11-07	2022-01-21
	10000.00 SHS U.S. BANCORP	P	2012-08-24	2022-06-15
	450.00 SHS ALPHABET INC	P	2013-04-05	2022-07-29
	200.00 APPLE INC.	P	2013-05-28	2022-07-29
	300.00 SHS MICROSOFT CORP	P	2021-01-01	2022-07-29
	494.00 SHS UNITED PARCEL SRVC	P	2021-01-01	2022-07-29
	50.00 SHS APPLE INC	P	2006-11-07	2022-08-12
	50.00 SHS CITRIX SYSTEMS INC	P	2017-08-31	2022-10-03
	70.00 SHS CONSOLIDATED EDISON	P	2017-08-30	2022-10-04
	250.00 SHS SCHWAB SHORT TERM US TREASURY	P	2021-07-22	2022-10-04
	190.00 SHS APPLE INC	P		2022-01-03
	250,000 SHS SCHWAB TREASURY OBLIG MO	P	2022-09-13	2022-09-14
	CAPITAL GAIN DISTRIBUTION	P		2022-12-31

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	2,737		3,815	-1,078
b	617		1,416	-799
c	17,889		353	17,536
d	26,834		529	26,305
e	4,068		3,441	627
	8,731		176	8,555
	10,361		3,081	7,280
	30,000		30,000	0
	8,184		176	8,008
	10,000		10,000	0
	51,707		8,766	42,941
	32,391		3,159	29,232
	83,707		13,165	70,542
	96,246		45,434	50,812
	8,558		176	8,382
	5,200		3,895	1,305
	6,192		5,906	286
	12,078		12,816	-738
	34,081		495	33,586
	250,000		250,000	0
	72			72

	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				-1,078
b				-799
c				17,536
d				26,305
e				627
				8,555
				7,280
				0
				8,008
				0
				42,941
				29,232
				70,542
				50,812
				8,382
				1,305
				286
				-738
				33,586
				0
				72

	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	302,854
2 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	-1,877

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)**		
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)	1	4,251
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3	Add lines 1 and 2	3	4,251
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0
5	**Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-	5	4,251
6	Credits/Payments:		
a	2022 estimated tax payments and 2021 overpayment credited to 2022 — 6a: 4,679		
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	4,679
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2221 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	428
11	Enter the amount of line 10 to be: **Credited to 2023 estimated tax** ▶ 428 **Refunded** ▶	11	0

Part VI-A Statements Regarding Activities

			Yes	No
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		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		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. ▶ $ 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? *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) ▶ WA			
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 2022 or the taxable year beginning in 2022? 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	Yes	

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?	13	Yes	
	Website address ▶ N/A			
14	The books are in care of ▶ ANNE B MIZE Telephone no. ▶ (206) 601-1039			
	Located at ▶ 2212 QUEEN AVE NORTH PMB 928 SEATTLE WA ZIP+4 ▶ 98109			
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 2022, 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		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

			Yes	No
	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?	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 2022?	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 2022, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2022?	2a		No
	If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer "No" and attach statement—see instructions.)	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	3a		No
b	If "Yes," did it have excess business holdings in 2022 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 2022.)*	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 2022?	4b		No

Part VI-B Statements Regarding Activities for Which Form 4720 May Be Required *(continued)*

			Yes	No
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))?	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?	5d		
	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?	6a		No
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	6b		No
	If "Yes" to 6b, file Form 8870.			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	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
ANNE B MIZE 2212 QUEEN ANNE AVE NORTH PMB 928 SEATTLE, WA 98109	PRESIDENT 1.00	0	0	0
NANETTE FOK 1017 MINOR AVE 1203 SEATTLE, WA 98104	BOARD MEMBER 1.00	0	0	0
JANE BARRY 808 FIFTH AVENUE N SEATTLE, WA 98109	BOARD MEMBER 1.00	0	0	0
KATRIN WILDE 603 STEWART ST SUITE 415 SEATTLE, WA 98101	BOARD MEMBER 1.00	0	0	0
MESKEREM MIZE 848 VERMONT ST APT 6 OAKLAND, CA 94610	BOARD MEMBER 1.00	0	0	0
TRACY RECTOR 117 E LOUISA ST 131 SEATTLE, WA 98102	BOARD MEMBER 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	
Total. Add lines 1 through 3 . . . . . ▶	0

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	749,144
b	Average of monthly cash balances		1b	87,011
c	Fair market value of all other assets (see instructions)		1c	0
d	**Total** (add lines 1a, b, and c)		1d	836,155
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	836,155
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions)		4	12,542
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3		5	823,613
6	**Minimum investment return.** Enter 5% (0.05) of line 5		6	41,181

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	41,181
2a	Tax on investment income for 2022 from Part V, line 5	2a 4,251		
b	Income tax for 2022. (This does not include the tax from Part V.)	2b		
c	Add lines 2a and 2b		2c	4,251
3	Distributable amount before adjustments. Subtract line 2c from line 1		3	36,930
4	Recoveries of amounts treated as qualifying distributions		4	0
5	Add lines 3 and 4		5	36,930
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	36,930

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	294,917
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	294,917

Part XII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2021	(c) 2021	(d) 2022
1 Distributable amount for 2022 from Part X, line 7				36,930
2 Undistributed income, if any, as of the end of 2022:				
a Enter amount for 2021 only.			0	
b Total for prior years: 20___, 20___, 20___		0		
3 Excess distributions carryover, if any, to 2022:				
a From 2017. 270,570				
b From 2018. 188,650				
c From 2019. 243,890				
d From 2020. 260,940				
e From 2021. 244,182				
f **Total** of lines 3a through e	1,208,232			
4 Qualifying distributions for 2022 from Part XI, line 4: ▶ $ 294,917				
a Applied to 2021, 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 2022 distributable amount				36,930
e Remaining amount distributed out of corpus	257,987			
5 Excess distributions carryover applied to 2022. *(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	1,466,219			
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 2021. Subtract line 4a from line 2a. Taxable amount—see instructions			0	
f Undistributed income for 2022. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2023				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 2017 not applied on line 5 or line 7 (see instructions) . . .	270,570			
9 **Excess distributions carryover to 2023.** Subtract lines 7 and 8 from line 6a	1,195,649			
10 Analysis of line 9:				
a Excess from 2018 188,650				
b Excess from 2019 243,890				
c Excess from 2020. . . . 260,940				
d Excess from 2021 244,182				
e Excess from 2022 257,987				

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 2022, 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)

	Tax year	Prior 3 years			(e) Total
	(a) 2022	**(b)** 2021	**(c)** 2020	**(d)** 2019	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part IX for each year listed					
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).)

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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 XIV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	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
a *Paid during the year*				
ENVIRONMENTAL LAW ALLIANCE WORLDWIDE 1412 PEARL STREET EUGENE,OR 97401	NO RELATIONSHIP	P C	FOR THE GENERAL FUND - CIVIC	10,000
FIRST PEOPLES FUND 706 WEST BLVD RAPID CITY,SD 57701	NO RELATIONSHIP	P C	FOR THE GENERAL FUND - CIVIC	20,000
FRIDA 215 SPADINA AVE SUITE 225 TORONTO,ONTARIO CA	NO RELATIONSHIP	P C	FOR THE GENERAL FUND - CIVIC	25,000
FRONT LINE USA FOUNDATION 275 MADISON AVENUE SIXTH FLOOR NEW YORK,NY 10016	NO RELATIONSHIP	P C	FOR THE GENERAL FUND - CIVIC	10,000
GLOBAL PRESS INSTITUTE 700 PENNSYLVANIA AVENUE SE SUITE 2070 WASHINGTON,DC 20003	NO RELATIONSHIP	P C	FOR THE GENERAL FUND - CIVIC	10,000
HONOR THE EARTH PO BOX 63 607 MAIN AVE CALLAWAY,MN 56521	NO RELATIONSHIP	P C	FOR THE GENERAL FUND - CIVIC	25,000
SOUTH SEATTLE EMERALD PO BOX 28505 SEATTLE,WA 98118	NO RELATIONSHIP	P C	FOR THE GENERAL FUND - CIVIC	20,000
THOUSAND CURRENTS 1330 BROADWAY SUITE 301 OAKLAND,CA 94612	NO RELATIONSHIP	P C	TO SUPPORT ZIMBABWE SMALLHOLDER ORGANIC FARMERS' FORUM (ZIMSOFF)	25,000
URGENT ACTION FUND FOR WOMEN'S HUMAN RIGHTS 2601 BLANDING AVE SUITE C 155 ALAMEDA,CA 94501	NO RELATIONSHIP	P C	FOR THE GENERAL FUND - CIVIC	30,260
AFRICAN WOMENS ALLIANCE 1523 29TH AVE N SAINT CLOUD,MN 56303	NO RELATIONSHIP	P C	FOR THE GENERAL FUND - CIVIC	15,000
GLOBAL FUND FOR WOMEN 800 MARKET ST 7TH FLOOR SAN FRANCISCO,CA 94102	NO RELATIONSHIP	P C	FOR THE GENERAL FUND- CIVIC	25,000
NEW VENTURE FUND 1828 L STREET NW SUITE 300A WASHINGTON,DC 20036	NO RELATIONSHIP	P C	FOR THE GENERAL FUND- CIVIC	25,000
UNDOCUBLACK NETWORK INC 1032 15TH STREET NW STE 415 WASHINGTON,DC 20005	NO RELATIONSHIP	P C	FOR THE GENERAL FUND- CIVIC	25,000
PARTNERSHIP PROJECT 301 S ELM ST STE 414 GREENSBORO,NC 27401	NO RELATIONSHIP	P C	FOR THE GENERAL FUND- CIVIC	10,000
COMMUNITY INITIATIVES 1000 BROADWAY SUITE 480	NO RELATIONSHIP	P C	FOR THE GENERAL FUND- CIVIC	15,000

OAKLAND,CA 94607				
Total . . . . . ▶ **3a**				290,260
b *Approved for future payment*				
Total . . . . . ▶ **3b**				0

Part XV-A Analysis of Income-Producing Activities

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	16,076	
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	13,312	
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)		0		29,388	0
13 **Total.** Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calculations.)				**13**	29,388

Part XV-B Relationship of Activities to the Accomplishment of Exempt Purposes

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.)
1	THIS 501(C)(3) ORGANIZATION SUPPORTS VARIOUS CHARITABLE ENTITIES BY MAKING GRANTS TO OTHER 501(C)(3) ENTITIES. THE INCOME LISTED IN COLUMN (C) IS USED TO MAKE GRANTS TO OTHER 501(C)(3) ENTITIES IN SUPPORT OF THEIR ACTIVITIES.

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

		Yes	No
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	1a(1)		No
(2) Other assets	1a(2)		No
b Other transactions:			
(1) Sales of assets to a noncharitable exempt organization	1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization	1b(2)		No
(3) Rental of facilities, equipment, or other assets	1b(3)		No
(4) Reimbursement arrangements	1b(4)		No
(5) Loans or loan guarantees	1b(5)		No
(6) Performance of services or membership or fundraising solicitations	1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		No

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.

(a) Line No.	**(b)** Amount involved	**(c)** Name of noncharitable exempt organization	**(d)** Description of transfers, transactions, and sharing arrangements

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.

▶ Signature of officer or trustee — Date 2023-05-15 — ▶ 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
ERIN S MORGAN				P00710515
Firm's name ▶ RUBINBROWN LLP				Firm's EIN ▶43-0765316
Firm's address ▶ 1200 MAIN STREET SUITE 1000 KANSAS CITY, MO 64105				Phone no. (816) 472-1122

Additional Data

Return to Form

Software ID:

Software Version:

Form 990PF - Special Condition Description:

Special Condition Description

TY 2022 IRS 990 e-File Render

Name: MIZE FAMILY FOUNDATION

EIN: 27-1374636

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PREP FEES	3,400	1,700	0	1,700
ACCOUNTING FEES	650	2,958	0	2,957

TY 2022 IRS 990 e-File Render

Name: MIZE FAMILY FOUNDATION

EIN: 27-1374636

Name of Bond	End of Year Book Value	End of Year Fair Market Value
THE HOME DEPOT,3.75%24	14,866	14,866
A O N PLC 3.5% 24F	9,765	9,765
COACH INC 4.25%25	9,764	9,764
MARRIOTT INTERN 3.125%26	9,326	9,326
INTEL CORP 4%32	9,263	9,263
MICROSOFT CORP 4.2%35	9,662	9,662

TY 2022 IRS 990 e-File Render

Name: MIZE FAMILY FOUNDATION

EIN: 27-1374636

Name of Stock	End of Year Book Value	End of Year Fair Market Value
AIR PROD & CHEMICALS	7,706	7,706
ALPHABET INC.CLASS	8,822	8,822
AMALGAMATED FINL CORP	11,520	11,520
AMAZON.COM INC	13,440	13,440
APPLE INC	25,985	25,985
CHURCH & DWIGHT CO	6,045	6,045
COSTCO WHOLESALE CO	15,977	15,977
EBAY INC	2,902	2,902
ECOLAB INC	4,366	4,366
EMERSON ELECTRIC CO	3,841	3,841
FIRST SOLAR INC	10,484	10,484
HOLOGIC INC	14,961	14,961
HONDA MOTOR CO LTD F	3,085	3,085
ILLINOIS TOOL WORKS	14,980	14,980
INTEL CORP	4,757	4,757
MARSH & MC LENNAN CO	18,202	18,202
MEDTRONIC PLC F	3,498	3,498
MICROSOFT CORP	23,982	23,982
NETFLIX INC	8,847	8,847
ORACLE CORP	6,131	6,131
ORMAT TECHNOLOGIES	4,342	4,342
STARBUCKS CORP	9,920	9,920
SVB FINL GROUP	6,904	6,904
SYSCO CORP	11,085	11,085
THERMO FISHER SCNTFC	16,521	16,521
VERIZON COMMUNICATN	7,092	7,092
VESTAS WIND SYS AS UTD F	3,600	3,600
ZOOM VIDEO COMMUNICATION	6,435	6,435
SCHWAB SHORT TERM US TREASURY ETF	84,420	84,420
SPDR GOLD SHARES ETF	16,964	16,964
CCM COMMUNITY IMPACT BON	35,614	35,614
PARNASSUS FIXED INCOME I	42,591	42,591
VANGUARD INFLATION-PROTE CTED SECS INV	54,016	54,016
WW GRAINGER INC	11,125	11,125
WARNER BROTHERS DISCOVER	1,422	1,422
TREX CO INC	3,683	3,683
INTUITIVE SURGICAL	7,961	7,961
GRAHAM HOLDINGS CO	4,834	4,834
GILEAD SCIENCES INC	8,585	8,585
AVANGRID INC	5,802	5,802

TY 2022 IRS 990 e-File Render

Name:	MIZE FAMILY FOUNDATION
EIN:	27-1374636
US Government Securities - End of Year Book Value:	51,169
US Government Securities - End of Year Fair Market Value:	51,169
State & Local Government Securities - End of Year Book Value:	0
State & Local Government Securities - End of Year Fair Market Value:	0

TY 2022 IRS 990 e-File Render

Name: MIZE FAMILY FOUNDATION

EIN: 27-1374636

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
DIGITAL REALTY TRUST REIT	FMV	7,520	7,520

TY 2022 IRS 990 e-File Render

Name: MIZE FAMILY FOUNDATION

EIN: 27-1374636

Description	Amount
UNREALIZED DEPRECIATION	150,464

TY 2022 IRS 990 e-File Render

Name: MIZE FAMILY FOUNDATION

EIN: 27-1374636

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
SCHWAB INVESTMENT MANAGEMENT FEES	8,335	8,335	0	0

TY 2022 IRS 990 e-File Render

Name: MIZE FAMILY FOUNDATION

EIN: 27-1374636

Name	Address
ANNE B MIZE	2212 QUEEN ANNE AVE NORTH PMB 928 SEATTLE,WA 98109

TY 2022 IRS 990 e-File Render

Name: MIZE FAMILY FOUNDATION

EIN: 27-1374636

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	15	15	0	0