

Form **990-PF**

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

OMB No. 1545-0047

2020

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.

Open to Public Inspection

For calendar year 2020 or tax year beginning , and ending

Name of foundation Howard Family Foundation, Inc. c/o Sally Thomas		A Employer identification number 16-1589334
Number and street (or P.O. box number if mail is not delivered to street address) 2645 W. Marion Ave., #312	Room/suite	B Telephone number (see instructions) 941-787-4534
City or town, state or province, country, and ZIP or foreign postal code Punta Gorda FL 33950		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) u \$ 493,325	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)				
	2 Check u <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	1	1	1	
	4 Dividends and interest from securities	6,870	6,870	6,870	
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10 Stmt 1	15,573			
	b Gross sales price for all assets on line 6a 41,410				
	7 Capital gain net income (from Part IV, line 2)		1,079		
	8 Net short-term capital gain			0	
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less: Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule)					
12 Total. Add lines 1 through 11	22,444	7,950	6,871		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	0			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule) Stmt 2	2,475	2,475	2,475	
	c Other professional fees (attach schedule) Stmt 3	2,078	2,078	2,078	
	17 Interest				
	18 Taxes (attach schedule) (see instructions) Stmt 4	137	137	137	
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (att. sch.) Stmt 5	500	500	500	
	24 Total operating and administrative expenses. Add lines 13 through 23	5,190	5,190	5,190	0
	25 Contributions, gifts, grants paid	21,250			21,250
26 Total expenses and disbursements. Add lines 24 and 25	26,440	5,190	5,190	21,250	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	-3,996				
b Net investment income (if negative, enter -0-)		2,760			
c Adjusted net income (if negative, enter -0-)			1,681		

For Paperwork Reduction Act Notice, see instructions.

Form **990-PF** (2020)

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	10,214	8,941	8,941
	2 Savings and temporary cash investments			
	3 Accounts receivable u			
	Less: allowance for doubtful accounts u			
	4 Pledges receivable u			
	Less: allowance for doubtful accounts u			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (att. schedule) u			
	Less: allowance for doubtful accounts u	0		
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments – U.S. and state government obligations (attach schedule)			
	b Investments – corporate stock (attach schedule)			
	c Investments – corporate bonds (attach schedule)			
	11 Investments – land, buildings, and equipment: basis u			
Less: accumulated depreciation (attach sch.) u				
12 Investments – mortgage loans				
13 Investments – other (attach schedule) See Statement 6	164,753	162,030	484,384	
14 Land, buildings, and equipment: basis u				
Less: accumulated depreciation (attach sch.) u				
15 Other assets (describe u)				
16 Total assets (to be completed by all filers – see the instructions. Also, see page 1, item I)	174,967	170,971	493,325	
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 u)			
	23 Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here and complete lines 24, 25, 29, and 30. u <input checked="" type="checkbox"/>			
	24 Net assets without donor restrictions	174,967	170,971	
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here and complete lines 26 through 30. u <input type="checkbox"/>			
	26 Capital stock, trust principal, or current funds			
	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)	174,967	170,971		
30 Total liabilities and net assets/fund balances (see instructions)	174,967	170,971		

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	174,967
2 Enter amount from Part I, line 27a	2	-3,996
3 Other increases not included in line 2 (itemize) u	3	
4 Add lines 1, 2, and 3	4	170,971
5 Decreases not included in line 2 (itemize) u	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 29	6	170,971

Part IV Capital Gains and Losses for Tax on Investment Income

	(b) How acquired P – Purchase D – Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a Capital Gain Distribution			
b			
c			
d			
e			
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 1,079			1,079
b			
c			
d			
e			
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			1,079
b			
c			
d			
e			
2 Capital gain net income or (net capital loss)	<input type="checkbox"/> If gain, also enter in Part I, line 7 <input type="checkbox"/> If (loss), enter -0- in Part I, line 7		2 1,079
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). See instructions. If (loss), enter -0- in Part I, line 8			3

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income
SECTION 4940(e) REPEALED ON DECEMBER 20, 2019 – DO NOT COMPLETE.

1 Reserved			
(a) Reserved	(b) Reserved	(c) Reserved	(d) Reserved
Reserved			
Reserved			
Reserved			
Reserved			
Reserved			
2 Reserved			2
3 Reserved			3
4 Reserved			4
5 Reserved			5
6 Reserved			6
7 Reserved			7
8 Reserved			8

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

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: (attach copy of letter if necessary—see instructions)		
b	Reserved	1	38
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	0
3	Add lines 1 and 2	3	38
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-)	4	0
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	38
6	Credits/Payments:		
a	2020 estimated tax payments and 2019 overpayment credited to 2020	6a	
b	Exempt foreign organizations – tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed u	9	38
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid u	10	
11	Enter the amount of line 10 to be: Credited to 2021 estimated tax u Refunded u	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition 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.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. u \$ _____ (2) On foundation managers. u \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. u \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year? N/A		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by <i>General Instruction T</i> .		X
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?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered. See instructions. u NY		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by <i>General Instruction G</i> ? If "No," attach explanation	X	
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 tax year beginning in 2020? See instructions for Part XIV. If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

Part 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		<input checked="" type="checkbox"/>
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		<input checked="" type="checkbox"/>
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address u www.howardfamilyfoundation.org	<input checked="" type="checkbox"/>	
14	The books are in care of u Sally C. Thomas Telephone no. u 941-787-4534 2645 W. Marion Ave. #312 Located at u Punta Gorda FL ZIP+4 u 33950		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 – check here <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year u 15		
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? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country u		<input checked="" type="checkbox"/>

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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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 u <input type="checkbox"/>	N/A	1b
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? N/A	N/A	1c
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 (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2020? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years u 20 , 20 , 20 , 20		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement – see instructions.) N/A	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. u 20 , 20 , 20 , 20		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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 Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2020.) N/A	N/A	3b
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		<input checked="" type="checkbox"/>
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?		<input checked="" type="checkbox"/>

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		u

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 N/A	
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 N/A	
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	448,385
b	Average of monthly cash balances	1b	9,578
c	Fair market value of all other assets (see instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	457,963
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	457,963
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	6,869
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	451,094
6	Minimum investment return. Enter 5% of line 5	6	22,555

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	22,555
2a	Tax on investment income for 2020 from Part VI, line 5	2a	38
b	Income tax for 2020. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	38
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	22,517
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	22,517
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	22,517

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	21,250
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	21,250
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	21,250

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				22,517
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				
b From 2016				
c From 2017				
d From 2018				
e From 2019				
f Total of lines 3a through e				
4 Qualifying distributions for 2020 from Part XII, line 4: u \$ 21,250				
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)				
d Applied to 2020 distributable amount				21,250
e Remaining amount distributed out of corpus				
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				
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 2020. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2021				1,267
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)				
9 Excess distributions carryover to 2021. Subtract lines 7 and 8 from line 6a				
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				

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
WSMR FM 89.1 Public Media PO Box 917134 Orlando FL 32891-7134	N/A	NC Support	Operations	500
WGPU FM 90.1 NPR 10501 FGCU Blvd. S. Fort Myers FL 33965	N/A	NC Support	Operations	500
Univ. of Co Leeds Bus. Sch. 995 Regent Dr. Boulder CO 80309	N/A	NC	Support	500
Tahoe Lake Elementary School PTO P.O. Box 856 Lake Tahoe CA 96145	N/A	NC Support	Operations	750
St. Jude Childrens Research Hospita 262 Danny Thomas Pl. Memphis TN 38105	N/A	NC	Support	1,500
Punta Gorda Isles Civic Assoc. 2001 Shreve St Punta Gorda FL 33950	N/A	NC Support	Operations	500
Peoria Symphony Orchestra 203 Harrison Street Peoria IL 61602	N/A	NC Support	Operations	1,500
Parish of St. John the Evangelist 172 Main Street Hingham MA 02043	N/A	NC Support	Operations	1,000
North Tahoe School PTO 2945 Polaris Rd, Tahoe City CA 96145	N/A	NC	Support	750
IVY Boating Foundation 5102 N Galina Rd. Peoria Heights IL 61614	N/A	NC Support	Operations	500
Total			u 3a	21,250
b Approved for future payment				
N/A				
Total			u 3b	

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i>				
Hingham Maritime Center, Inc. P.O. Box 492 Hingham MA 02043	N/A	NC	Support Operations	1,500
Hingham Education P.O. Box 10 Hingham MA 02043	N/A	NC	Support Operations	500
Delta Gamma Foundation 3250 Riverside Dr. Columbus OH 43221	N/A	NC	Support Operations	500
Crossroads Hope Academy 45991 Bermont Rd Punta Gorda FL 33982	N/A	NC	Support Operations	1,000
Colby - Sawyer College 541 Main St New London NH 03257	N/A	NC	Support Operations	250
Clay Soper Memorial Fund 233 Main St Winchester MA 01890	N/A	NC	Support Operations	500
Charlotte Community Foundation 227 Sullivan St. Punta Gorda FL 33950	N/A	NC	Support Operations	1,500
Central Illinois Landmark Foundatio 416 Hamilton Blvd. Peoria IL 61602	N/A	NC	Support	500
Black Oak Lake Preservation Foundat P.O. Box 151 Land O'Lakes WI 54540	N/A	NC	Support Operations	500
Alzheimer's Assoc. - W. Central FL 227 Sullivan St., #125 Punta Gorda FL 33950	N/A	NC	Support Operations	1,500
Total			u 3a	
b <i>Approved for future payment</i>				
N/A				
Total			u 3b	

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i> American Red Cross SW FL 1777 Tamiami Trail Port Charlotte FL 33948	N/A	NC Supporting	Operations	3,000
American Cancer Society P.O. Box 22478 Oklahoma City OK 73123	N/A	NC Supporting	Operations	1,000
Soc of St. Vincent De Pau 2323 N. Dizie Hwy Pompano Beach FL 33060	N/A	NC Supporting	Operations	1,000
Total			u 3a	
b <i>Approved for future payment</i> N/A				
Total			u 3b	

Federal Statements

Statement 1 - Form 990-PF, Part I, Line 6a - Sale of Assets

Description	How Received		Sale Price	Cost	Expense	Depreciation	Net Gain / Loss
	Whom Sold	Date Acquired					
Blackrock Sh Obligations Inst			Purchase				
	9/30/20	10/12/20	\$ 22,034	\$ 22,034	\$	\$	\$
Home Depot Inc.			Purchase				
	1/17/06	10/12/20	2,014	293			1,721
JPMorgan Chase & Co			Purchase				
	7/02/08	10/12/20	2,034	709			1,325
Vanguard Info Tech ETF			Purchase				
	1/05/10	7/06/20	14,249	2,801			11,448
Total			\$ 40,331	\$ 25,837	\$ 0	\$ 0	\$ 14,494

Statement 2 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Accounting fees	\$ 2,475	\$ 2,475	\$ 2,475	\$
Total	\$ 2,475	\$ 2,475	\$ 2,475	\$ 0

Statement 3 - Form 990-PF, Part I, Line 16c - Other Professional Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Indirect Other Professional Fees	\$ 2,078	\$ 2,078	\$ 2,078	\$
Total	\$ 2,078	\$ 2,078	\$ 2,078	\$ 0

Federal Statements

Statement 4 - Form 990-PF, Part I, Line 18 - Taxes

<u>Description</u>	<u>Total</u>	<u>Net Investment</u>	<u>Adjusted Net</u>	<u>Charitable Purpose</u>
NYS fee	\$ 137	\$ 137	\$ 137	\$
Total	\$ 137	\$ 137	\$ 137	\$ 0

Statement 5 - Form 990-PF, Part I, Line 23 - Other Expenses

<u>Description</u>	<u>Total</u>	<u>Net Investment</u>	<u>Adjusted Net</u>	<u>Charitable Purpose</u>
Expenses	\$	\$	\$	\$
Website maintenance	500	500	500	
Total	\$ 500	\$ 500	\$ 500	\$ 0

Statement 6 - Form 990-PF, Part II, Line 13 - Other Investments

<u>Description</u>	<u>Beginning of Year</u>	<u>End of Year</u>	<u>Basis of Valuation</u>	<u>Fair Market Value</u>
Investments	\$ 164,753	\$ 162,030	Market	\$ 484,384
Total	\$ 164,753	\$ 162,030		\$ 484,384

Form 990-PF	Underdistribution and Excess Distributions for Part XIII		2020
For calendar year 2020, or tax year beginning _____, ending _____			

Name Howard Family Foundation, Inc. c/o Sally Thomas	Employer Identification Number 16-1589334
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Undistributed Income Carryovers

Form 990-PF, Part XIII

Tax Year	Prior Undistributed Income			Current Year Decreases	Next Year Carryover	
	Nontaxable or Previously Taxed	Taxable in 2020	Total per Year		Nontaxable or Previously Taxed	Taxable in 2021
Years prior						
20 16						
20 17						
20 18						
2019						
2020			22,517	21,250		1,267
Total Carryover to Next Year						1,267

* Carryover amount includes 4942(a) amounts

Excess Distribution Carryovers

Form 990-PF, Part XIII

Preceding Tax Year Excess Distributions	Current Year	Next Year
	Decreases	Carryover
2015		
2016		
2017		
2018		
2019		
Current Year Excess Distribution Generated (2020)		0
Total Carryover to Next Year		0

Form 990PF	Two Year Comparison Report	2019 & 2020
For calendar year 2020, or tax year beginning _____, ending _____		

Name **Howard Family Foundation, Inc.** c/o **Sally Thomas** Taxpayer Identification Number **16-1589334**

	2019		2020		Differences	
	Revenue and expenses per books	Net investment income	Revenue and expenses per books	Net investment income	Revenue and expenses per books	Net investment income
Revenue						
1. Contributions, gifts, grants, and similar amounts received						
2. Interest on savings and temporary cash investments	7	7	1	1	-6	-6
3. Dividends and interest from securities	6,916	6,916	6,870	6,870	-46	-46
4. Gross rents						
5. Net gain or (loss) from sale of assets	279		15,573		15,294	
6. Capital gain net income				1,079		1,079
7. Gross profit or (loss)						
8. Other income						
9. Total. Add lines 1 through 8	7,202	6,923	22,444	7,950	15,242	1,027
Expenses & Deductions						
10. Compensation of officers, directors, trustees, etc.						
11. Other employee salaries and wages						
12. Pension plans, employee benefits						
13. Professional fees	2,665	2,665	4,553	4,553	1,888	1,888
14. Interest						
15. Taxes	100	100	137	137	37	37
16. Depreciation and depletion						
17. Occupancy						
18. Other expenses	500	500	500	500		
19. Contributions, gifts, grants paid	17,500		21,250		3,750	
20. Total expenses and disbursements. Add lines 10 through 19	20,765	3,265	26,440	5,190	5,675	1,925
21. Net income (if negative investment activity, enter -)	-13,563	3,658	-3,996	2,760	9,567	-898
Taxes						
22. Excise Tax		37		38		1
23. Section 511 Tax						
24. Subtitle A income tax						
25. Total Taxes		37		38		1
Due / Refund						
26. Estimates and overpayments credited						
27. Foreign tax withheld						
28. Other Payments		37				-37
29. Total payments and credits		37				-37
30. Balance due / (Overpayment)		0		38		38
31. Overpayment credited to next year						
32. Penalty						
33. Net due / (Refund)		0		38		38
Other						
34. Total assets	174,967		170,971		0	
35. Total liabilities	0		0		0	
36. Net assets	174,967		170,971		0	

Form 990PF	Tax Return History	2020
Use the 2Yr Report for more recent historical information		

Name **Howard Family Foundation, Inc.** Taxpayer Identification Number **16-1589334**
c/o Sally Thomas

	2016		2017		2018	
	Revenue and expenses per books	Net investment income	Revenue and expenses per books	Net investment income	Revenue and expenses per books	Net investment income
Revenue						
1. Contributions, gifts, grants, and similar amounts received						
2. Interest on savings and temporary cash investments	2	2	3	3	12	12
3. Dividends and interest from securities	5,681	5,681	7,110	7,110	7,013	7,013
4. Gross rents						
5. Net gain or (loss) from sale of assets	-443		4,199		2,319	
6. Capital gain net income		41		1,632		1,940
7. Gross profit or (loss)						
8. Other income	58	58	58	58		
9. Total. Add lines 1 through 8	5,298	5,782	11,370	8,803	9,344	8,965
Expenses & Deductions						
10. Compensation of officers, directors, trustees, etc.						
11. Other employee salaries and wages						
12. Pension plans, employee benefits						
13. Professional fees	5,253	5,253	4,972	4,972	2,255	2,255
14. Interest						
15. Taxes	108	108	107	107	100	100
16. Depreciation and depletion						
17. Occupancy						
18. Other expenses			1,000	1,000	500	500
19. Contributions, gifts, grants paid	11,700		15,238		17,250	
20. Total expenses and disbursements. Add lines 10 through 19	17,061	5,361	21,317	6,079	20,105	2,855
21. Net income (if negative investment activity, enter -)	-11,763	421	-9,947	2,724	-10,761	6,110
Taxes						
22. Excise Tax		8		27		61
23. Section 511 Tax						
24. Subtitle A income tax						
25. Total Taxes		8		27		61
Due / Refund						
26. Estimates and overpayments credited		1				
27. Foreign tax withheld						
28. Other Payments						
29. Total payments and credits		1				
30. Balance due / (Overpayment)		7		27		61
31. Overpayment credited to next year						
32. Penalty						
33. Net due / (Refund)		7		27		61
Other						
34. Total assets	209,169		199,203		188,469	
35. Total liabilities	0		0		0	
36. Net assets	209,169		199,203		188,469	

Federal Statements**Taxable Interest on Investments**

<u>Description</u>	<u>Amount</u>	<u>Unrelated Business</u>	<u>Exclusion Code</u>	<u>Postal Code</u>	<u>US Obs (\$ or %)</u>
Morgan Stanley	\$ 1				
Total	\$ 1				

Taxable Dividends from Securities

<u>Description</u>	<u>Amount</u>	<u>Unrelated Business</u>	<u>Exclusion Code</u>	<u>Postal Code</u>	<u>US Obs (\$ or %)</u>
Morgan Stanley	\$ 6,870				
Total	\$ 6,870				