



PRIVACY POLICY

CPAS, LIKE ALL PROVIDERS OF PERSONAL FINANCIAL SERVICES, ARE NOW REQUIRED BY LAW TO INFORM THEIR CLIENTS OF THEIR POLICIES REGARDING PRIVACY OF CLIENT INFORMATION. CPAS HAVE BEEN AND CONTINUE TO BE BOUND BY PROFESSIONAL STANDARDS OF CONFIDENTIALITY THAT ARE EVEN MORE STRINGENT THAN THOSE REQUIRED BY LAW. THEREFORE, WE HAVE ALWAYS PROTECTED YOUR RIGHT TO PRIVACY.

TYPES OF NONPUBLIC PERSONAL INFORMATION WE COLLECT

WE COLLECT NONPUBLIC PERSONAL INFORMATION ABOUT YOU THAT IS EITHER PROVIDED TO US BY YOU OR OBTAINED BY US WITH YOUR AUTHORIZATION.

PARTIES TO WHOM WE DISCLOSE INFORMATION

FOR CURRENT AND FORMER CLIENTS, WE DO NOT DISCLOSE ANY NONPUBLIC PERSONAL INFORMATION OBTAINED IN THE COURSE OF OUR PRACTICE EXCEPT AS REQUIRED OR PERMITTED BY LAW. PERMITTED DISCLOSURES INCLUDE, FOR INSTANCE, PROVIDING INFORMATION TO OUR EMPLOYEES AND, IN LIMITED SITUATIONS, TO UNRELATED THIRD PARTIES WHO NEED TO KNOW THAT INFORMATION TO ASSIST US IN PROVIDING SERVICES TO YOU. IN ALL SUCH SITUATIONS, WE STRESS THE CONFIDENTIAL NATURE OF INFORMATION BEING SHARED.

PROTECTING THE CONFIDENTIALITY AND SECURITY OF CURRENT AND FORMER CLIENTS' INFORMATION

WE RETAIN RECORDS RELATING TO PROFESSIONAL SERVICES THAT WE PROVIDE SO THAT WE ARE BETTER ABLE TO ASSIST YOU WITH YOUR PROFESSIONAL NEEDS AND, IN SOME CASES, TO COMPLY WITH PROFESSIONAL GUIDELINES. IN ORDER TO GUARD YOUR NONPUBLIC PERSONAL INFORMATION, WE MAINTAIN PHYSICAL, ELECTRONIC, AND PROCEDURAL SAFEGUARDS THAT COMPLY WITH OUR PROFESSIONAL STANDARDS.

PLEASE CALL IF YOU HAVE ANY QUESTIONS, BECAUSE YOUR PRIVACY, OUR PROFESSIONAL ETHICS, AND THE ABILITY TO PROVIDE YOU WITH QUALITY FINANCIAL SERVICES ARE VERY IMPORTANT TO US.

EXTENSION FILING INSTRUCTIONS

FORM 8868 FOR FORM 990-PF

FOR THE YEAR ENDING

DECEMBER 31, 2020

PREPARED FOR:

SILVIO AND SALLY J. INGUI CHARITABLE TRUST 8400 E DIXILETA DRIVE, UNIT 192 SCOTTSDALE, AZ 85266

PREPARED BY:

MURPHY, MILLER, BAGLIERI LLP 65 HARRISTOWN ROAD GLEN ROCK, NJ 07452

AMOUNT DUE:

BALANCE DUE OF \$125

MAIL CHECK PAYABLE TO:

PAYMENTS SHOULD BE MADE USING THE ELECTRONIC FEDERAL TAX PAYMENT SYSTEM (EFTPS).

MAIL EXTENSION AND (CHECK IF APPLICABLE) TO:

NOT APPLICABLE

EXTENSION MUST BE MAILED ON OR BEFORE:

NOT APPLICABLE

SPECIAL INSTRUCTIONS:

THE EXTENSION FOR FORM 990-PF HAS QUALIFIED FOR ELECTRONIC FILING. FORM 8868 EXTENDS THE DUE DATE OF THE ORGANIZATION'S FORM 990-PF RETURN UNTIL NOVEMBER 15, 2021. THE EXTENSION HAS BEEN TRANSMITTED ELECTRONICALLY TO THE IRS AND NO FURTHER ACTION IS REQUIRED.

Form 8879-EC

IRS e-file Signature Authorization for an Exempt Organization

| calendar year 2020, or fiscal year beginning | , 2020, and ending | , 20 |
|--|--------------------|------|

(EIN)

OMB No. 1545-0047

Department of the Treasury Internal Revenue Service

Do not send to the IRS. Keep for your records. ► Go to www.irs.gov/Form8879EO for the latest information.

Name of exempt organization or person subject to tax

SILVIO AND SALLY J. INGUI CHARITABLE TRUST

84-3818432

Taxpayer identification number

Name and title of officer or person subject to tax STEPHEN INGUI

TRUSTEE

| Part I | Type of Return and Return Information | (Whole Dollars Only) |
|--------|---------------------------------------|----------------------|

Check the box for the return for which you are using this Form 8879-EO and enter the applicable amount, if any, from the return. If you check the box on line 1a, 2a, 3a, 4a, 5a, 6a, or 7a below, and the amount on that line for the return being filed with this form was blank, then leave line 1b, 2b, 3b, 4b, 5b, 6b, or 7b, whichever is applicable, blank (do not enter -0-). But, if you entered -0- on the return then enter .0. on the applicable line below. Do not complete more than one line in Part I

| return, then enter -0- on the applicable line below. Do not complete more than one line line line act. | | | | |
|---|------------------------|--|--|--|
| 1a Form 990 check here b Total revenue, if any (Form 990, Part VIII, column (A), line 12) | 1b | | | |
| 2a Form 990-EZ check here b Total revenue, if any (Form 990-EZ, line 9) | 2b | | | |
| 3a Form 1120-POL check here b Total tax (Form 1120-POL, line 22) | 3b | | | |
| 4a Form 990-PF check here X b Tax based on investment income (Form 990-PF, Part VI, line 5) | | | | |
| 5a Form 8868 check here b Balance due (Form 8868, line 3c) | 5b | | | |
| 6a Form 990-T check here b Total tax (Form 990-T, Part III, line 4) | 6b | | | |
| 7a Form 4720 check here b Total tax (Form 4720, Part III, line 1) | 7b | | | |
| Part II Declaration and Signature Authorization of Officer or Person Subject to Tax | | | | |
| Under penalties of periury. I declare that X Lam an officer of the above organization or | to tax with respect to | | | |

of the 2020 electronic return and accompanying schedules and statements, and, to the best of my knowledge and belief, they are true, correct, and complete. I further declare that the amount in Part I above is the amount shown on the copy of the electronic return. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send the return to the IRS and to receive from the IAS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund. If applicable, I authorize the U.S. Treasury and its designated Financial Agent to initiate an electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of the federal taxes owed on this return, and the financial institution to debit the entry to this account. To revoke a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537 no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment. I have selected a personal identification number (PIN) as my signature for the electronic return and, if applicable, the consent to electronic funds withdrawal.

PIN: check one box only

(name of organization)

| Χl | Lauthorize | MURPHY. | MTTTER | BAGLTERT | TATA |
|----|------------|---------|--------|----------|------|

to enter my PIN

and that I have examined a copy

ERO firm name

Enter five numbers, but

as my signature on the tax year 2020 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I also authorize the aforementioned ERO to enter my PIN on the return's disclosure consent screen.

As an officer or person subject to tax with respect to the organization, I will enter my PIN as my signature on the tax year 2020 electronically filed return. If I have indicated within this return that a copy of the return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I will enter my PIN on the return's disclosure consent screen.

Signature of officer or person subject to tax Certification and Authentication Part III

ERO's EFIN/PIN. Enter your six-digit electronic filing identification

number (EFIN) followed by your five-digit self-selected PIN.

22974280255

I certify that the above numeric entry is my PIN, which is my signature on the 2020 electronically filed return indicated above. I confirm that I am submitting this return in accordance with the requirements of Pub. 4163, Modernized e-File (MeF) Information for Authorized IRS e-file Providers for Business Returns.

ERO's signature

ERO Must Retain This Form - See Instructions Do Not Submit This Form to the IRS Unless Requested To Do So

LHA For Paperwork Reduction Act Notice, see instructions.

Form **8879-EO** (2020)



Form **8868**

(Rev. January 2020)

Department of the Treasury Internal Revenue Service

Application for Automatic Extension of Time To File an Exempt Organization Return

File a separate application for each return.

► Go to www.irs.gov/Form8868 for the latest information.

Electronic filing (e-file). You can electronically file Form 8868 to request a 6-month automatic extension of time to file any of the

OMB No. 1545-0047

forms listed below with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, for which an extension request must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/e-file-providers/e-file-for-charities-and-non-profits. Automatic 6-Month Extension of Time. Only submit original (no copies needed). All corporations required to file an income tax return other than Form 990-T (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns. Taxpayer identification number (TIN) Name of exempt organization or other filer, see instructions. Type or SILVIO AND SALLY J. INGUI CHARITABLE print 84-3818432 TRUST File by the Number, street, and room or suite no. If a P.O. box, see instructions. due date for filina vour 8400 E DIXILETA DRIVE, UNIT 192 instructions City, town or post office, state, and ZIP code. For a foreign address, see instructions. SCOTTSDALE, AZ 85266 Enter the Return Code for the return that this application is for (file a separate application for each return) 0 4 Return Application Application Return Code Is For Is For Code Form 990 or Form 990-EZ 01 Form 990-T (corporation) 07 Form 990-BL 02 Form 1041-A 08 Form 4720 (individual) 03 Form 4720 (other than individual) 09 10 Form 990-PF 04 Form 5227 Form 990-T (sec. 401(a) or 408(a) trust) Form 6069 11 Form 990-T (trust other than above) 06 Form 8870 12 THE FOUNDATION The books are in the care of ► 8400 E DIXILETA DRIVE, UNIT 192 - SCOTTSDALE, AZ 85266 Telephone No. ► 4806569011 Fax No. If the organization does not have an office or place of business in the United States, check this box If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) . If this is for the whole group, check this box 🕨 🔲 . If it is for part of the group, check this box 🕨 📉 and attach a list with the names and TINs of all members the extension is for. I request an automatic 6-month extension of time until NOVEMBER 15, 2021, to file the exempt organization return for the organization named above. The extension is for the organization's return for: ► X calendar year 2020 or tax year beginning , and ending

Caution: If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

| Initial return

LHA For Privacy Act and Paperwork Reduction Act Notice, see instructions.

using EFTPS (Electronic Federal Tax Payment System). See instructions.

If the tax year entered in line 1 is for less than 12 months, check reason:

3a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less

If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.

Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by

Change in accounting period

any nonrefundable credits. See instructions.

Form **8868** (Rev. 1-2020)

125.

Final return

3b

EXTENDED TO NOVEMBER 15, 2021 Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation

Form **990-PF** Department of the Treasury Internal Revenue Service

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.

| For cal | endar year 2020 or tax year beginning | | , and ending | | |
|------------------------|---|------------------------------------|---------------------------|--|---|
| SI | of foundation LVIO AND SALLY J. INGUI C | A Employer identification | | | |
| TR | UST | | | 84-3818432 | |
| | r and street (or P.O. box number if mail is not delivered to street ac | , | Room/suite | B Telephone number | |
| | 00 E DIXILETA DRIVE, UNIT | | | 4806569011 | |
| | r town, state or province, country, and ZIP or foreign po OTTSDALE,AZ 85266 | C If exemption application is po | ending, check here | | |
| G Che | ck all that apply: Initial return | Initial return of a fo | ormer public charity | D 1. Foreign organizations | s, check here |
| | Final return | Amended return | | 0 | |
| | Address change | Name change | | Foreign organizations me check here and attach co | mputation test, |
| H Che | ck type of organization: \mathbf{X} Section 501(c)(3) ex | empt private foundation | | E If private foundation sta | tus was terminated |
| | Section 4947(a)(1) nonexempt charitable trust | Other taxable private founda | tion | under section 507(b)(1) | (A), check here |
| I Fair | market value of all assets at end of year $ig {f J}$ Accountir | ng method: X Cash | Accrual | F If the foundation is in a | 60-month termination |
| • | n Part II, col. (c), line 16) | ner (specify) | _ | under section 507(b)(1) | (B), check here |
| \$ | 1,448,594. (Part I, colum | ın (d), must be on cash basi | (S.) | | 1 |
| Part | Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).) | (a) Revenue and expenses per books | (b) Net investment income | (c) Adjusted net income | (d) Disbursements for charitable purposes (cash basis only) |
| | 1 Contributions, gifts, grants, etc., received | 608,653. | | N/A | |
| : | 2 Check if the foundation is not required to attach Sch. B | | | | |
| ; | Interest on savings and temporary cash investments | 4. | 4. | | STATEMENT 1 |
| 4 | 4 Dividends and interest from securities | 9,709. | 9,709. | | STATEMENT 2 |
| | 5a Gross rents | | | | |
| | b Net rental income or (loss) | | | | |
| o (| Net gain or (loss) from sale of assets not on line 10 | -596,358. | | | |
| ž | 6a Net gain or (loss) from sale of assets not on line 10 Gross sales price for all assets on line 6a 2,268. | | | | |
| | 7 Capital gain net income (from Part IV, line 2) | | 0. | | |
| ؛ ۳ | 8 Net short-term capital gain | | | | |
| ! | 9 Income modifications Gross sales less returns | | | | |
| 10 | Da and allowances | | | | |
| | b Less: Cost of goods sold | | | | |
| | c Gross profit or (loss) | | | | |
| 1 | | 22 000 | 0 712 | | |
| 11 | 9 | 22,008. | 9,713. 0. | | 0. |
| 13 | | 0. | U • | | 0. |
| 14 | 1 3 | | | | |
| ν 1 | 5 Pension plans, employee benefits 6a Legal fees STMT 3 | 14,465. | 0. | | 14,465. |
| use '' | b Accounting fees STMT 4 | 2,000. | 200. | | 1,800. |
| <u>D</u> | c Other professional fees | 2,000 | 2001 | | 1,000. |
| Administrative Expense | | 494. | 494. | | 0. |
| ative | | 4 24 € | 474¢ | | • |
| istra | | | | | |
| iul | | | | | |
| 된 2 | | | | | |
| due 2 | | | | | |
| E 2 | ~ | 260. | 0. | | 260. |
| <u>الله</u> 2 | | | | | |
| Operating 5 5 5 | expenses. Add lines 13 through 23 | 17,219. | 694. | | 16,525. |
| ŏ 2 | | 13,450. | | | 13,450. |
| 20 | 6 Total expenses and disbursements. | | | | |
| | Add lines 24 and 25 | 30,669. | 694. | | 29,975. |
| 2 | 7 Subtract line 26 from line 12: | | | | |
| | a Excess of revenue over expenses and disbursements | -8,661. | | | |
| | b Net investment income (if negative, enter -0-) | | 9,019. | | |
| | c Adjusted net income (if negative, enter -0-) | | | N/A | |

023501 12-02-20 LHA For Paperwork Reduction Act Notice, see instructions.

TRUST Form 990-PF (2020)

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| D | Part II Balance Sheets Attached schedules and amounts in the description Beginning of year End of your solute and amounts in the description Beginning of year End of your solute and the | | f year | | |
|-----------------|---|--|--------------------|----------------|---------------------------|
| | ai t | column should be for end-of-year amounts only. | (a) Book Value | (b) Book Value | (c) Fair Market Value |
| | 1 | Cash - non-interest-bearing | -150. | 55,874. | 55,874. |
| | 2 | Savings and temporary cash investments | | | |
| | | 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 | | | |
| | 7 | Other notes and loans receivable | | | |
| | | Less: allowance for doubtful accounts | | | |
| Ŋ | 8 | Inventories for sale or use | | | |
| Assets | 9 | Prepaid expenses and deferred charges | | | |
| ğ | | Investments - U.S. and state government obligations | | | |
| | b | Investments - corporate stock STMT 6 | 302,912. | 711,474. | 1,392,720. |
| | | Investments - corporate bonds | | | |
| | | Investments - land, buildings, and equipment: basis 🕨 | | | |
| | | Less: accumulated depreciation | | | |
| | 12 | Investments - mortgage loans | | | |
| | 13 | Investments - other | | | |
| | 14 | Land, buildings, and equipment: basis ▶ | | , | |
| | | Less: accumulated depreciation | | | |
| | 15 | Other assets (describe) | | | |
| | 16 | Total assets (to be completed by all filers - see the | | | |
| | | instructions. Also, see page 1, item I) | 302,762. | 767,348. | 1,448,594. |
| | 17 | Accounts payable and accrued expenses | | | |
| | 18 | Grants payable | | | |
| Ş | 19 | Deferred revenue | | | |
| Liabilitie | 20 | Loans from officers, directors, trustees, and other disqualified persons | | | |
| iabi | | Mortgages and other notes payable | | | |
| | 22 | Other liabilities (describe ► MARGIN LOAN | 0. | 473,247. | |
| | | | | | |
| | 23 | Total liabilities (add lines 17 through 22) | 0. | 473,247. | |
| | | Foundations that follow FASB ASC 958, check here ➤ X | | | |
| S | | and complete lines 24, 25, 29, and 30. | | | |
| Š | 24 | Net assets without donor restrictions | 302,762. | 294,101. | |
| 3ala | 25 | Net assets with donor restrictions | | | |
| or Fund Balance | | Foundations that do not follow FASB ASC 958, check here 🕨 🗌 | | | |
| Ξ | | and complete lines 26 through 30. | | | |
| | | Capital stock, trust principal, or current funds | | | |
| ets | 27 | Paid-in or capital surplus, or land, bldg., and equipment fund | | | |
| Ass | 28 | Retained earnings, accumulated income, endowment, or other funds \dots | 222 762 | 224 424 | |
| Net Assets | 29 | Total net assets or fund balances | 302,762. | 294,101. | |
| z | | | 200 760 | 767 240 | |
| | 30 | Total liabilities and net assets/fund balances | 302,762. | 767,348. | |
| P | art | Analysis of Changes in Net Assets or Fund Ba | lances | | |
| 1 | Total | net assets or fund balances at beginning of year - Part II, column (a), line | 29 | | |
| | (mus | 302,762. | | | |
| | • | amount from Part I, line 27a | 1 2 | -8,661. | |
| | | r increases not included in line 2 (itemize) | 0. | | |
| | | lines 1, 2, and 3 | | | 294,101. |
| 5 | Decr | eases not included in line 2 (itemize) 🕨 | | 5 | 0. |
| 6 | Total | net assets or fund balances at end of year (line 4 minus line 5) - Part II, co | olumn (b), line 29 | 6 | 294,101. |
| | | | | | Form 990-PF (2020) |

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| Part IV Capital Gains a | and Losses for Tax on Inv | estment Income | SEE | ATTACI | HED ST | PATEME | |
|--|--|---|-----------------|----------------------------------|---------------------------------------|--------------------------------|----------------------------------|
| | the kind(s) of property sold (for exam rehouse; or common stock, 200 shs. | | | v acquired urchase onation | (c) Date a | acquired | (d) Date sold (mo., day, yr.) |
| 1a | 10110400, 01 0011111011 010011, 200 01101 | | D-L | Jonation | | 3,3 , | . , ,,,, |
| b | | | | | | | |
| C | | | | | | | |
| d | | | | | | | |
| e | | | | | | | |
| (e) Gross sales price | (f) Depreciation allowed (or allowable) | (g) Cost or other basis plus expense of sale | | | | ain or (loss) s (f) minus (| |
| a | | | | | | | |
| b | | | | | | | |
| С | | | | | | | |
| d | | | | | | | 506 250 |
| e 2,268. | | | 91. | | | | -596,358. |
| Complete only for assets showing | g gain in column (h) and owned by th | | | C | (I) Gains (C ol. (k), but n | ol. (h) gain | minus |
| (i) FMV as of 12/31/69 | (j) Adjusted basis as of 12/31/69 | (k) Excess of col. (i) over col. (j), if any | | | Losses | (from col. (I | 1)) |
| a | | | | \leftarrow | | | |
| b | | | -4- | | | | |
| C | | | \rightarrow | | | | |
| d | | | | | | | -596,358. |
| e | | | 3 | Т | | | -390,330. |
| 2 Capital gain net income or (net cap | If gain, also enter | | | , | | | -596,358. |
| , , , | | | | - | | | 330,330. |
| 3 Net short-term capital gain or (loss | s) as defined in sections 1222(5) and column (c). See instructions. If (loss | | | | | | |
| Part I, line 8 | colullii (c). See ilistructions. Ii (loss |), eiitei -0- iii | } 3 | 3 | | N/A | |
| Part V Qualification Ur | nder Section 4940(e) for I | Reduced Tax on Net | Invest | ment Inc | ome | | |
| SECTIO | ON 4940(e) REPEALED O | N DECEMBER 20, 20 |)19 - D | O NOT C | OMPLE | TE. | |
| 1 Reserved | | | | | | | |
| (a) Reserved | (b) Reserved | | (c) Reserved | | | Re | (d) served |
| Reserved | | | | | | | |
| Reserved | | | | | | | |
| Reserved | | | | | | | |
| Reserved | | | | | | | |
| Reserved | | | | | | | |
| 2 Reserved | | | | | 2 | | |
| | | | | | 3 | | |
| 3 Reserved | | | | | | | |
| 4 Reserved | | | | | . 4 | | |
| 5 Reserved | | | | | . 5 | | |
| 6 Reserved | | | | | . 6 | | |
| 7 Reserved | | | | | . 7 | | |
| | | | | | . 8 | | |
| | | | | | • | F | orm 990-PF (2020) |

| Form | 990-PF (2020) TRUST | | | | 381843 | 2 | Page 4 |
|------|---|----------------------------------|----------|-------|------------------|----|--|
| Pa | rt VI Excise Tax Based on Investment Income (Section 4940(a | a), 4940(b), or 4948 | see | instr | uctions) | | |
| 1a | Exempt operating foundations described in section 4940(d)(2), check here and enter | er "N/A" on line 1. | 7 | | | | |
| | Date of ruling or determination letter: (attach copy of letter if neces | ssary-see instructions) | | | | | |
| b | Reserved | | \ | 1 | | : | <u> 125.</u> |
| | All other domestic foundations enter 1.39% of line 27b. Exempt foreign organizations, enter 4% | | | | | | |
| | of Part I, line 12, col. (b) | | J | | | | |
| 2 | Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; other | rs, enter -0-) | | 2 | | | 0. |
| 3 | Add lines 1 and 2 | | | 3 | | : | 125. |
| 4 | Subtitle A (income) tax (domestic section $4947(a)(1)$ trusts and taxable foundations only; other | | | 4 | | | 0. |
| 5 | Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- | | | 5 | | | 125. |
| 6 | Credits/Payments: | 1 | _ | | | | |
| | 2020 estimated tax payments and 2019 overpayment credited to 2020 | 6a | 0. | | | | |
| | Exempt foreign organizations - tax withheld at source | 6b | 0. | | | | |
| | 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 | | | 0. |
| 8 | Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attach | | | 8 | | | 0. |
| 9 | Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed | | | 9 | | | 125. |
| 10 | Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid | | | 10 | | | |
| 11 | Enter the amount of line 10 to be: Credited to 2021 estimated tax | Refunde | ed 🖊 | 11 | | | |
| | rt VII-A Statements Regarding Activities | | | | | 1. | -181- |
| 1a | During the tax year, did the foundation attempt to influence any national, state, or local legislate | | | | | Ye | s No |
| | any political campaign? | | | | | | <u> X</u> |
| b | Did it spend more than \$100 during the year (either directly or indirectly) for political purposes | | e defini | tion | 1 |) | X |
| | 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. | | | | | | |
| | Did the foundation file Form 1120-POL for this year? | | | | 1 | ; | <u> </u> |
| d | Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year | | _ | | | | |
| | (1) On the foundation. \blacktriangleright \$ (2) On foundation managers. | | 0. | | | | |
| е | Enter the reimbursement (if any) paid by the foundation during the year for political expenditure | re tax imposed on foundatior | | | | | |
| | managers. ► \$0. | _ | | | | | 77 |
| 2 | Has the foundation engaged in any activities that have not previously been reported to the IRS | ;? | | | 2 | | <u> </u> |
| _ | If "Yes," attach a detailed description of the activities. | | | | | | |
| 3 | Has the foundation made any changes, not previously reported to the IRS, in its governing ins | | | | | | 37 |
| | | | | | | _ | $\frac{\mathbf{x}}{\mathbf{x}}$ |
| | Did the foundation have unrelated business gross income of \$1,000 or more during the year? | | | | | | +^- |
| | If "Yes," has it filed a tax return on Form 990-T for this year? | | | | | | +x |
| Ð | Was there a liquidation, termination, dissolution, or substantial contraction during the year? | | | | 5 | | + |
| | If "Yes," attach the statement required by <i>General Instruction T</i> . Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either | or: | | | | | |
| 6 | By language in the governing instrument, or | ti. | | | | | |
| | By state legislation that effectively amends the governing instrument so that no mandatory of | directions that conflict with th | a ctata | law | | | |
| | | | | | 6 | х | |
| 7 | Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complet | | | | | | + |
| ' | The the foundation have at least 40,000 in assets at any time during the year: if 103, complete | to rait ii, coi. (c), and rait X | v | | ······· <u> </u> | | |
| g a | Enter the states to which the foundation reports or with which it is registered. See instructions | . • | | | | | |
| υa | AZ | | | | | | |
| h | If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Atto | orney General (or designate) | | | | | |
| | of each state as required by General Instruction G? If "No," attach explanation | | | | 81 | Х | |
| 9 | Is the foundation claiming status as a private operating foundation within the meaning of secti | | | | | | |
| ٠ | year 2020 or the tax year beginning in 2020? See the instructions for Part XIV. If "Yes," complete | | | | 9 | | х |
| 10 | Did any nersons become substantial contributors during the tax year? If "yes " attach a schedule l | | | | | | |

| Pa | rt VII-A Statements Regarding Activities (continued) | | | |
|----|--|---------------|----------|--------------|
| | · , , | | Yes | No |
| 11 | At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of | | | |
| | section 512(b)(13)? If "Yes," attach schedule. See instructions | 11 | | X |
| 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 | | X |
| 13 | Did the foundation comply with the public inspection requirements for its annual returns and exemption application? | | Х | |
| | Website address ► N/A | | - | |
| 14 | The books are in care of ▶ THE FOUNDATION Telephone no.▶ 48065 | 6901 | .1 | |
| | Located at ►8400 E DIXILETA DRIVE, UNIT 192, SCOTTSDALE, AZ ZIP+4 ►8 | 5266 | 5 | |
| 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 | 1 | I/A | |
| 16 | At any time during calendar year 2020, did the foundation have an interest in or a signature or other authority over a bank, | | Yes | No |
| | securities, or other financial account in a foreign country? | 16 | | X |
| | See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the | | | |
| | foreign country | | | |
| Pa | rt 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? | | | |
| | (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) | | | |
| | a disqualified person? Yes X No | | | |
| | (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? | | | |
| | (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes X 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)? | | | |
| | (6) Agree to pay money or property to a government official? (Exception. Check "No" | | | |
| | if the foundation agreed to make a grant to or to employ the official for a period after | | | |
| _ | termination of government service, if terminating within 90 days.) | | | |
| b | If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations | | | |
| | section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions | 1b | | |
| | Organizations relying on a current notice regarding disaster assistance, check here | | | |
| С | Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected | 4. | | x |
| 0 | before the first day of the tax year beginning in 2020? | 1c | | $+^{\Delta}$ |
| 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)); | | | |
| • | At the end of tax year 2020, did the foundation have any undistributed income (Part XIII, lines | | | |
| а | 6d and 6e) for tax year(s) beginning before 2020? Yes X No | | | |
| | If "Yes," list the years | | | |
| h | 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.) N/A | 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. | | | |
| | > | | | |
| 3a | Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time | | | |
| | during the year? $\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \$ | | | |
| b | If "Yes," did it have excess business holdings in 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 Form 4720, | | | |
| | Schedule C, to determine if the foundation had excess business holdings in 2020.) N/A | 3b | | \perp |
| | Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? | 4a | | X |
| 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? | | <u> </u> | X |
| | | orm 99 | U-PF | (2020) |

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| Form 990-PF (2020) TRUST | | | 84-381843 | 32 | Page 6 |
|---|---|-----------------------------|--|-------------------|-------------------|
| Part VII-B Statements Regarding Activities for Which F | orm 4720 May Be R | equired _{(continu} | ued) | | |
| 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 | 1 4945(e))? | Ye | s X No | | |
| (2) Influence the outcome of any specific public election (see section 4955); o | | | | | |
| any voter registration drive? | | | s X No | | |
| (3) Provide a grant to an individual for travel, study, or other similar purposes | | Ye | s X No | | |
| (4) Provide a grant to an organization other than a charitable, etc., organizatio | | | □ | | |
| 4945(d)(4)(A)? See instructions | | Ye | S A NO | | |
| (5) Provide for any purpose other than religious, charitable, scientific, literary, | | | . 🔻 N. | | |
| the prevention of cruelty to children or animals? b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify unit | dar the eventions described i | n Degulations | S A NO | | |
| section 53.4945 or in a current notice regarding disaster assistance? See instru | | | NI/A | ib | |
| Organizations relying on a current notice regarding disaster assistance, check h | 10110113 1979 | | ▶ □ | | |
| c If the answer is "Yes" to question 5a(4), does the foundation claim exemption fi | om the tax hecause it maintai | ined | | | |
| expenditure responsibility for the grant? | | | s 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? | | Ye | s X No | | |
| b Did the foundation, during the year, pay premiums, directly or indirectly, on a p | ersonal benefit contract? | <u> </u> | | b | X |
| If "Yes" to 6b, file Form 8870. | | | | | |
| 7a At any time during the tax year, was the foundation a party to a prohibited tax s | helter transaction? | Ye | s X No | | |
| b If "Yes," did the foundation receive any proceeds or have any net income attribu | table to the transaction? | | N/A | 'b | |
| 8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$ | | | | | |
| excess parachute payment(s) during the year? | | Ye | s X No | | |
| Part VIII Information About Officers, Directors, Truste Paid Employees, and Contractors | es, Foundation Mar | nagers, Highly | | | |
| List all officers, directors, trustees, and foundation managers and the second se | neir compensation. | 7 | | | |
| | (b) Title, and average hours per week devoted | (c) Compensation | (d) Contributions to employee benefit plans and deferred | (e) Ex | pense |
| (a) Name and address | hours per week devoted to position | (If not paid, enter -0-) | and deferred compensation | account allowa | t, other |
| SILVIO INGUI | TRUSTEE | 5 | , | | |
| 8400 EAST DIXILETA DRIVE, LOT 192 | | | | | |
| SCOTTSDALE, AZ 85266 | 1.00 | 0. | 0. | | 0. |
| SALLY INGUI | TRUSTEE | | | | |
| 8400 EAST DIXILETA DRIVE, LOT 192 | | | | | |
| SCOTTSDALE, AZ 85266 | 0.60 | 0. | 0. | | 0. |
| | TRUSTEE | | | | |
| 27 BODIE ROAD | | | | | _ |
| WAYNE, NJ 07470 | 3.00 | 0. | 0. | | 0. |
| | | | | | |
| | | | | | |
| 2 Compensation of five highest-paid employees (other than those inc | luded on line 1). If none. | enter "NONE." | | | |
| | (b) Title, and average hours per week | | (d) Contributions to employee benefit plans and deferred | (e) Ex | pense |
| (a) Name and address of each employee paid more than \$50,000 | hours per week devoted to position | (c) Compensation | and deferred compensation | account allowa | t, other ances |
| NONE | ' | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| Total number of other employees paid over \$50,000 | I | | | | 0 |
| י סיפור העווייטייט סייטיט איני שייטיט שייט שייטיט שייט | | | Form | 990-PF | |

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| Part VIII Information About Officers, Directors, Trustees, Foundation Paid Employees, and Contractors (continued) | ation Managers, Highly | |
|--|---|---------------------------|
| 3 Five highest-paid independent contractors for professional services. If none, enter | er "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 IX-A Summary of Direct Charitable Activities | | ···· · |
| List the foundation's four largest direct charitable activities during the tax year. Include relevant stati number of organizations and other beneficiaries served, conferences convened, research papers pro | istical information such as the duced, etc. | Expenses |
| 1 N/A | | |
| | | |
| 2 | | |
| 3 | | |
| | | |
| 4 | | |
| | | |
| Part IX-B Summary of Program-Related Investments | | |
| Describe the two largest program-related investments made by the foundation during the tax year of | n lines 1 and 2. | Amount |
| 1 N/A | | |
| 2 | | |
| | | |
| All other program-related investments. See instructions. | | |
| 3 | | |
| | | |
| | | |
| Total. Add lines 1 through 3 | > | 0. |
| | | Form 990-PF (2020) |

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| P | art X Minimum Investment Return (All domestic foundations must complete | e this part. Foreign foun | dations, see | e instructions.) |
|----|---|---------------------------|-----------------|---------------------|
| 1 | Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purpose | ıs. | | |
| - | Average monthly fair market value of securities | | 1a | 939,269. |
| | Average of monthly cash balances | | 1b | 939,269. 60,537. |
| | Fair market value of all other assets | | 1c | , |
| | Total (add lines 1a, b, and c) | | 1d | 999,806. |
| | Reduction claimed for blockage or other factors reported on lines 1a and | | | • |
| | 1c (attach detailed explanation) | 0. | | |
| 2 | Acquisition indebtedness applicable to line 1 assets | | 2 | 0. |
| 3 | Subtract line 2 from line 1d | | 3 | 999,806. |
| 4 | Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instruction | | 4 | 14,997. |
| 5 | Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 | , | 5 | 984,809. |
| 6 | Minimum investment return. Enter 5% of line 5 | | 6 | 49,240. |
| P | art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private foreign organizations, check here ▶ ☐ and do not complete this part.) | | d certain | |
| 1 | Minimum investment return from Part X, line 6 | | 1 | 49,240. |
| 2a | Tax on investment income for 2020 from Part VI, line 5 | 125. | | - |
| b | | | | |
| C | Add lines 2a and 2b | | 2c | 125. |
| 3 | Distributable amount before adjustments. Subtract line 2c from line 1 | | 3 | 49,115. |
| 4 | Recoveries of amounts treated as qualifying distributions | | 4 | 0. |
| 5 | Add lines 3 and 4 | | 5 | 49,115. |
| 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 XIII, line 1 | | 7 | 49,115. |
| | Part XII Qualifying Distributions (see instructions) | | | |
| 1 | Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes: | | | 20 075 |
| | Expenses, contributions, gifts, etc total from Part I, column (d), line 26 | | 1a | 29,975. 0. |
| | Program-related investments - total from Part IX-B | | 1b | 0. |
| 2 | Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purpose | es | 2 | |
| 3 | Amounts set aside for specific charitable projects that satisfy the: | | | |
| a | , | | 3a | |
| b | , | | 3b | 20 075 |
| 4 | Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line | 9.4 | 4 | 29,975. |
| 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 | | 5 | 0. |
| 6 | Adjusted qualifying distributions. Subtract line 5 from line 4 | | 6 | 29,975. |
| | Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating 4940(e) reduction of tax in those years. | whether the foundation q | ualifies for th | e section |

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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, | 001740 | Tours prior to 2010 | 2010 | 2020 |
| line 7 | | | | 49,115. |
| 2 Undistributed income, if any, as of the end of 2020: | | | | - , |
| a Enter amount for 2019 only | | | 16,113. | |
| b Total for prior years: | | | , | |
| | | 0. | | |
| 3 Excess distributions carryover, if any, to 2020: | | | | |
| a From 2015 | | | | |
| b From 2016 | | | | |
| c From 2017 | | | | |
| d From 2018 | | | | |
| e From 2019 | | | | |
| f Total of lines 3a through e | 0. | | | |
| 4 Qualifying distributions for 2020 from | | | | |
| Part XII, line 4: ►\$ 29,975. | | | | |
| a Applied to 2019, but not more than line 2a | | | 16,113. | |
| 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 2020 distributable amount | | | | 13,862. |
| e Remaining amount distributed out of corpus | 0. | | | · |
| 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 | 0. | | | 0. |
| indicated below: | | | | |
| a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5 | 0. | | | |
| b Prior years' undistributed income. Subtract | | | | |
| line 4b from line 2b | | 0. | | |
| c Enter the amount of prior years' | | | | |
| undistributed income for which a notice of deficiency has been issued, or on which | | | | |
| the section 4942(a) tax has been previously | | | | |
| assessed | | 0. | | |
| d Subtract line 6c from line 6b. Taxable | | | | |
| amount - see instructions | | 0. | | |
| e Undistributed income for 2019. Subtract line | | | | |
| 4a from line 2a. Taxable amount - see instr | | | 0. | |
| f Undistributed income for 2020. Subtract | | | | |
| lines 4d and 5 from line 1. This amount must | | | | מר מר מר |
| be distributed in 2021 | | | | 35,253. |
| 7 Amounts treated as distributions out of | | | | |
| corpus to satisfy requirements imposed by | | | | |
| section 170(b)(1)(F) or 4942(g)(3) (Election | 0. | | | |
| may be required - see instructions) | U • | | | |
| 8 Excess distributions carryover from 2015 | 0. | | | |
| not applied on line 5 or line 7 | U • | | | |
| 9 Excess distributions carryover to 2021. | 0. | | | |
| Subtract lines 7 and 8 from line 6a | 0. | | | |
| 10 Analysis of line 9: | | | | |
| a Excess from 2016 b Excess from 2017 | | | | |
| c Excess from 2018 | | | | |
| d Excess from 2019 | | | | |
| e Excess from 2020 | | | | |
| € E/10000 HOTH EVEU | | | | |

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| Part XIV Private Operating F | oundations (see in | structions and Part VII- | A, question 9) | N/A | |
|---|--|---|------------------------------|------------------------------|--------------------|
| 1 a If the foundation has received a ruling of | | | | | |
| foundation, and the ruling is effective fo | or 2020, enter the date of | the ruling | ▶ ∟ | | |
| b Check box to indicate whether the foun | dation is a private operatir | ng foundation described ir | section | 4942(j)(3) or 4942(j) | 942(j)(5) |
| 2 a Enter the lesser of the adjusted net | Tax year | | Prior 3 years | | |
| income from Part I or the minimum | (a) 2020 | (b) 2019 | (c) 2018 | (d) 2017 | (e) Total |
| investment return from Part X for | | | | | |
| each year listed | | | | | |
| b 85% of line 2a | | | | | |
| c Qualifying distributions from Part XII, | | | | | |
| 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 | | | | | |
| 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 X, 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 | | | | h = d 05 000 = 11 == = | |
| Part XV Supplementary Info | | | tne foundation | nad \$5,000 or mo | re in assets |
| | | uotions.j | | | |
| 1 Information Regarding Foundation | - | than 00/ of the total combi | | fa | |
| a List any managers of the foundation where year (but only if they have contributed to the foundation). | | | buttons received by the | toundation before the clos | se of any tax |
| SEE STATEMENT 8 | ······································ | | | | |
| b List any managers of the foundation where the best of the best | no own 10% or more of th | e stock of a corporation (c | or an equally large portion | on of the ownership of a pa | artnership or |
| other entity) of which the foundation ha | | | or an equality has go per in | on an and announcemp of a po | a. a |
| NONE | | | | | |
| 2 Information Regarding Contribut | | - · · · · · · · · · · · · · · · · · · · | _ | | |
| Check here X if the foundation the foundation makes gifts, grants, etc. | | | | | ests for funds. If |
| | | | | | |
| a The name, address, and telephone num | iber or email address of th | ne person to whom applica | itions should be address | 6ea: | |
| b The form in which applications should | be submitted and informa | tion and materials they sh | ould include: | | |
| c Any submission deadlines: | | | | | |
| | | | | | |
| d Any restrictions or limitations on award | ıs, sucn as by geographica | aı areas, charıtable fields, l | kinds of institutions, or | otner factors: | |
| | | | | | |

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Supplementary Information (continued) Part XV Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, Recipient show any relationship to Foundation Purpose of grant or Amount any foundation manager status of contribution Name and address (home or business) or substantial contributor recipient a Paid during the year AMERICAN SOCIETY FOR THE PREVENTION ANIMAL RIGHTS UNRESTRICTED OF CRUELTY TO ANIMALS 520 EIGHTH AVENUE, 7TH FLOOR NEW YORK, NY 10018 1,350. HUMANE SOCIETY OF THE US ANIMAL RIGHTS UNRESTRICTED 1255 23RD STREET NW, SUITE 450 WASHINGTON, DC 20037 1,350. SPASTIC PARAPLEGIA FOUNDATION HOSP/HEALTHCARE UNRESTRICTED 1605 GOULARTE PLACE FREMONT, CA 94539 4,500. HONORHEALTH FOUNDATION HOSP/HEALTHCARE UNRESTRICTED 10200 N 92ND STREET, SUITE 150 SCOTTSDALE, AZ 85258 2,000. GLOBALGIVING FOUNDATION UNRESTRICTED FNERAL WELLNESS 1110 VERMONT AVENUE NW, SUITE 550 WASHINGTON, DC 20005 1,000. SEE CONTINUATION SHEET(S) ➤ 3a 13,450. Total **b** Approved for future payment NONE Total

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Part XVI-A Analysis of Income-Producing Activities

| Enter gross amounts unless otherwise indicated. | Unrelate | ed business income | | ded by section 512, 513, or 514 | (e) |
|---|------------------|--------------------|---------------|---------------------------------|-------------------|
| | <u>(a)</u> | (b) | (C) Exclu- | (d) | Related or exempt |
| 1 Program service revenue: | Business code | Amount | sion code | Amount | function income |
| a | | | | | |
| b | | | | | |
| | | | | | |
| d | | | | | |
| e | | | | | |
| f | | | | | |
| g Fees and contracts from government agencies | | | | | |
| 2 Membership dues and assessments | | | | | |
| 3 Interest on savings and temporary cash | | | | | |
| investments | | | 14 | 4. | |
| 4 Dividends and interest from securities | | | 14 | 9,709. | |
| 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 | | | 19 | -596,358. | |
| 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. | | -586,645. | |
| 13 Total. Add line 12, columns (b), (d), and (e) | | 7 | | 13 | -586,645. |
| (See worksheet in line 13 instructions to verify calculations.) | | | | | |

Part XVI-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 XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). |
|---------------|---|
| | |
| | |
| | |
| | |
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| | |
| | |
| | |
| | |
| | |
| | |

Information Regarding Transfers to and Transactions and Relationships With Noncharitable

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TRUST

| | | Exempt Organi | zations | | | | | | | |
|--------------|-----------------|--------------------------------------|----------------------------|------------------|-------------------------------------|-----------------------|----------------------------------|----------------------|-------------|--------|
| 1 | Did the or | ganization directly or indir | ectly engage in any o | f the followin | ng with any other organization | on described in s | section 501(c) | | Yes | No |
| | (other tha | ın section 501(c)(3) organi | zations) or in section | 527, relating | g to political organizations? | | | | | |
| а | Transfers | from the reporting founda | tion to a noncharitab | le exempt orç | ganization of: | | | | | |
| | (1) Cash | | | | | | | 1a(1) | | X |
| | | | | | | | | | | Х |
| b | Other tran | | | | | | | | | |
| | (1) Sales | s of assets to a noncharitab | ole exempt organizati | on | | | | 1b(1) | | X |
| | (2) Purc | hases of assets from a non | charitable exempt or | | | | | | | Х |
| | | | | | | | | | | X |
| | (4) Reim | bursement arrangements | | | | | | 1b(4) | | X |
| | (5) Loan | s or loan guarantees | | | | | | 1b(5) | | X |
| | | ormance of services or mer | | | | | | 41.70 | | X |
| C | Sharing o | f facilities, equipment, mai | ling lists, other asset | s, or paid em | ployees | | | 1c | | X |
| d | If the ans | wer to any of the above is " | 'Yes," complete the fo | ollowing sche | edule. Column (b) should al | ways show the f | air market value of the g | oods, other ass | ets, | |
| | | | | | ed less than fair market valu | ie in any transac | tion or sharing arrangem | nent, show in | | |
| | | d) the value of the goods, o | | | | 1 | | | | |
| a) ∟i | ne no. | (b) Amount involved | (c) Name of | | e exempt organization | (d) Descr | iption of transfers, transaction | ns, and sharing arra | angemer | nts |
| | | | | N/A | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | 1/ | | | | |
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| | | | | | | | | | | |
| 2a | | • | • | | or more tax-exempt organi | | | | | _ |
| | | | | tion 527? | | | | Yes | X | No |
| b | If "Yes," c | omplete the following sche | | | T # 1 | | | | | |
| | | (a) Name of orga | anization | | (b) Type of organization | | (c) Description of re | lationship | | |
| | | N/A | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | | | | | | | | | | |
| | Under | penalties of perjury, I declare th | nat I have examined this r | eturn, including | I accompanying schedules and st | tatements, and to the | ne best of my knowledge | May # IDO | laav ' | hia. " |
| Sig | and b | elief, it is true, correct, and comp | plete. Declaration of prep | arer (other than | taxpayer) is based on all informa | tion of which prepa | rer has any knowledge. | May the IRS of | prepare | er |
| He | re | | | | | TRUS | TEE | shown below? X Yes | | No |
| | Sign | nature of officer or trustee | | | Date | Title | · - · - · - | | | |
| | | Print/Type preparer's nar | me | Preparer's s | | Date | Check if | PTIN | | |
| | | | | | | | self- employed | | | |
| Pa | | DIANE L. CA | APOBIANCO | | | | | P00578 | <u>55</u> 5 | |
| | eparer | Firm's name ► MUR | PHY, MILLI | ER, BA | GLIERI LLP | | Firm's EIN ► 20 | 0-16892 | 74 | |
| Us | e Only | | | | | | | | | _ |
| | | Firm's address ► 65 | | | | | | | | |
| | | GL1 | EN ROCK, 1 | J 074 | 52 | | Phone no. 201 | 1-612-0 | | |
| | | | | | | | | Form 990 |)-PF | (2020) |

Part IV Capital Gains and Losses for Tax on Investment Income (b) How acquired P - Purchase D - Donation (c) Date acquired (mo., day, yr.) (a) List and describe the kind(s) of property sold, e.g., real estate, (d) Date sold 2-story brick warehouse; or common stock, 200 shs. MLC Co. (mo., day, yr.) 1a CALL AAPL MAY 05/22/2005/26/20 b CALL AAPL NOV 10/29/2010/30/20 07/24/2007/27/20 c CALL AAPL AUG CALL AAPL 12/23/2012/24/20 JAN 02/24/2002/25/20 e CALL AAPL FEB CALL AAPL APR 04/06/2004/06/20 g CALL AAPL MAR 03/23/2003/23/20 04/30/2005/01/20 h CALL AAPL MAY CALL AAPL FEB 02/20/2002/21/20 01/31/2002/03/20 CALL AAPL FEB CALL AAPL JUL 07/08/2007/09/20 01/08/09|02/14/20 APPLE, INC m n 0 (g) Cost or other basis (f) Depreciation allowed (h) Gain or (loss) (e) Gross sales price (or allowable) plus expense of sale (e) plus (f) minus (g) -43,481. a -257,400.b 43,514. -202,341.d 18,350. е 8,620. f 10,420. g -19,571.584. 8,562. -165,792.2,268. 91. 2,177. m 0 Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 (I) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), (j) Adjusted basis (k) Excess of col. (i) (i) F.M.V. as of 12/31/69 but not less than "-0-") as of 12/31/69 over col. (j), if any -43,481.a -257,400. b 43,514. -202,341.d 18,350. 8,620. 10,420. -19,571.h 584. 8,562. -165,792. 2,177. m n 2 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 -596,358. 2 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). If (loss), enter "-0-" in Part I, line 8 N/A

Part XV **Supplementary Information** Grants and Contributions Paid During the Year (Continuation) If recipient is an individual, show any relationship to any foundation manager or substantial contributor Recipient Foundation Purpose of grant or Amount status of contribution Name and address (home or business) recipient FOOD ASSISTANCE UNRESTRICTED ST. MARY'S FOOD BANK 2831 N. 31ST AVENUE PHOENIX, AZ 85009 750. LIBERTY WILDLIFE CENTER ANIMAL RIGHTS UNRESTRICTED 2600 E ELMWOOD STREET PHOENIX, AZ 85040 500. EDUCATION UNRESTRICTED CENTER FOR HOPE (HAITI), INC. P.O. BOX 1812 ORINDA, CA 94563 2,000. 3,250. Total from continuation sheets

Schedule B

(Form 990, 990-EZ, or 990-PF)

Department of the Treasury Internal Revenue Service

Schedule of Contributors

➤ Attach to Form 990, Form 990-EZ, or Form 990-PF.

➤ Go to www.irs.gov/Form990 for the latest information.

2020

OMB No. 1545-0047

Name of the organization

SILVIO AND SALLY J. INGUI CHARITABLE TRUST

Employer identification number

84 - 3818432

| 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 | X 501(c)(3) exempt private foundation | | | | |
| | 4947(a)(1) nonexempt charitable trust treated as a private foundation | | | | |
| | 501(c)(3) taxable private foundation | | | | |
| | 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 | | | | | |
| | on filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or y one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions. | | | | |
| Special Rules | | | | | |
| sections 509(a)(1 any one contribu | on described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under 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 tor, 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; Z, 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 (entering "N/A" in column (b) instead of the contributor name and address), 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 | | | | | |
| but it must answer "No" o | 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), n Part IV, line 2, of its Form 990; or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to | | | | |

 $\ \ \, \text{LHA} \ \ \, \text{For Paperwork Reduction Act Notice, see the instructions for Form 990, 990-EZ, or 990-PF.}$

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

Name of organization
SILVIO AND SALLY J. INGUI CHARITABLE
TRUST

84-3818432

Employer identification number

| Part I | Contributors (see instructions). Use duplicate copies of Part I if additional | space is needed. | |
|------------|---|-------------------------|--|
| (a) | (b) | (c) | (d) |
| No. | Name, address, and ZIP + 4 | Total contributions | Type of contribution |
| 1 | SILVIO AND SALLY INGUI 8400 E DIXILETA DRIVE, UNIT 192 SCOTTSDALE, AZ 85266 | \$608,653. | Person Payroll Noncash X (Complete Part II for noncash contributions.) |
| (a) | (b) | (c) | (d) |
| No. | Name, address, and ZIP + 4 | Total contributions | 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) | (b) | (c) | (d) |
| No. | Name, address, and ZIP + 4 | * | Person Payroll Complete Part II for noncash contributions. |
| (a) No. | (b) Name, address, and ZIP + 4 | (c) Total contributions | (d) Type of contribution |
| | Training data coop dita tall 1 1 | \$ | Person Payroll Complete Part II for noncash contributions. |
| (a) | (b) | (c) | (d) |
| No. | Name, address, and ZIP + 4 | Total contributions | Person Payroll Noncash (Complete Part II for noncash contributions.) |

Name of organization
SILVIO AND SALLY J. INGUI CHARITABLE
TRUST

84-3818432

| Part II | Noncash Property (see instructions). Use duplicate copies of Part II if a | dditional space is needed. | |
|------------------------------|---|---|----------------------|
| (a) No. from Part I | (b) Description of noncash property given | (c) FMV (or estimate) (See instructions.) | (d) Date received |
| 1 | 1875 SHARES APPLE INC STOCK | | |
| | | \$608,653. | 01/29/20 |
| (a) No. from Part I | (b) Description of noncash property given | (c) FMV (or estimate) (See instructions.) | (d) Date received |
| | | \$ | |
| (a) No. from Part I | (b) Description of noncash property given | (c) FMV (or estimate) (See instructions.) | (d) Date received |
| | | \$ | |
| (a) No. from Part I | (b) Description of noncash property given | (c) FMV (or estimate) (See instructions.) | (d) Date received |
| | | \$ | |
| (a) No. from Part I | (b) Description of noncash property given | (c) FMV (or estimate) (See instructions.) | (d) Date received |
| | | \$ | |
| (a) No. from Part I | (b) Description of noncash property given | (c) FMV (or estimate) (See instructions.) | (d) Date received |
| | | | |
| | | \$ | |

Name of organization **Employer identification number** SILVIO AND SALLY J. INGUI CHARITABLE TRUST 84-3818432 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 info. once.) Use duplicate copies of Part III if additional space is needed. (a) No. from (b) Purpose of gift (c) Use of gift (d) Description of how gift is held Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (a) No. from (b) Purpose of gift (c) Use of gift (d) Description of how gift is held Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (a) No. from (b) Purpose of gift (c) Use of gift (d) Description of how gift is held Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee (a) No. from (b) Purpose of gift (c) Use of gift (d) Description of how gift is held Part I (e) Transfer of gift Transferee's name, address, and ZIP + 4 Relationship of transferor to transferee

| FORM 990-PF INTERES | ST ON SAVIN | GS AND TEM | IPORARY | CASH IN | VESTMENTS | STATEMENT 1 |
|----------------------|-----------------|------------------------------|---------------------------|-----------------------|-------------------------------|-------------------------------|
| SOURCE | | (<i>P</i> REVE PER E | ENUE | | (B) VESTMENT COME | (C) ADJUSTED NET INCOME |
| INVESTORS BANK | | | 4. | | 4. | |
| TOTAL TO PART I, LII | NE 3 | | 4. | | 4. | |
| FORM 990-PF | DIVIDENDS | AND INTER | REST FRO | M SECUR | ITIES | STATEMENT 2 |
| SOURCE | GROSS AMOUNT | CAPITAI GAINS DIVIDENI | RE | (A) VENUE BOOKS | (B) NET INVES MENT INCO | |
| APPLE, INC | 9,709. | | 0. | 9,709. | 9,70 | <u> </u> |
| TO PART I, LINE 4 | 9,709. | | 0. | 9,709. | 9,70 |)9. |
| | | | | | | |
| FORM 990-PF | | LEGAI | FEES | | | STATEMENT 3 |
| DESCRIPTION | | (A) EXPENSES PER BOOKS | (B NET IN MENT I | VEST- | (C) ADJUSTED NET INCOM | |
| LEGAL FEES | | 14,465. | | 0. | | 14,465. |
| | | | | | | |
| TO FM 990-PF, PG 1, | LN 16A | 14,465. | , = | 0. | | 14,465. === |
| | LN 16A | | | | | |
| TO FM 990-PF, PG 1, | LN 16A | 14,465. | | | | STATEMENT 4 |
| | | | ING FEES | VEST- | (C) ADJUSTED NET INCOM | STATEMENT 4 (D) CHARITABLE |
| FORM 990-PF | | ACCOUNTI (A) EXPENSES | ING FEES (B NET IN MENT I | VEST- | ADJUSTED | STATEMENT 4 (D) CHARITABLE |

| FORM 990-PF | OTHER EXPENSES S | | | TATEMENT 5 |
|-----------------------------|------------------------------|-----------------------------------|-------------------------------|-------------------------------|
| DESCRIPTION | (A) EXPENSES PER BOOKS | (B) NET INVEST- MENT INCOME | (C) ADJUSTED NET INCOME | (D) CHARITABLE PURPOSES |
| BANK FEES | 260. | 0. | | 260. |
| TO FORM 990-PF, PG 1, LN 23 | 260. | 0. | | 260. |

| FORM 990-PF CORPORATE STOCK | | STATEMENT 6 |
|--|------------|----------------------|
| DESCRIPTION | BOOK VALUE | FAIR MARKET VALUE |
| APPLE INC (NET OF OPTIONS OF -200,091 (COST) AND -199,560 (FMV)) | 711,474. | 1,392,720. |
| TOTAL TO FORM 990-PF, PART II, LINE 10B | 711,474. | 1,392,720. |

| FORM 990-PF | LIST OF SUBSTANTIAL CONTRIBUTORS PART VII-A, LINE 10 | STATEMENT 7 |
|----------------------|--|-------------|
| NAME OF CONTRIBUTOR | ADDRESS | |
| SILVIO & SALLY INGUI | 8400 E DIXILETA DRIVE, UNI SCOTTSDALE, AZ 85266 | Т 192 |

FORM 990-PF PART XV - LINE 1A STATEMENT 8
LIST OF FOUNDATION MANAGERS

NAME OF MANAGER

SILVIO INGUI SALLY INGUI