

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

Name of foundation PERKINS HUNTER FOUNDATION		A Employer identification number 36-3486609	
Number and street (or P.O. box number if mail is not delivered to street address) 377 E BUTTERFIELD ROAD 220		Room/suite	
City or town, state or province, country, and ZIP or foreign postal code LOMBARD, IL 60148		B Telephone number (see instructions) (312) 341-9727	
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) ☒ \$ 11,412,256		J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)	

Part I		Analysis of Revenue and Expenses <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)</i>		(a)	Revenue and expenses per books	(b)	Net investment income	(c)	Adjusted net income	(d)	Disbursements for charitable purposes (cash basis only)	
Revenue	1	Contributions, gifts, grants, etc., received (attach schedule)			99,705							
	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			103,646		103,646					
	5a	Gross rents										
	b	Net rental income or (loss)										
	6a	Net gain or (loss) from sale of assets not on line 10			236,018							
	b	Gross sales price for all assets on line 6a			8,334,408							
	7	Capital gain net income (from Part IV, line 2)					236,018					
	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)			141,489		141,489						
12	Total. Add lines 1 through 11			580,858		481,153						
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc.										
	14	Other employee salaries and wages										
	15	Pension plans, employee benefits										
	16a	Legal fees (attach schedule)			2,500		2,500					
	b	Accounting fees (attach schedule)										
	c	Other professional fees (attach schedule)										
	17	Interest										
	18	Taxes (attach schedule) (see instructions)										
	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			2,500		2,500					
	25	Contributions, gifts, grants paid			889,900						889,900	
26	Total expenses and disbursements. Add lines 24 and 25			892,400		2,500				889,900		
	27	Subtract line 26 from line 12:										
	a	Excess of revenue over expenses and disbursements			-311,542							
	b	Net investment income (if negative, enter -0-)					478,653					
	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		3,489	3,914	3,914
	2	Savings and temporary cash investments		394,687	445,611	445,611
	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)		1,593,416	999,745	999,940
	b	Investments—corporate stock (attach schedule)		3,914,148	5,704,711	7,328,653
	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)				
	14	Land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____				
15	Other assets (describe ▶ _____)		3,056,581	2,463,408	2,634,138	
16	Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)		8,962,321	9,617,389	11,412,256	
Liabilities	17	Accounts payable and accrued expenses				
	18	Grants payable				
	19	Deferred revenue.				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable (attach schedule)				
	22	Other liabilities (describe ▶ _____)				
	23	Total liabilities (add lines 17 through 22).			0	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ ☐ and complete lines 24, 25, 29 and 30.					
	24	Net assets without donor restrictions				
	25	Net assets with donor restrictions				
	Foundations that do not follow FASB ASC 958, check here ▶ ☒ and complete lines 26 through 30.					
	26	Capital stock, trust principal, or current funds		8,962,321	9,617,389	
	27	Paid-in or capital surplus, or land, bldg., and equipment fund				
	28	Retained earnings, accumulated income, endowment, or other funds				
	29	Total net assets or fund balances (see instructions)		8,962,321	9,617,389	
	30	Total liabilities and net assets/fund balances (see instructions) .		8,962,321	9,617,389	

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	8,962,321
2	Enter amount from Part I, line 27a	2	-311,542
3	Other increases not included in line 2 (itemize) ▶ _____	3	977,535
4	Add lines 1, 2, and 3	4	9,628,314
5	Decreases not included in line 2 (itemize) ▶ _____	5	10,925
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29.	6	9,617,389

Part IV Capital Gains and Losses for Tax on Investment Income

		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)	(c)	(d)
		(a)	(b)		

Part VII

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1.		
	Date of ruling or determination letter: _____ (attach copy of letter if necessary—see instructions)		
b	Reserved	1	6,653
c	All other domestic foundations enter 1.39% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	
3	Add lines 1 and 2.	3	6,653
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-.	5	6,653
6	Credits/Payments:		
a	2020 estimated tax payments and 2019 overpayment credited to 2020	6a	4,400
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	6,500
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	10,900
8	Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached.	8	38
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	4,209
11	Enter the amount of line 10 to be: Credited to 2021 estimated tax Refunded	11	

Part VII-A

Statements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		Yes	No
1a				No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? (see Instructions for 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>			
1c				No
c	Did the foundation file Form 1120-POL for this year?			No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ☐ \$ _____ (2) On foundation managers. ☐ \$ _____			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ☐ \$ _____			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		No
	<i>If "Yes," attach a detailed description of the activities.</i>			
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?	5		No
	<i>If "Yes," attach the statement required by General Instruction T.</i>			
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 XV.</i>	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ IL			
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 2020 or the taxable year beginning in 2020? See the instructions for Part XIV. <i>If "Yes," complete Part XIV</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		No

Part VII-A

Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.	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>THOMAS PERKINS</u> Telephone no. ▶ <u>(415) 351-2300</u> Located at ▶ <u>3565 WASHINGTON ST SAN FRANCISCO CA</u> ZIP+4 ▶ <u>94118</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 2020, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign			No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ 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)? ☐ Yes ☒ 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.) ☐ Yes ☒ 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 ☐ Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐	1b		No
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2020? ☐	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):			
a	At the end of tax year 2020, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2020? ☐ Yes ☒ No If "Yes," list the years ▶ <u>20</u> , <u>20</u> , <u>20</u> , <u>20</u>			
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. ▶ <u>20</u> , <u>20</u> , <u>20</u> , <u>20</u>			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2020 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period?(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2020.)	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2020?	4b		No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a

During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

b

If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions

Organizations relying on a current notice regarding disaster assistance check here.

☒

c

If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945–5(d).

6a

Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

b

Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

☐ Yes ☐ No

If "Yes" to 6b, file Form 8870.

7a

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

☐ Yes ☒ No

b

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

☐ Yes ☐ No

8

Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment during the year?

☐ Yes ☒ No

	Yes	No
5b		
6b		No
7b		

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1

List all officers, directors, trustees, foundation managers and their compensation. See instructions

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
THOMAS PERKINS 3565 WASHINGTON STREET SAN FRANCISCO, CA 94118	DIRECTOR 0.00	0		
ALEC PERKINS 1926 PINE STREET SAN FRANCISCO, CA 94109	DIRECTOR 0.00	0		
JAMEL PERKINS 207 MAPLE STREET SAN FRANCISCO, CA 94118	DIRECTOR 0.00	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.

Form 990-PF (2020)

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

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

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

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

Total. Add lines 1 through 3

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities.	1a	7,349,545
b	Average of monthly cash balances.	1b	1,115,291
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	8,464,836
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	
3	Subtract line 2 from line 1d.	3	8,464,836
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	126,973
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	8,337,863
6	Minimum investment return. Enter 5% of line 5.	6	416,893

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6.	1	416,893
2a	Tax on investment income for 2020 from Part VI, line 5.	2a	6,653
b	Income tax for 2020. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b.	2c	6,653
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	410,240
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	410,240
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1. . . .	7	410,240

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26.	1a	889,900
b	Program-related investments—total from Part IX-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 V, line 8, and Part XIII, line 4	4	889,900
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions.	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	889,900
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.			

Part XIII

Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2019	(c) 2019	(d) 2020
1 Distributable amount for 2020 from Part XI, line 7				410,240
2 Undistributed income, if any, as of the end of 2020:				
a Enter amount for 2019 only.				
b Total for prior years: 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2020:				
a From 2015.	168,290			
b From 2016.	130,676			
c From 2017.	195,033			
d From 2018.	128,364			
e From 2019.	262,421			
f Total of lines 3a through e.	884,784			
4 Qualifying distributions for 2020 from Part XII, line 4: ▶ \$ 889,900				
a Applied to 2019, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2020 distributable amount				410,240
e Remaining amount distributed out of corpus	479,660			
5 Excess distributions carryover applied to 2020. (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	1,364,444			
b Prior years' undistributed income. Subtract line 4b from line 2b.				
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				
d Subtract line 6c from line 6b. Taxable amount—see instructions.				
e Undistributed income for 2019. Subtract line 4a from line 2a. Taxable amount—see instructions.				
f Undistributed income for 2021. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).				
8 Excess distributions carryover from 2015 not applied on line 5 or line 7 (see instructions)	168,290			
9 Excess distributions carryover to 2021. Subtract lines 7 and 8 from line 6a	1,196,154			
10 Analysis of line 9:				
a Excess from 2016	130,676			
b Excess from 2017	195,033			
c Excess from 2018.	128,364			
d Excess from 2019	262,421			
e Excess from 2020	479,660			

Part XIV

- Part XV** **Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see instructions.)**

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).)

THOMAS PERKINS

- 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.

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

Part XV

Supplementary Information (continued)

3

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
SAN FRANCISCO FOUNDATION 225 BUSH STREET SAN FRANCISCO,CA 94104		P C	GENERAL USE	400,000
SAN FRANCISCO EDUCATIONAL FUND 47 KEARNEY STREET SAN FRANCISCO,CA 94108		P C	GENERAL USE	25,000
KQED RADIO 2601 MARIPOSA STREET SAN FRANCISCO,CA 94110		P C	GENERAL USE	25,000
PHILANTHROPY WORKSHOP WEST 201 California Street Suite 630 San Francisco,CA 94111		P C	GENERAL USE	6,400
TIPPING POINT COMMUNITY 220 MONTGOMERY STREET SUITE 850 SAN FRANCISCO,CA 94104		P C	GENERAL USE	100,000
SAN FRANCISCO GIANTS COMMUNITY FUND 24 Willie Mays Plaza SAN FRANCISCO,CA 94107		P C	GENERAL USE	6,500
YOUTH WELLNESS CENTER 3450 Third Street SAN FRANCISCO,CA 94124		P C	GENERAL USE	20,000
AMERICAN CONSERVATORY THEATER 30 GRANT AVENUE SAN FRANCISCO,CA 94108		P C	GENERAL USE	5,000
CAREMESSAGE PO BOX 7307 SAN FRANCISCO,CA 94120		P C	GENERAL USE	10,000
FREEDOM FORWARD 702 15TH STREET SAN FRANCISCO,CA 94103		P C	GENERAL USE	75,000
SAN FRANCISCO GENERAL HOSPITAL FOUN PO BOX 410836 SAN FRANCISCO,CA 94141		P C	GENERAL USE	50,000
SOUTHERN COALITION FOR SOCIAL JUSTI 1415 WEST HIGHWAY 54 DURHAM,NC 27707		P C	GENERAL USE	10,000
NARAL 335 SOUTH VAN NESS SAN FRANCISCO,CA 94103		P C	GENERAL USE	15,000
STAND 1410 DANZIG PLAZA CONCORD,CA 94520		P C	GENERAL USE	5,000
VOTO LATINO PO BOX 35608 WASHINGTON,DC 20033		P C	GENERAL USE	15,000
ACCELERATE CHANGE 294 WASHINGTON STREET BOSTON,MA 02108		P C	GENERAL USE	10,000
AMERICA VOTES 1155 CONNECTICUT AVE NW WASHINGTON,DC 20036		P C	GENERAL USE	15,000
FOUNDATION FOR SOCIAL IMPACT 417 MAIN STREET LITTLE ROCK,AR 72201		P C	GENERAL USE	10,000
TURNOUT ACTIVISM 36 WALDEN STREET CAMBRIDGE,MA 02108		P C	GENERAL USE	10,000
FEEL GOOD VOTING 1515 12TH AVE SEATTLE,WA 98122		P C	GENERAL USE	5,000
NEW VENTURE FUND 1201 CONNECTICUT AVE NW WASHINGTON,DC 20036		P C	GENERAL USE	15,000
HOPEWELL FUND 1201 CONNECTICUT AVE NW WASHINGTON,DC 20036		P C	GENERAL USE	10,000
COUNT EVERY VOTE 1401 K STREET NW WASHINGTON,DC 20005		P C	GENERAL USE	10,000
VOTER REGISTRATION PROJECT PO BOX 33436 WASHINGTON,DC 20033		P C	GENERAL USE	25,000
UP 2 US FOUNDATION 11160 VEIRS MILL ROAD WHEATON,MD 20902		P C	GENERAL USE	5,000
ALL AMERICANS VOTE PO BOX 33436 WASHINGTON,DC 20033		P C	GENERAL USE	7,000
Total			▶ 3a	889,900
b <i>Approved for future payment</i>				
Total			▶ 3b	

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions.)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue:					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments.					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	103,646	
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.			18	141,489	
8 Gain or (loss) from sales of assets other than inventory			1	236,018	
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).				481,153	
13 Total. Add line 12, columns (b), (d), and (e).			13		481,153

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

[illegible]

Part XVII

Yes	No
-----	----

	No
--	----

--	--

	No
--	----

	Nc

	No
--	-----------

	No
--	-----------

No

No

No

le

[illegible]

☐ 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.

2021-09-10

Date _____

Title

May the IRS discuss this return with the preparer shown below
(see instr.) ☒ Yes ☐ No

**Paid
Preparer
Use Only**

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN P00839403
	Burt W Engelberg				
	Firm's name ☐ ENGELBERG & SMITH				Firm's EIN ☐ 36-422979
	Firm's address ☐ 20 NORTH CLARK STREET 3000 CHICAGO, IL 60602				Phone no. (312) 580-1236

Additional Data

[Return to Form](#)

Software ID: 20011551

Software Version: 2020v4.0

Form 990PF - Special Condition Description:

Special Condition Description

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF. ▶ Go to www.irs.gov/Form990 for the latest information.	OMB No. 1545-0047
		2020
Name of the organization PERKINS HUNTER FOUNDATION		Employer identification number 36-3486609

Organization type (check one):

Filers of:	Section:
Form 990 or 990-EZ	☐ 501(c)() (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year ▶ \$ _____

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization PERKINS HUNTER FOUNDATION	Employer identification number 36-3486609
---	--

Part I

Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	PERKINS REVOCABLE TRUST 3565 WASHINGTON STREET SAN FRANCISCO, CA 94118	\$ 15,550	☐ Person ☐ Payroll ☒ Noncash (Complete Part II for noncash contributions.)
2	PERKINS REVOCABLE TRUST 3565 WASHINGTON STREET SAN FRANCISCO, CA 94118	\$ 5,335	☐ Person ☐ Payroll ☒ Noncash (Complete Part II for noncash contributions.)
3	PERKINS REVOCABLE TRUST 3565 WASHINGTON STREET SAN FRANCISCO, CA 94118	\$ 14,384	☐ Person ☐ Payroll ☒ Noncash (Complete Part II for noncash contributions.)
4	PERKINS REVOCABLE TRUST 3565 WASHINGTON STREET SAN FRANCISCO, CA 94118	\$ 5,224	☐ Person ☐ Payroll ☒ Noncash (Complete Part II for noncash contributions.)
5	PERKINS REVOCABLE TRUST 3565 WASHINGTON STREET SAN FRANCISCO, CA 94118	\$ 5,284	☐ Person ☐ Payroll ☒ Noncash (Complete Part II for noncash contributions.)
6	PERKINS REVOCABLE TRUST 3565 WASHINGTON STREET SAN FRANCISCO, CA 94118	\$ 7,196	☐ Person ☐ Payroll ☒ Noncash (Complete Part II for noncash contributions.)

Name of organization PERKINS HUNTER FOUNDATION	Employer identification number 36-3486609
---	--

Part I

Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
7	PERKINS REVOCABLE TRUST 3565 WASHINGTON STREET SAN FRANCISCO, CA 94118	\$ 11,880	☐ Person ☐ Payroll ☒ Noncash (Complete Part II for noncash contributions.)
8	PERKINS REVOCABLE TRUST 3565 WASHINGTON STREET		☐ Person ☐ Payroll

	SAN FRANCISCO, C A 94118	\$ 8,838	☒ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
9	PERKINS REVOCABLE TRUST 3565 WASHINGTON STREET SAN FRANCISCO, C A 94118	\$ 8,418	☐ Person ☐ Payroll ☒ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
.		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
.		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
.		\$	☐ Person ☐ Payroll ☐ Noncash (Complete Part II for noncash contributions.)

Name of organization PERKINS HUNTER FOUNDATION	Employer identification number 36-3486609
---	--

Part II

Noncash Property (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	296.808 SHARES ALLIANZ GI FOCUSED GROWTH FUND CL A	\$ 15,550	2020-01-03
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
2	666 SHARES ALLIANCEBERNSTEIN INCM FD ADV	\$ 5,335	2020-01-03
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
3	58 SHARES FIRST NATIONAL BANK ALASKA	\$ 14,384	2020-01-03
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
4	89 SHARES US BANCORP	\$ 5,224	2020-01-03
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
5	135 SHARES AT&T	\$ 5,284	2020-01-03
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
6	128 SHARES TRUIST FINL CORP	\$ 7,196	2020-01-03

Schedule B (Form 990, 990-EZ, or 990-PF) (2020)

Name of organization PERKINS HUNTER FOUNDATION	Employer identification number 36-3486609
---	--

Part II

Noncash Property (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
7	1,000 SHARES DWS STRATEGIC MUNICIPAL	\$ 11,880	2020-01-03
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
8	176 SHARES BANK OF NY MELLON CO	\$ 8,838	2020-01-03
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
9	100 SHARES NOVARTIS AG	\$ 8,418	2020-10-26
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
.		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
.		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
.		\$	

Name of organization PERKINS HUNTER FOUNDATION	Employer identification number 36-3486609
---	--

Part III

Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ▶ \$

Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	

Additional Data

[Return to Form](#)

Software ID: 20011551

Software Version: 2020v4.0

TY 2020 IRS 990 e-File Render

Name: PERKINS HUNTER FOUNDATION

EIN: 36-3486609

Software ID: 20011551

Software Version: 2020v4.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Engelberg & Smith	2,500	2,500	0	0

TY 2020 IRS 990 e-File Render

Name: PERKINS HUNTER FOUNDATION

EIN: 36-3486609

Software ID: 20011551

Software Version: 2020v4.0

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
0.5568% GLOBAL SME GROWTH FUND			840,273
1,200 SUN COMM			182,340
1,200 SUN COMMUNITIES		156,907	
1,400 LAMAR ADV			116,508
1,400 LAMAR ADVERTISING CO0050		65,894	
2,000 EQUITY LIFESTYLE		119,681	126,720
200 ACTUA CORP		2,554	
3,000 AMERICOLD REALTY TR			111,990
3,000 AMERICOLD REALTY TRUST		111,290	
3,000 POTLATCH		101,132	150,060
3,000 WEYERHAEUSER		60,020	100,590
6.757% HUNTER DIVERSIFIED FUND		1,005,657	1,005,657
GLOBAL SME GROWTH FUND LP	1,065,499	840,273	

TY 2020 IRS 990 e-File Render

Name: PERKINS HUNTER FOUNDATION

EIN: 36-3486609

Software ID: 20011551

Software Version: 2020v4.0

Description	Amount
Excise Taxes	10,900
Foreign Taxes	25

TY 2020 IRS 990 e-File Render

Name: PERKINS HUNTER FOUNDATION

EIN: 36-3486609

Software ID: 20011551

Software Version: 2020v4.0

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Other Investment Income	141,489	141,489	

TY 2020 IRS 990 e-File Render

Name: PERKINS HUNTER FOUNDATION

EIN: 36-3486609

Software ID: 20011551

Software Version: 2020v4.0

Description	Amount
Partnership Distributions	977,535