

**2020 Exempt Org. Return**  
prepared for:

**CROSS CHARITABLE FOUNDATION, INC.**  
**ATTN: JOHN R. CLARK**  
3805 VALLEY COMMONS DRIVE Suite #7  
BOZEMAN, MT 59718

**Rudd & Company PLLC**  
3805 Valley Commons Drive, Suite 7  
Bozeman, MT 59718

**RUDD & COMPANY PLLC  
3805 VALLEY COMMONS DRIVE, SUITE 7  
BOZEMAN, MT 59718  
(406) 585-3393**

November 15, 2021

CROSS CHARITABLE FOUNDATION, INC.  
ATTN: JOHN R. CLARK  
3805 VALLEY COMMONS DRIVE Suite #7  
BOZEMAN, MT 59718

Dear Client:

Your 2020 Federal Return of Private Foundation will be electronically filed with the Internal Revenue Service upon receipt of a signed Form 8879-EO - IRS e-file Signature Authorization. No tax is payable with the filing of this return. There is an overpayment of \$37,798, of which \$37,798 has been applied to your 2021 estimated tax.

The organization has undistributed income of \$749,425 on Form 990-PF for the tax year 2020. The organization must distribute this amount by the end of its 2021 tax year so that it will not be liable for the tax on undistributed income.

Please be sure to call us if you have any questions.

Sincerely,

JOHN R CLARK,CPA

Form **8879-EO****IRS e-file Signature Authorization  
for an Exempt Organization**

OMB No. 1545-0047

For calendar year 2020, or fiscal year beginning \_\_\_\_\_, 2020, and ending \_\_\_\_\_, 20\_\_\_\_

▶ **Do not send to the IRS. Keep for your records.**▶ **Go to [www.irs.gov/Form8879EO](http://www.irs.gov/Form8879EO) for the latest information.****2020**Department of the Treasury  
Internal Revenue ServiceName of exempt organization or person subject to tax  
**CROSS CHARITABLE FOUNDATION, INC.**

Taxpayer identification number

**83-0331707**Name and title of officer or person subject to tax  
**JOHN R. CLARK**  
**TREASURER****JOHN R. CLARK****TREASURER****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.

<b>1 a Form 990</b> check here . . . . ▶ <input type="checkbox"/>	<b>b Total revenue</b> , if any (Form 990, Part VIII, column (A), line 12) . . . . .	<b>1 b</b> _____
<b>2 a Form 990-EZ</b> check here . . . . ▶ <input type="checkbox"/>	<b>b Total revenue</b> , if any (Form 990-EZ, line 9) . . . . .	<b>2 b</b> _____
<b>3 a Form 1120-POL</b> check here . . . . ▶ <input type="checkbox"/>	<b>b Total tax</b> (Form 1120-POL, line 22) . . . . .	<b>3 b</b> _____
<b>4 a Form 990-PF</b> check here . . . . ▶ <input checked="" type="checkbox"/>	<b>b Tax based on investment income</b> (Form 990-PF, Part VI, line 5) . . . . .	<b>4 b</b> <u>34,219.</u>
<b>5 a Form 8868</b> check here . . . . ▶ <input type="checkbox"/>	<b>b Balance due</b> (Form 8868, line 3c) . . . . .	<b>5 b</b> _____
<b>6 a Form 990-T</b> check here . . . . ▶ <input type="checkbox"/>	<b>b Total tax</b> (Form 990-T, Part III, line 4) . . . . .	<b>6 b</b> _____
<b>7 a Form 4720</b> check here . . . . ▶ <input type="checkbox"/>	<b>b Total tax</b> (Form 4720, Part III, line 1) . . . . .	<b>7 b</b> _____

**Part II Declaration and Signature Authorization of Officer or Person Subject to Tax**

Under penalties of perjury, I declare that ☒ I am an officer of the above organization or ☐ I am a person subject to tax with respect to (name of organization) \_\_\_\_\_, (EIN) \_\_\_\_\_, and that I have examined a copy 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 IRS (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**

☒ I authorize RUDD & COMPANY PLLC to enter my PIN 38955 as my signature  
ERO firm name Enter five numbers, but do not enter all zeros

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 ▶ \_\_\_\_\_ Date ▶ \_\_\_\_\_

**Part III Certification and Authentication**

**ERO's EFIN/PIN.** Enter your six-digit electronic filing identification number (EFIN) followed by your five-digit self-selected PIN . . . . .

**81172253393**

Do not enter all zeros

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 ▶ JOHN R CLARK, CPA Date ▶ \_\_\_\_\_

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

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

OMB No. 1545-0047

► **File a separate application for each return.**  
 ► **Go to [www.irs.gov/Form8868](http://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 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](http://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.

<b>Type or print</b>  File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions.		Taxpayer identification number (TIN)
	CROSS CHARITABLE FOUNDATION, INC. ATTN: JOHN R. CLARK		83-0331707
	Number, street, and room or suite number. If a P.O. box, see instructions.		
	3805 VALLEY COMMONS DRIVE #7 City, town or post office, state, and ZIP code. For a foreign address, see instructions.		
BOZEMAN, MT 59718			

Enter the Return Code for the return that this application is for (file a separate application for each return) ..... **04**

Application Is For	Return Code	Application Is For	Return 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
Form 990-PF	04	Form 5227	10
Form 990-T (section 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

• The books are in the care of ► JOHN CLARK, CPA

Telephone No. ► (406) 585-3393 Fax No. ► 406-585-3393

• 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.

**1** I request an automatic 6-month extension of time until 11/15, 20 21, to file the exempt organization return for the organization named above. The extension is for the organization's return for:

- ☒ calendar year 20 20 or  
 ► ☐ tax year beginning \_\_\_\_\_, 20 \_\_\_\_, and ending \_\_\_\_\_, 20 \_\_\_\_.

**2** If the tax year entered in line 1 is for less than 12 months, check reason: ☐ Initial return ☐ Final return  
☐ Change in accounting period

<b>3a</b> If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions .....	<b>3a</b>	\$	0.
<b>b</b> 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 .....	<b>3b</b>	\$	0.
<b>c Balance due.</b> Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions .....	<b>3c</b>	\$	0.

**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.

**BAA For Privacy Act and Paperwork Reduction Act Notice, see instructions.**

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

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

▶ Do not enter social security numbers on this form as it may be made public.  
▶ Go to [www.irs.gov/Form990PF](http://www.irs.gov/Form990PF) for instructions and the latest information.

2020

Open to Public Inspection

For calendar year 2020 or tax year beginning

, 2020, and ending

, 20

CROSS CHARITABLE FOUNDATION, INC.  
ATTN: JOHN R. CLARK  
3805 VALLEY COMMONS DRIVE #7  
BOZEMAN, MT 59718

A Employer identification number

83-0331707

B Telephone number (see instructions)

(406) 585-3393

C If exemption application is pending, check here. ▶ ☐D 1 Foreign organizations, check here. . . . . ▶ ☐2 Foreign organizations meeting the 85% test, check here and attach computation . . . . . ▶ ☐E If private foundation status was terminated under section 507(b)(1)(A), check here. . . . . ▶ ☐F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here. . . . . ▶ ☐

G Check all that apply:

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name change

H Check type of organization:

☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, column (c), line 16)

▶ \$ 57,832,153.

J Accounting method: ☒ Cash ☐ Accrual☐ Other (specify) \_\_\_\_\_

(Part I, column (d), must be on cash basis.)

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule). . .	7,239.			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments . . . . .	1,032.	1,032.	1,032.	
	4 Dividends and interest from securities. . . . .	1,056,262.	1,056,262.	1,056,262.	
	5a Gross rents . . . . .	1,000,000.	1,000,000.	1,000,000.	
	b Net rental income or (loss) . . . . .	1,000,000.			
	6a Net gain or (loss) from sale of assets not on line 10. . . . .	991,847.			
	b Gross sales price for all assets on line 6a. . . . .	14,583,219.			
	7 Capital gain net income (from Part IV, line 2) . . . . .		991,847.		
	8 Net short-term capital gain . . . . .			125,237.	
	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. . . . .	3,056,380.	3,049,141.	2,182,531.		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc. . . . .	160,000.	40,000.		120,000.
	14 Other employee salaries and wages. . . . .				
	15 Pension plans, employee benefits . . . . .				
	16a Legal fees (attach schedule) . . . . .				
	b Accounting fees (attach sch) . . . . .	SEE ST. 1	16,036.		16,036.
	c Other professional fees (attach sch) . . . . .	SEE ST. 2	236,819.	221,029.	15,790.
	17 Interest. . . . .				
	18 Taxes (attach schedule)(see instrs). . . . .	SEE STM 3	16,651.	16,651.	
	19 Depreciation (attach schedule) and depletion . . . . .		309,467.	309,467.	
	20 Occupancy. . . . .				
	21 Travel, conferences, and meetings. . . . .				
	22 Printing and publications. . . . .				
	23 Other expenses (attach schedule) . . . . .				
	SEE STATEMENT 4	7,917.	192.		7,725.
	24 Total operating and administrative expenses. Add lines 13 through 23. . . . .	746,890.	587,339.		159,551.
25 Contributions, gifts, grants paid. . . . .	1,720,500.			1,720,500.	
26 Total expenses and disbursements. Add lines 24 and 25. . . . .	2,467,390.	587,339.	0.	1,880,051.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements . . . . .	588,990.				
b Net investment income (if negative, enter -0-) . . . . .		2,461,802.			
c Adjusted net income (if negative, enter -0-) . . . . .			2,182,531.		

Part II Balance Sheets		Beginning of year	End of year	
			(a) Book Value	(b) Book Value
Assets	1 Cash — non-interest-bearing .....			
	2 Savings and temporary cash investments .....	2,001,442.	1,336,958.	1,336,958.
	3 Accounts receivable .....			
	Less: allowance for doubtful accounts .....			
	4 Pledges receivable .....			
	Less: allowance for doubtful accounts .....			
	5 Grants receivable .....			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) .....			
	7 Other notes and loans receivable (attach sch) .....			
	Less: allowance for doubtful accounts .....			
	8 Inventories for sale or use .....			
	9 Prepaid expenses and deferred charges .....			
	10a Investments — U.S. and state government obligations (attach schedule) .....			
	b Investments — corporate stock (attach schedule) .....	36,435,750.	39,405,195.	39,405,195.
	c Investments — corporate bonds (attach schedule) .....			
	11 Investments — land, buildings, and equipment: basis .....			
Liabilities	Less: accumulated depreciation (attach schedule) SEE STMT 5 .....	14,288,991.		
	2,114,259.	11,585,040.	12,174,732.	17,090,000.
	12 Investments — mortgage loans .....			
	13 Investments — other (attach schedule) .....			
	14 Land, buildings, and equipment: basis .....			
	Less: accumulated depreciation (attach schedule) .....			
	15 Other assets (describe .....	483,424.		
	16 Total assets (to be completed by all filers — see the instructions. Also, see page 1, item I) .....	50,505,656.	52,916,885.	57,832,153.
	17 Accounts payable and accrued expenses .....	296,665.		
	18 Grants payable .....			
	19 Deferred revenue .....			
	20 Loans from officers, directors, trustees, & other disqualified persons .....			
	21 Mortgages and other notes payable (attach schedule) .....			
	22 Other liabilities (describe SEE STATEMENT 6 .....		3.	
	23 Total liabilities (add lines 17 through 22) .....	296,665.	3.	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here and complete lines 24, 25, 29, and 30. <input checked="" type="checkbox"/>			
	24 Net assets without donor restrictions .....	50,208,991.	52,916,882.	
	25 Net assets with donor restrictions .....			
	Foundations that do not follow FASB ASC 958, check here and complete lines 26 through 30. <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) .....	50,208,991.	52,916,882.	
	30 Total liabilities and net assets/fund balances (see instructions) .....	50,505,656.	52,916,885.	

## 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	50,208,991.
2	Enter amount from Part I, line 27a. ....	2	588,990.
3	Other increases not included in line 2 (itemize) SEE STATEMENT 7 .....	3	2,118,901.
4	Add lines 1, 2, and 3. ....	4	52,916,882.
5	Decreases not included in line 2 (itemize) .....	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 29 .....	6	52,916,882.

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)		(b) How acquired P — Purchase D — Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1 a SEE STATEMENT 8				
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				
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.			(i) 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				
b				
c				
d				
e				
2 Capital gain net income or (net capital loss)..... <span style="border: 1px solid black; padding: 2px;">If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7</span>			2	991,847.
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..... <span style="border: 1px solid black; padding: 2px;"></span>			3	125,237.

**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	

BAA

Form 990-PF (2020)

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

1 a 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	34,219.
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	34,219.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-).		4	0.
5 <b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-.		5	34,219.
6 Credits/Payments:			
a 2020 estimated tax pymts and 2019 overpayment credited to 2020	6 a	72,221.	
b Exempt foreign organizations — tax withheld at source	6 b		
c Tax paid with application for extension of time to file (Form 8868)	6 c		
d Backup withholding erroneously withheld	6 d		
7 Total credits and payments. Add lines 6a through 6d.	7	72,221.	
8 Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached.	8	204.	
9 <b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b> .	9	0.	
10 <b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b> .	10	37,798.	
11 Enter the amount of line 10 to be: <b>Credited to 2021 estimated tax</b> 37,798. <b>Refunded</b>	11	0.	

**Part VII-A Statements Regarding Activities**

	Yes	No
1 a 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.		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.		
c Did the foundation file <b>Form 1120-POL</b> 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 ▶ \$ 0. (2) On foundation managers ▶ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If 'Yes,' attach a detailed description of the activities.		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
4 a 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 <b>Form 990-T</b> 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	
8 a Enter the states to which the foundation reports or with which it is registered. See instructions WY		
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 the 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

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Form 990-PF (2020)



**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.	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? Website address: CROSSCHARITABLEFOUNDATION.ORG	13	X
14 The books are in care of JOHN CLARK, CPA Telephone no. (406) 585-3393 Located at 3805 VALLEY COMMONS DRIVE, #7 BOZEMAN MT ZIP + 4 59718		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — check here. N/A and enter the amount of tax-exempt interest received or accrued during the year. 15 N/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, 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	16	X

**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
1 a 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 checked="" type="checkbox"/> Yes <input 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 checked="" type="checkbox"/> Yes <input 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.	1 b	X
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?	1 c	X
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? If 'Yes,' list the years 20 __, 20 __, 20 __, 20 __	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer 'No' and attach statement — see instructions.)	2 b	N/A
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. 20 __, 20 __, 20 __, 20 __		
3 a 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.)	3 b	N/A
4 a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4 a	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?	4 b	X

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Form 990-PF (2020)

**Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required** (continued)**5 a** During the year, did the foundation pay or incur any amount to:

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions ☐ Yes ☒ No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

**b** If any answer is 'Yes' to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructionsOrganizations relying on a current notice regarding disaster assistance, check here ☐**c** If the answer is 'Yes' to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☒ No N/A  
If 'Yes,' attach the statement required by Regulations section 53.4945-5(d).**6 a** Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? ☐ Yes ☒ No  
If 'Yes' to 6b, file Form 8870.**7 a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No**b** If 'Yes,' did the foundation receive any proceeds or have any net income attributable to the transaction? ☐ Yes ☒ No N/A**8** Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year? ☐ Yes ☒ No**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** SEE STATEMENT 9**1** List all officers, directors, trustees, and foundation managers and their compensation. See instructions.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
CAROL GONNELLA PO BOX 1226 JACKSON, WY 83001	SECRETARY 3.00	40,000.	0.	0.
JOHN R. CLARK 3805 VALLEY COMMONS DR. STE 7 BOZEMAN, MT 59718	TREASURER 3.00	40,000.	0.	0.
CHARLES FOLLAND PO BOX 437 RIGBY, ID 83442	PRESIDENT 3.00	40,000.	0.	0.
RYAN KIRKHAM P.O. BOX 1789 WEST YELLOWSTONE, MT 59758	VICE PRESIDEN 3.00	40,000.	0.	0.

**2** Compensation of five highest-paid employees (other than those included on line 1 – see instructions). If none, enter 'NONE.'

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

**Total** number of other employees paid over \$50,000 ☐ 0

**Part 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
WELLS FARGO CLEARING SERVICES, LLC 2801 MARKET STREET SAINT LOUIS, MO 63103	INVESTMENT ADVISORY	105,220.
ROBER W. BAIRD & CO. INC. 777 EAST WISCONSIN AVENUE MILWAUKEE, WI 53202	INVESTMENT ADVISORY	115,868.
<b>Total</b> 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 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	
<b>Total.</b> Add lines 1 through 3	0.

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Form 990-PF (2020)

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

<b>1</b> Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
<b>a</b> Average monthly fair market value of securities .....	<b>1 a</b>	36,268,792.
<b>b</b> Average of monthly cash balances .....	<b>1 b</b>	1,336,958.
<b>c</b> Fair market value of all other assets (see instructions) .....	<b>1 c</b>	17,090,000.
<b>d Total</b> (add lines 1a, b, and c) .....	<b>1 d</b>	54,695,750.
<b>e</b> Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) .....	<b>1 e</b>	0.
<b>2</b> Acquisition indebtedness applicable to line 1 assets .....	<b>2</b>	0.
<b>3</b> Subtract line 2 from line 1d. ....	<b>3</b>	54,695,750.
<b>4</b> Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions) .....	<b>4</b>	820,436.
<b>5 Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4. ....	<b>5</b>	53,875,314.
<b>6 Minimum investment return.</b> Enter 5% of line 5 .....	<b>6</b>	2,693,766.

**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.)

<b>1</b> Minimum investment return from Part X, line 6 .....	<b>1</b>	2,693,766.
<b>2a</b> Tax on investment income for 2020 from Part VI, line 5 .....	<b>2 a</b>	34,219.
<b>b</b> Income tax for 2020. (This does not include the tax from Part VI.) .....	<b>2 b</b>	
<b>c</b> Add lines 2a and 2b .....	<b>2 c</b>	34,219.
<b>3</b> Distributable amount before adjustments. Subtract line 2c from line 1 .....	<b>3</b>	2,659,547.
<b>4</b> Recoveries of amounts treated as qualifying distributions .....	<b>4</b>	
<b>5</b> Add lines 3 and 4 .....	<b>5</b>	2,659,547.
<b>6</b> Deduction from distributable amount (see instructions) .....	<b>6</b>	
<b>7 Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 .....	<b>7</b>	2,659,547.

**Part XII** **Qualifying Distributions** (see instructions)

<b>1</b> Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
<b>a</b> Expenses, contributions, gifts, etc. — total from Part I, column (d), line 26 .....	<b>1 a</b>	1,880,051.
<b>b</b> Program-related investments — total from Part IX-B .....	<b>1 b</b>	
<b>2</b> Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes .....	<b>2</b>	
<b>3</b> Amounts set aside for specific charitable projects that satisfy the:		
<b>a</b> Suitability test (prior IRS approval required) .....	<b>3 a</b>	
<b>b</b> Cash distribution test (attach the required schedule) .....	<b>3 b</b>	
<b>4 Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8; and Part XIII, line 4 .....	<b>4</b>	1,880,051.
<b>5</b> 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. ....	<b>5</b>	
<b>6 Adjusted qualifying distributions.</b> Subtract line 5 from line 4 .....	<b>6</b>	1,880,051.

**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
<b>1</b> Distributable amount for 2020 from Part XI, line 7 .....				2,659,547.
<b>2</b> Undistributed income, if any, as of the end of 2020:				
<b>a</b> Enter amount for 2019 only .....			0.	
<b>b</b> Total for prior years: 20 __, 20 __, 20 __ .....		0.		
<b>3</b> Excess distributions carryover, if any, to 2020:				
<b>a</b> From 2015 .....				
<b>b</b> From 2016 .....				
<b>c</b> From 2017 .....				
<b>d</b> From 2018 .....				
<b>e</b> From 2019 .....	30,071.			
<b>f</b> Total of lines 3a through e .....	30,071.			
<b>4</b> Qualifying distributions for 2020 from Part XII, line 4: ► \$ 1,880,051.				
<b>a</b> Applied to 2019, but not more than line 2a ..			0.	
<b>b</b> Applied to undistributed income of prior years (Election required — see instructions) .....		0.		
<b>c</b> Treated as distributions out of corpus (Election required — see instructions) .....	0.			
<b>d</b> Applied to 2020 distributable amount .....				1,880,051.
<b>e</b> Remaining amount distributed out of corpus ..	0.			
<b>5</b> Excess distributions carryover applied to 2020 (If an amount appears in column (d), the same amount must be shown in column (a).)	30,071.			30,071.
<b>6</b> Enter the net total of each column as indicated below:				
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5. ....	0.			
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b .....		0.		
<b>c</b> 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.		
<b>d</b> Subtract line 6c from line 6b. Taxable amount — see instructions .....		0.		
<b>e</b> Undistributed income for 2019. Subtract line 4a from line 2a. Taxable amount — see instructions .....			0.	
<b>f</b> Undistributed income for 2020. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2021 .....				749,425.
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required — see instructions) .....	0.			
<b>8</b> Excess distributions carryover from 2015 not applied on line 5 or line 7 (see instructions) ..	0.			
<b>9</b> Excess distributions carryover to 2021. Subtract lines 7 and 8 from line 6a .....	0.			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2016 .....				
<b>b</b> Excess from 2017 .....				
<b>c</b> Excess from 2018 .....				
<b>d</b> Excess from 2019 .....				
<b>e</b> Excess from 2020 .....				

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Form 990-PF (2020)

**Part XIV Private Operating Foundations** (see instructions and Part VII-A, question 9)

N/A

**1 a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2020, enter the date of the ruling: ▶

**b** Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2020	(b) 2019	(c) 2018	(d) 2017	
<b>2 a</b> Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed: .....					
<b>b</b> 85% of line 2a: .....					
<b>c</b> Qualifying distributions from Part XII, line 4, for each year listed: .....					
<b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities: .....					
<b>e</b> Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c: .....					
<b>3</b> Complete 3a, b, or c for the alternative test relied upon:					
<b>a</b> 'Assets' alternative test — enter:					
<b>(1)</b> Value of all assets: .....					
<b>(2)</b> Value of assets qualifying under section 4942(j)(3)(B)(i): .....					
<b>b</b> 'Endowment' alternative test — enter 2/3 of minimum investment return shown in Part X, line 6, for each year listed: .....					
<b>c</b> 'Support' alternative test — enter:					
<b>(1)</b> Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties): .....					
<b>(2)</b> Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii): .....					
<b>(3)</b> Largest amount of support from an exempt organization: .....					
<b>(4)</b> Gross investment income: .....					

**Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year — see instructions.)****1 Information Regarding Foundation Managers:**

**a** List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)

NONE

**b** List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

NONE

**2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc., to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions.

**a** The name, address, and telephone number or email address of the person to whom applications should be addressed:

SEE STATEMENT 10

**b** The form in which applications should be submitted and information and materials they should include:

SEE STATEMENT FOR LINE 2A

**c** Any submission deadlines:

SEE STATEMENT FOR LINE 2A

**d** Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

SEE STATEMENT FOR LINE 2A

**Part XV** Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> Paid during the year SEE STATEMENT 11				
<b>Total</b> .....			<b>3 a</b>	1,720,500.
<b>b</b> Approved for future payment				
<b>Total</b> .....			<b>3 b</b>	

<b>Part XVI-A</b>	<b>Analysis of Income-Producing Activities</b>
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Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions.)
		(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1	Program service revenue:					
a						
b						
c						
d						
e						
f						
g	Fees and contracts from government agencies . .					
2	Membership dues and assessments . . . . .					
3	Interest on savings and temporary cash investments . . . . .			14	1,032.	
4	Dividends and interest from securities . . . . .			14	1,056,262.	
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 . . . . .			3	1,000,000.	
7	Other investment income . . . . .					
8	Gain or (loss) from sales of assets other than inventory . . . . .			14	991,847.	
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) . . . . .				3,049,141.	
13	<b>Total.</b> Add line 12, columns (b), (d), and (e) . . . . .				<b>3,049,141.</b>	

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

<b>Part XVI-B</b>	<b>Relationship of Activities to the Accomplishment of Exempt Purposes</b>
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[illegible]





**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](http://www.irs.gov/Form990) for the latest information.**

OMB No. 1545-0047

**2020**Name of the organization **CROSS CHARITABLE FOUNDATION, INC.**  
**ATTN: JOHN R. CLARK**Employer identification number  
**83-0331707****Organization type** (check one):**Filers of:****Section:**

Form 990 or 990-EZ

- ☐ 501(c)( ) (enter number) organization
- ☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
- ☐ 527 political organization

Form 990-PF

- ☒ 501(c)(3) exempt private foundation
- ☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
- ☐ 501(c)(3) taxable private foundation

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

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

**Special Rules**

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33-1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000; or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h; or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I (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. ► \$ \_\_\_\_\_

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





Name of organization

CROSS CHARITABLE FOUNDATION, INC.

Employer identification number

83-0331707

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

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

**Underpayment of Estimated Tax by Corporations**

► Attach to the corporation's tax return.

► Go to [www.irs.gov/Form2220](http://www.irs.gov/Form2220) for instructions and the latest information.**2020**Name **CROSS CHARITABLE FOUNDATION, INC.**  
**ATTN: JOHN R. CLARK**Employer identification number  
**83-0331707****Note:** Generally, the corporation is not required to file Form 2220 (see Part II below for exceptions) because the IRS will figure any penalty owed and bill the corporation. However, the corporation may still use Form 2220 to figure the penalty. If so, enter the amount from page 2, line 38, on the estimated tax penalty line of the corporation's income tax return, but **do not** attach Form 2220.**Part I Required Annual Payment**

<b>1</b> Total tax (see instructions) .....	<b>1</b>	<b>34,219.</b>
<b>2a</b> Personal holding company tax (Schedule PH (Form 1120), line 26) included on line 1 .....	<b>2a</b>	
<b>b</b> Look-back interest included on line 1 under section 460(b)(2) for completed long-term contracts or section 167(g) for depreciation under the income forecast method .....	<b>2b</b>	
<b>c</b> Credit for federal tax paid on fuels (see instructions) .....	<b>2c</b>	
<b>d Total.</b> Add lines 2a through 2c .....	<b>2d</b>	
<b>3</b> Subtract line 2d from line 1. If the result is less than \$500, <b>do not</b> complete or file this form. The corporation does not owe the penalty. ....	<b>3</b>	<b>34,219.</b>
<b>4</b> Enter the tax shown on the corporation's 2019 income tax return. See instructions. <b>Caution: If the tax is zero or the tax year was for less than 12 months, skip this line and enter the amount from line 3 on line 5.</b> .....	<b>4</b>	<b>29,607.</b>
<b>5 Required annual payment.</b> Enter the <b>smaller</b> of line 3 or line 4. If the corporation is required to skip line 4, enter the amount from line 3 .....	<b>5</b>	<b>29,607.</b>

**Part II Reasons for Filing** — Check the boxes below that apply. If any boxes are checked, the corporation **must** file Form 2220 even if it does not owe a penalty. See instructions.

- 6** ☐ The corporation is using the adjusted seasonal installment method.
- 7** ☐ The corporation is using the annualized income installment method.
- 8** ☒ The corporation is a "large corporation" figuring its first required installment based on the prior year's tax.

**Part III Figuring the Underpayment**

	(a)	(b)	(c)	(d)	
<b>9</b> Installment due dates. Enter in columns (a) through (d) the 15th day of the 4th (Form 990-PF filers: Use 5th month), 6th, 9th, and 12th months of the corporation's tax year. Filers with installments due on or after April 1, 2020, and before July 15, 2020, see instructions. ....	<b>9</b>	7/15/20	7/15/20	9/15/20	12/15/20
<b>10 Required installments.</b> If the box on line 6 and/or line 7 above is checked, enter the amounts from Schedule A, line 38. If the box on line 8 (but not 6 or 7) is checked, see instructions for the amounts to enter. If none of these boxes are checked, enter 25% (0.25) of line 5 above in each column .....	<b>10</b>	7,402.	9,708.	8,555.	8,555.
<b>11</b> Estimated tax paid or credited for each period. For column (a) only, enter the amount from line 11 on line 15. See instructions. ....	<b>11</b>	22,221.			
<b>Complete lines 12 through 18 of one column before going to the next column.</b>					
<b>12</b> Enter amount, if any, from line 18 of the preceding column .....	<b>12</b>		14,819.	5,111.	
<b>13</b> Add lines 11 and 12 .....	<b>13</b>		14,819.	5,111.	
<b>14</b> Add amounts on lines 16 and 17 of the preceding column .....	<b>14</b>				3,444.
<b>15</b> Subtract line 14 from line 13. If zero or less, enter -0- .....	<b>15</b>	22,221.	14,819.	5,111.	0.
<b>16</b> If the amount on line 15 is zero, subtract line 13 from line 14. Otherwise, enter -0- .....	<b>16</b>		0.	0.	
<b>17 Underpayment.</b> If line 15 is less than or equal to line 10, subtract line 15 from line 10. Then go to line 12 of the next column. Otherwise, go to line 18 .....	<b>17</b>			3,444.	8,555.
<b>18 Overpayment.</b> If line 10 is less than line 15, subtract line 10 from line 15. Then go to line 12 of the next column .....	<b>18</b>	14,819.	5,111.		

Go to **Part IV** on page 2 to figure the penalty. Do not go to **Part IV** if there are no entries on line 17 — no penalty is owed.

**Part IV Figuring the Penalty**

	(a)	(b)	(c)	(d)
<b>19</b> Enter the date of payment or the 15th day of the 4th month after the close of the tax year, whichever is earlier. ( <b>C corporations with tax years ending June 30 and S corporations:</b> Use 3rd month instead of 4th month. <b>Form 990-PF and Form 990-T filers:</b> Use 5th month instead of 4th month.) See instructions.	<b>19</b>		5/15/21	5/15/21
<b>20</b> Number of days from due date of installment on line 9 to the date shown on line 19.	<b>20</b>		242	151
<b>21</b> Number of days on line 20 after 4/15/2020 and before 7/1/2020.	<b>21</b>			
<b>22</b> Underpayment on line 17 $\times \frac{\text{Number of days on line 21}}{366} \times 5\% (0.05)$	<b>22</b>			
<b>23</b> Number of days on line 20 after 6/30/2020 and before 10/1/2020.	<b>23</b>		15	
<b>24</b> Underpayment on line 17 $\times \frac{\text{Number of days on line 23}}{366} \times 3\% (0.03)$	<b>24</b>		4.23	
<b>25</b> Number of days on line 20 after 9/30/2020 and before 1/1/2021.	<b>25</b>		92	16
<b>26</b> Underpayment on line 17 $\times \frac{\text{Number of days on line 25}}{366} \times 3\% (0.03)$	<b>26</b>		25.97	11.22
<b>27</b> Number of days on line 20 after 12/31/2020 and before 4/1/2021.	<b>27</b>		90	90
<b>28</b> Underpayment on line 17 $\times \frac{\text{Number of days on line 27}}{365} \times 3\% (0.03)$	<b>28</b>		25.48	63.28
<b>29</b> Number of days on line 20 after 3/31/2021 and before 7/1/2021.	<b>29</b>		45	45
<b>30</b> Underpayment on line 17 $\times \frac{\text{Number of days on line 29}}{365} \times 5\% \dots$	<b>30</b>		21.23	52.74
<b>31</b> Number of days on line 20 after 6/30/2021 and before 10/1/2021.	<b>31</b>			
<b>32</b> Underpayment on line 17 $\times \frac{\text{Number of days on line 31}}{365} \times \dots\%$	<b>32</b>			
<b>33</b> Number of days on line 20 after 9/30/2021 and before 1/1/2022.	<b>33</b>			
<b>34</b> Underpayment on line 17 $\times \frac{\text{Number of days on line 33}}{365} \times \dots\%$	<b>34</b>			
<b>35</b> Number of days on line 20 after 12/31/2021 and before 3/16/2022.	<b>35</b>			
<b>36</b> Underpayment on line 17 $\times \frac{\text{Number of days on line 35}}{365} \times \dots\%$	<b>36</b>			
<b>37</b> Add lines 22, 24, 26, 28, 30, 32, 34, and 36.	<b>37</b>		76.91	127.24
<b>38 Penalty.</b> Add columns (a) through (d) of line 37. Enter the total here and on Form 1120, line 34; or the comparable line for other income tax returns.	<b>38</b>			204.

\*Use the penalty interest rate for each calendar quarter, which the IRS will determine during the first month in the preceding quarter. These rates are published quarterly in an IRS News Release and in a revenue ruling in the Internal Revenue Bulletin. To obtain this information on the Internet, access the IRS website at [www.irs.gov](http://www.irs.gov). You can also call 1-800-829-4933 to get interest rate information.

2020

**FEDERAL STATEMENTS**  
**CROSS CHARITABLE FOUNDATION, INC.**  
**ATTN: JOHN R. CLARK**

PAGE 1

83-0331707

**STATEMENT 1**  
**FORM 990-PF, PART I, LINE 16B**  
**ACCOUNTING FEES**

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES.....	\$ 16,036.			\$ 16,036.
TOTAL	<u>\$ 16,036.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>	<u>\$ 16,036.</u>

**STATEMENT 2**  
**FORM 990-PF, PART I, LINE 16C**  
**OTHER PROFESSIONAL FEES**

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT FEES.....	\$ 221,029.	\$ 221,029.		
LEGAL FEES.....	15,790.			\$ 15,790.
TOTAL	<u>\$ 236,819.</u>	<u>\$ 221,029.</u>	<u>\$ 0.</u>	<u>\$ 15,790.</u>

**STATEMENT 3**  
**FORM 990-PF, PART I, LINE 18**  
**TAXES**

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL TAXES PAID.....	\$ 5,346.	\$ 5,346.		
FOREIGN TAXES.....	3,484.	3,484.		
PROPERTY TAXES.....	7,821.	7,821.		
TOTAL	<u>\$ 16,651.</u>	<u>\$ 16,651.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>

**STATEMENT 4**  
**FORM 990-PF, PART I, LINE 23**  
**OTHER EXPENSES**

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
DUES & SUBSCRIPTIONS.....	\$ 180.			\$ 180.
INSURANCE.....	6,912.			6,912.
LICENSES & FEES.....	250.			250.
MEETINGS.....	385.	\$ 192.		193.
PRINTING & MARKETING.....	190.			190.
TOTAL	<u>\$ 7,917.</u>	<u>\$ 192.</u>	<u>\$ 0.</u>	<u>\$ 7,725.</u>



**FEDERAL STATEMENTS**  
**CROSS CHARITABLE FOUNDATION, INC.**  
**ATTN: JOHN R. CLARK**

**STATEMENT 5**  
**FORM 990-PF, PART II, LINE 11**  
**INVESTMENTS - LAND, BUILDINGS, AND EQUIPMENT**

CATEGORY	BASIS	ACCUM. DEPREC.	BOOK VALUE	FAIR MARKET VALUE
FURNITURE AND FIXTURES	\$ 634,000.	\$ 591,562.	\$ 42,438.	\$ 42,438.
BUILDINGS	11,383,436.	1,522,697.	9,860,739.	9,860,739.
LAND	2,271,555.		2,271,555.	7,186,823.
TOTAL	<u>\$ 14,288,991.</u>	<u>\$ 2,114,259.</u>	<u>\$ 12,174,732.</u>	<u>\$ 17,090,000.</u>

**STATEMENT 6**  
**FORM 990-PF, PART II, LINE 22**  
**OTHER LIABILITIES**

ROUNDING.....	3.
TOTAL	<u>\$ 3.</u>

**STATEMENT 7**  
**FORM 990-PF, PART III, LINE 3**  
**OTHER INCREASES**

UNREALIZED GAIN ON INVESTMENTS.....	\$ 2,118,901.
TOTAL	<u>\$ 2,118,901.</u>

**STATEMENT 8**  
**FORM 990-PF, PART IV, LINE 1**  
**CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME**

ITEM	(A) DESCRIPTION	(B) HOW ACQUIRED	(C) DATE ACQUIRED	(D) DATE SOLD
1	BAIRD ACCT #3146-4427 SHORT TERM	PURCHASED	VARIOUS	12/31/2020
2	BAIRD ACCT #3146-4427 LONG TERM	PURCHASED	VARIOUS	12/31/2020
3	BAIRD ACCT #3146-4427 LT NON COVERED	PURCHASED	VARIOUS	12/31/2020
4	WF ACCT #3620 ST	PURCHASED	VARIOUS	12/31/2020
5	WF ACCT #3620 LT COVERED	PURCHASED	VARIOUS	12/31/2020
6	WF ACCT #3620 LT NON COVERED	PURCHASED	VARIOUS	12/31/2020
7	WF ACCT #5811 ST COVERED	PURCHASED	VARIOUS	12/31/2020
8	WF ACCT #5811 ST NON COVERED	PURCHASED	VARIOUS	12/31/2020
9	WF ACCT #5811 LT COVERED	PURCHASED	VARIOUS	12/31/2020
10	WF ACCT #5811 LT NON COVERED	PURCHASED	VARIOUS	12/31/2020
11	WF ACCT #1194 ST COVERED	PURCHASED	VARIOUS	12/31/2020
12	WF ACCT #1194 ST NON COVERED	PURCHASED	VARIOUS	12/31/2020
13	WF ACCT #1194 LT COVERED	PURCHASED	VARIOUS	12/31/2020
14	WF ACCT #1194 LT NON COVERED	PURCHASED	VARIOUS	12/31/2020
15	WF ACCT #1194 LT	PURCHASED	VARIOUS	12/31/2020
16	PAINTINGS	PURCHASED	VARIOUS	12/31/2020

**STATEMENT 8 (CONTINUED)**  
**FORM 990-PF, PART IV, LINE 1**  
**CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME**

ITEM	(E) GROSS SALES	(F) DEPREC. ALLOWED	(G) COST BASIS	(H) GAIN (LOSS)	(I) FMV 12/31/69	(J) ADJ. BAS. 12/31/69	(K) EXCESS (I) - (J)	(L) GAIN (LOSS)
1	375,606.		453,041.	-77,435.				\$ -77,435.
2	3887285.		3671152.	216,133.				216,133.
3	28,222.		0.	28,222.				28,222.
4	5,063.		6,709.	-1,646.				-1,646.
5	161,222.		175,290.	-14,068.				-14,068.
6	184,122.		165,825.	18,297.				18,297.
7	14,245.		12,743.	1,502.				1,502.
8	2,400.		3,974.	-1,574.				-1,574.
9	1113458.		1032244.	81,214.				81,214.
10	1476442.		1511342.	-34,900.				-34,900.
11	4515700.		4311311.	204,389.				204,389.
12	1.		0.	1.				1.
13	2654978.		2123561.	531,417.				531,417.
14	161,405.		112,180.	49,225.				49,225.
15	70.		0.	70.				70.
16	3,000.		12,000.	-9,000.				-9,000.
							TOTAL	<u>\$ 991,847.</u>

**STATEMENT 9**  
**FORM 990-PF, PART VIII**  
**COMPENSATION EXPLANATION**

**WELLS FARGO CLEARING SERVICES, LLC**  
 FINANCIAL ADVISORY FEES PAID TO INVESTMENT MANAGEMENT COMPANY.

**ROBER W. BAIRD & CO. INC.**  
 FINANCIAL ADVISORY FEES PAID TO INVESTMENT MANAGEMENT COMPANY.

**STATEMENT 10**  
**FORM 990-PF, PART XV, LINE 2A-D**  
**APPLICATION SUBMISSION INFORMATION**

NAME OF GRANT PROGRAM:	GRANTS MUST BE COMPLETED ONLINE
NAME:	CROSS CHARITABLE FOUNDATION
CARE OF:	DIRECTORS
STREET ADDRESS:	PO BOX 1789
CITY, STATE, ZIP CODE:	WEST YELLOWSTONE, MT 59758
TELEPHONE:	406-585-3393
E-MAIL ADDRESS:	CROSSCHARITABLEFOUNDATION.ORG
FORM AND CONTENT:	SUBMITTED ELECTRONICALLY ONLINE
SUBMISSION DEADLINES:	AUGUST 1ST ANNUALLY
RESTRICTIONS ON AWARDS:	GRANTS ARE FOCUSED IN MONTANA, IDAHO, UTAH, AND WYOMING.

**STATEMENT 11**  
**FORM 990-PF, PART XV, LINE 3A**  
**RECIPIENT PAID DURING THE YEAR**

<u>NAME AND ADDRESS</u>	<u>DONEE RELATIONSHIP</u>	<u>FOUND- ATION STATUS</u>	<u>PURPOSE OF GRANT</u>	<u>AMOUNT</u>
CLIMB WYOMING 1001 WEST 31ST STREET CHEYENNE WY 82001	NONE	PC	GENERAL FUND	\$ 30,000.
THE CONSERVATION FUND 1355 N. FORT MYER DRIVE, SUITE 1300 ARLINGTON VA 22209	NONE	PC	GENERAL FUND	60,000.
OGDEN NATURE CENTER 966 WEST 12TH STREET OGDEN UT 84404	NONE	PC	GENERAL FUND	5,000.
WEST RIDGE ACADEMY 5500 BAGLEY PARK ROAD WEST JORDAN UT 84081	NONE	PC	GENERAL FUND	35,000.
UTAH ANIMAL ADOPTION CENTER 1955 NORTH REDWOOD ROAD SALT LAKE CITY UT 84116	NONE	PC	GENERAL FUND	15,000.
ANIMAL ADOPTION CENTER 175 NORTH GLENWOOD STREET JACKSON WY 83001	NONE	PC	GENERAL FUND	25,000.
ABILITY FOUND 5236 S GREENPINE DRIVE SALT LAKE CITY UT 84123	NONE	PC	GENERAL FUND	10,000.
SOUTH VALLEY SANCTUARY PO BOX 1028 WEST JORDAN UT 84084	NONE	PC	GENERAL FUND	15,000.
WEST YELLOWSTONE PUBLIC LIBRARY 23 NORTH DUNRAVEN STREET WEST YELLOWSTONE MT 59758	NONE	GOV	GENERAL FUND	10,000.
HENRY'S FORK FOUNDATION 606 MAIN ST. ASHTON ID 83420	NONE	PF	GENERAL FUND	15,000.
WEST YELLOWSTONE FOUNDATION PO BOX 255 WEST YELLOWSTONE MT 59758	NONE	PF	GENERAL FUND	35,000.
THE NATURE CONSERVANCY 4245 NORTH FIARFAX DRIVE, SUITE 100 ARLINGTON VA 22203	NONE	PC	GENERAL FUND	10,000.

**STATEMENT 11 (CONTINUED)**  
**FORM 990-PF, PART XV, LINE 3A**  
**RECIPIENT PAID DURING THE YEAR**

<u>NAME AND ADDRESS</u>	<u>DONEE RELATIONSHIP</u>	<u>FOUND- ATION STATUS</u>	<u>PURPOSE OF GRANT</u>	<u>AMOUNT</u>
GREATER YELLOWSTONE COALITION 215 S. WALLACE BOZEMAN MT 59715	NONE	PC	GENERAL FUND	\$ 35,000.
BEST FRIENDS 5001 ANGEL CANYON ROAD KANAB UT 84741	NONE	PC	GENERAL FUND	30,000.
HEART OF THE VALLEY ANIMAL SHELTER 1549 E. CAMERON BRIDGE RD BOZEMAN MT 59718	NONE	PC	GENERAL FUND	20,000.
AMERICAN RIVERS 1101 14TH STREET NW, SUITE 1400 WASHINGTON DC 20005	NONE	PC	GENERAL FUND	15,000.
BLACKFOOT CHALLENGE INC. 405 MAIN STREET OVANDO MT 59854	NONE	PC	GENERAL FUND	27,000.
HUMANE SOCIETY OF UTAH PO BOX 573659 MURRAY UT 84157	NONE	PC	GENERAL FUND	15,000.
INTERMOUNTAIN THERAPY ANIMALS 4050 SOUTH 2700 EAST SALT LAKE CITY UT 84124	NONE	PC	GENERAL FUND	15,000.
MONTANA WILDERNESS ASSOCIATION 80 SOUTH WARREN ST. HELENA MT 59601	NONE	PC	GENERAL FUND	10,000.
NATIONAL PARKS CONSERVATION ASSOC. 777 6TH STREET NW SUITE 700 WASHINGTON DC 20001	NONE	PC	GENERAL FUND	25,000.
SNAKE RIVER ANIMAL SHELTER 430 PARK AVE IDAHO FALLS ID 83402	NONE	PC	GENERAL FUND	20,000.
THRIVE 400 E. BABCOCK ST. BOZEMAN MT 59715	NONE	PC	GENERAL FUND	10,000.

**STATEMENT 11 (CONTINUED)**  
**FORM 990-PF, PART XV, LINE 3A**  
**RECIPIENT PAID DURING THE YEAR**

<u>NAME AND ADDRESS</u>	<u>DONEE RELATIONSHIP</u>	<u>FOUND- ATION STATUS</u>	<u>PURPOSE OF GRANT</u>	<u>AMOUNT</u>
TROUT UNLIMITED'S MONTANA WATER PROJECT 321 EAST MAIN STREET SUITE 411 BOZEMAN MT 59715	NONE	PC	GENERAL FUND	\$ 20,000.
ALLLIANCE HOUSE 1724 S MAIN ST SALT LAKE CITY UT 84115	NONE	PC	GENERAL FUND	10,000.
STAFFORD ANIMAL SHELTER 3 BUSINESS PARK ROAD LIVINGSTON MT 59047	NONE	PC	GENERAL FUND	20,000.
YMCA OF NORTHERN UTAH 3216 E. HIGHLAND DR #200 SALT LAKE CITY UT 84106	NONE	PC	GENERAL FUND	5,000.
YELLOWSTONE TO YUKON CONSERV. INITIATIVE P.O. BOX 157 BOZEMAN MT 59771	NONE	PC	GENERAL FUND	15,000.
WESTERN ENVIRONMENTAL LAW CENTER 1216 LINCOLN ST. EUGENE OR 97401	NONE	PC	GENERAL FUND	15,000.
THE SIERRA CLUB FOUNDATION 85 SECOND STREET, SUITE 750 SAN FRANCISCO CA 94105	NONE	PF	GENERAL FUND	20,000.
NATIONAL ALLIANCE ON MENTAL ILLNESS 3803 N. FIARFAX DRIVE, SUITE 100 ARLINGTON VA 22203	NONE	PC	GENERAL FUND	15,000.
KITSAP HUMANE SOCIETY 9167 DICKEY RD NW SILVERDALE WA 98383	NONE	PC	GENERAL FUND	15,000.
FLATHEAD LAND TRUST 33 2ND ST E KALISPELL MT 59901	NONE	PC	GENERAL FUND	10,000.
CLARK FORK COALITION 140 S 4TH ST W MISSOULA MT 59801	NONE	PC	GENERAL FUND	25,000.

**STATEMENT 11 (CONTINUED)**  
**FORM 990-PF, PART XV, LINE 3A**  
**RECIPIENT PAID DURING THE YEAR**

<u>NAME AND ADDRESS</u>	<u>DONEE RELATIONSHIP</u>	<u>FOUND- ATION STATUS</u>	<u>PURPOSE OF GRANT</u>	<u>AMOUNT</u>
AMERICAN PRAIRIE RESERVE 7 E BEALL ST 3100 BOZEMAN MT 59715	NONE	PC	GENERAL FUND	\$ 50,000.
CENTENNIAL VALLEY ASSOCIATION PO BOX 240077 DELL MT 59724	NONE	PC	GENERAL FUND	15,000.
COMMUNITY LEADERSHIP & DEVELOPMENT, INC. 109 1/S S 32ND ST BILLINGS MT 59101	NONE	PC	GENERAL FUND	7,000.
EARTHWORKS 350 POLLYWOG LN BELGRADE MT 59714	NONE	PC	GENERAL FUND	15,000.
HEART OF THE ROCKIES INITIATIVE 1790 E. 2000 S DRIGGS ID 83422	NONE	PC	GENERAL FUND	20,000.
IDAHO ZOOLOGICAL SOCIETY 3101 AVENUE OF THE CHIEFS POCATELLO ID 83204	NONE	PC	GENERAL FUND	5,000.
JEFFERSON LAND TRUST 1033 LAWRENCE ST. PORT TOWNSEND WA 98368	NONE	PC	GENERAL FUND	30,000.
JUNIOR ACHIEVEMENT OF UTAH 515 SOUTH 700 EAST, SUITE 1F SALT LAKE CITY UT 84102		PC	GENERAL FUND	10,000.
MONTANA FOOD BANK NETWORK, INC. 5625 EXPRESSWAY MISSOULA MT 59808	NONE	PC	GENERAL FUND	10,000.
MOUNTAIN HOME MONTANA 2606 SOUTH AVE. W MISSOULA MT 59804	NONE	PC	GENERAL FUND	20,000.
MUSEUM OF IDAHO 200 N. EASTERN AVE IDAHO FALLS ID 83402	NONE	PC	GENERAL FUND	8,000.

**STATEMENT 11 (CONTINUED)**  
**FORM 990-PF, PART XV, LINE 3A**  
**RECIPIENT PAID DURING THE YEAR**

<u>NAME AND ADDRESS</u>	<u>DONEE RELATIONSHIP</u>	<u>FOUND- ATION STATUS</u>	<u>PURPOSE OF GRANT</u>	<u>AMOUNT</u>
NATURAL RESOURCES DEFENSE COUNCIL 317 E. MENDENHALL ST. BOZEMAN MT 59715	NONE	PC	GENERAL FUND	\$ 15,000.
NUZZLES & CO. 6699 N. LANDMARK DR. #103 PARK CITY UT 84098	NONE	PC	GENERAL FUND	15,000.
PRICKLY PEAR LAND TRUST 40 W. LAWRENCE ST. A HELENA MT 59601	NONE	PC	GENERAL FUND	25,000.
TAUTPHAUS PARK ZOOLOGICAL SOCIETY PO BOX 51794 IDAHO FALL ID 83405	NONE	PC	GENERAL FUND	20,000.
THE VITAL GROUND FOUNDATION 20 FORT MISSOULA RD. MISSOULA MT 59804	NONE	PC	GENERAL FUND	25,000.
BOISE RESCUE MISSION PO BOX 1494 BOISE ID 83701	NONE	PC	GENERAL FUND	15,000.
CENTER VALLEY ANIMAL RESCUE 11900 CENTER ROAD QUILCENE WA 98376	NONE	PC	GENERAL FUND	15,000.
EARTHJUSTICE 50 CALIFORNIA STREET, SUITE 500 SAN FRANCISCO CA 94111	NONE	PC	GENERAL FUND	35,000.
GALLATIN VALLEY LAND TRUST 212 S. WALLACE #102 BOZEMAN MT 59715	NONE	PC	GENERAL FUND	20,000.
PAWS OF JACKSON HOLE 320 EAST BROADWAY JACKSON WY 83002	NONE	PC	GENERAL FUND	20,000.
THE TRUST FOR PUBLIC LAND 101 MONTGOMERY STREET, SUITE 900 SAN FRANCISCO CA 94104	NONE	PC	GENERAL FUND	50,000.
UNIVERSITY WOMEN'S FOUNDATION PO BOX 934 PORT TOWNSEND WA 98368	NONE	PF	GENERAL FUND	12,000.

**STATEMENT 11 (CONTINUED)**  
**FORM 990-PF, PART XV, LINE 3A**  
**RECIPIENT PAID DURING THE YEAR**

<u>NAME AND ADDRESS</u>	<u>DONEE RELATIONSHIP</u>	<u>FOUND- ATION STATUS</u>	<u>PURPOSE OF GRANT</u>	<u>AMOUNT</u>
WASATCH ADAPTIVE SPORTS 9385 S. SNOWBIRD CENTER DRIVE SNOWBIRD UT 84092	NONE	PC	GENERAL FUND	\$ 5,000.
WILD EARTH GUARDIANS 516 ALTO STREET SANTA FE NM 87501	NONE	PC	GENERAL FUND	20,000.
CENTER FOR BIOLOGICAL DIVERSITY P.O. BOX 710 TUCSAN AZ 85702	NONE	PC	GENERAL FUND	25,000.
CHILDREN'S SERVICE SOCIETY OF UTAH 655 E4500 S SUITE #200 SALT LAKE CITY UT 84107	NONE	PC	GENERAL FUND	10,000.
ECOLOGY PROJECT INTERNATIONAL 315 S 4TH ST E MISSOULA MT 59801	NONE	PC	GENERAL FUND	10,000.
FAMILY PROMISE OF GALLATIN COUNTY 429 E STORY ST BOZEMAN MT 59715	NONE	PC	GENERAL FUND	35,000.
GALLATIN VALLEY YMCA 3673 LOVE LN BOZEMAN MT 59718	NONE	PC	GENERAL FUND	15,000.
GARDEN CITY HARVEST, INC. 1657 RIVER RD MISSOULA MT 59802	NONE	PC	GENERAL FUND	5,000.
GRAND TETON NATIONAL PARK FOUNDATION 115 E PEARL AVE #201 JACKSON WY 83001	NONE	PC	GENERAL FUND	15,000.
SMITHSONIAN INSTITUTION 600 MARYLAND AVE SW WASHINGTON DC 20002	NONE	PC	GENERAL FUND	20,000.
WASATCH COMMUNITY GARDENS 824 400 W #B127 SALT LAKE CITY UT 84101	NONE	PC	GENERAL FUND	10,000.



**STATEMENT 11 (CONTINUED)**  
**FORM 990-PF, PART XV, LINE 3A**  
**RECIPIENT PAID DURING THE YEAR**

<u>NAME AND ADDRESS</u>	<u>DONEE RELATIONSHIP</u>	<u>FOUND- ATION STATUS</u>	<u>PURPOSE OF GRANT</u>	<u>AMOUNT</u>
YWCA OF UTAH 322 E 300 SOUTH SALT LAKE CITY UT 84111	NONE	PC	GENERAL FUND	\$ 5,000.
LANTERN HOUSE 269 W 33RD ST OGDEN UT 84401		PC	GENERAL FUND	25,000.
SAE FOUNDATION 400 COMMONWEALTH DRIVE WARRENDALE PA 15096		PC	GENERAL FUND	20,000.
TELLER WILDLIFE REFUGE 1288 EASTSIDE HIGHWAY CORVALLIS MT 59840		PC	GENERAL FUND	5,000.
THE INN BETWEEN 1216 E 1300 S SALT LAKE CITY UT 84105		PC	GENERAL FUND	10,000.
TRACY AVIARY 589 E 1300 S SALT LAKE CITY UT 84105		PC	GENERAL FUND	5,000.
WILDERNESS WATCH PO BOX 9175 MISSOULA MT 59807		PC	GENERAL FUND	10,000.
YOUNG PARENTS EDUCATION CENTER 2400 CENTRAL AVE GREAT FALLS MT 59401		PC	GENERAL FUND	10,000.
YOUTH HOMES PO BOX 7616 MISSOULA MT 59807		PC	GENERAL FUND	7,500.
ABOVE AND BEYOND THE CLASSROOM 189 N MAIN ST, STE 112 DRIGGS ID 83422		PC	GENERAL FUND	7,500.
ASSISTANCE LEAGUE OF SOUTHERN UTAH PO BOX 910728 ST GEORGE UT 84791		PC	GENERAL FUND	5,000.
CENTER POLE 13255 SOUTH GARRYOWEN RD GARRYOWEN MT 59031		PC	GENERAL FUND	15,000.

**STATEMENT 11 (CONTINUED)**  
**FORM 990-PF, PART XV, LINE 3A**  
**RECIPIENT PAID DURING THE YEAR**

<u>NAME AND ADDRESS</u>	<u>DONEE RELATIONSHIP</u>	<u>FOUND- ATION STATUS</u>	<u>PURPOSE OF GRANT</u>	<u>AMOUNT</u>
DOVE HOUSE ADVOCACY SERVICES 1045 10TH ST PORT TOWNSEND WA 98368		PC	GENERAL FUND	\$ 5,000.
DRESS FOR SUCCESS BILLINGS 304 N 29TH ST BILLINGS MT 59101		PC	GENERAL FUND	5,000.
EAGLE MOUNT BOZEMAN 6901 GOLDSTEIN LN BOZEMAN MT 59715		PC	GENERAL FUND	10,000.
HABITAT FOR HUMANITY FLATHEAD VALLEY 2535 HIGHWAY 93 SOUTH KALISPELL MT 59901		PC	GENERAL FUND	10,000.
HAVEN 615 S 16TH AVE BOZEMAN MT 59715		PC	GENERAL FUND	15,000.
YELLOWSTONE WILDLIFE SANCTUARY PO BOX 675 RED LODGE MT 59068	NONE	PC	GENERAL FUND	9,000.
YELLOWSTONE BOYS AND GIRLS RANCH FOUNDAT PO BOX 80807 BILLINGS MT 59108	NONE	PC	GENERAL FUND	5,000.
THE FRIENDSHIP CENTER 7714 ENGLISH OAK CIRCLE ELKRIDGE MD 21075	NONE	PC	GENERAL FUND	5,000.
SOCIETY OF ST VINCENT DE PAUL BILLINGS 3005 1ST AVE S BILLINGS MT 59101	NONE	PC	GENERAL FUND	10,000.
RITECARE OF UTAH - OGDEN CHILDREN'S LEAR 650 EAST SOUTH TEMPLE SALT LAKE CITY UT 84102	NONE	PC	GENERAL FUND	5,000.
OPERATION WARM PO BOX 822431 PHILADELPHIA PA 19182	NONE	PC	GENERAL FUND	5,000.

**STATEMENT 11 (CONTINUED)**  
**FORM 990-PF, PART XV, LINE 3A**  
**RECIPIENT PAID DURING THE YEAR**

<u>NAME AND ADDRESS</u>	<u>DONEE RELATIONSHIP</u>	<u>FOUND- ATION STATUS</u>	<u>PURPOSE OF GRANT</u>	<u>AMOUNT</u>
OLYMPIC PENINSULA YMCA 675 N 5TH AVE, STE 3A SEQUIM WA 98382	NONE	PC	GENERAL FUND	\$ 15,000.
OGDEN WEBER APPLIED TECHNOLOGY COLLEGE 200 N WASHINGTON BLVD OGDEN UT 84404	NONE	PC	GENERAL FUND	30,000.
MOUNTAINLAND TECHNICAL COLLEGE 2301 WEST ASHTON BLVD LEHI UT 84043	NONE	PC	GENERAL FUND	15,000.
MONTANA COUNCIL OF TROUT UNLIMITED 312 N HIGGINS, STE 200 MISSOULA MT 59802	NONE	PC	GENERAL FUND	10,000.
MONTANA AUDUBON PO BOX 595 HELENA MT 59624	NONE	PC	GENERAL FUND	10,000.
MISSION VALLEY ANIMAL SHELTER 36251 N RESERVIOR RD POLSON MT 59860	NONE	PC	GENERAL FUND	10,000.
JESSE TREE 1121 W MILLER ST BOISE ID 83702	NONE	PC	GENERAL FUND	5,000.
HIPEEXNU KII U NUUN WISIIX PO BOX 415 LAPWAI ID 83540	NONE	PC	GENERAL FUND	5,000.
GALLATIN INVASIVE SPECIES ALLIANCE 901 N BLACK BOZEMAN MT 59715	NONE	PC	GENERAL FUND	5,000.
FUTUREINDESIGN 720 W PRICE RIVER DR PRICE UT 84501	NONE	PC	GENERAL FUND	5,000.
FRIENDS FOREVER MENTORING 210 MAIN STREET SW RONAN MT 59864	NONE	PC	GENERAL FUND	5,000.

**STATEMENT 11 (CONTINUED)**  
**FORM 990-PF, PART XV, LINE 3A**  
**RECIPIENT PAID DURING THE YEAR**

<u>NAME AND ADDRESS</u>	<u>DONEE RELATIONSHIP</u>	<u>FOUND- ATION STATUS</u>	<u>PURPOSE OF GRANT</u>	<u>AMOUNT</u>
FIGHT AGAINST DOMESTIC VIOLENCE 3135 S RICHMOND ST SALT LAKE CITY UT 84106	NONE	PC	GENERAL FUND	\$ 5,000.
DUCKS UNLIMITED, INC 1 WATERFOWL WAY MEMPHIS TN 38120	NONE	PC	GENERAL FUND	20,000.
COLOR COUNTRY ANIMAL WELFARE PO BOX 750404 TORREY UT 84775	NONE	PC	GENERAL FUND	5,000.
CHILD BRIDGE PO BOX 310 BIGFORK MT 59911	NONE	PC	GENERAL FUND	15,000.
BUFFALO FIELD CAMPAIGN PO BOX 957 WEST YELLOWSTONE MT 59758	NONE	PC	GENERAL FUND	5,000.
BOYS & GIRLS CLUBS OF WEBER-DAVIS 2510 WASHINGTON BLVD, STE 200 OGDEN UT 84401	NONE	PC	GENERAL FUND	5,000.
BOYS & GIRLS CLUB OF MISSOULA COUNTY 1515 FIARVIEW AVE, STE 243 MISSOULA MT 59801	NONE	PC	GENERAL FUND	5,000.
BIG BROTHERS BIG SISTERS OF BIG SKY 15 SOUTH 8TH AVENUE BOZEMAN MT 59715	NONE	PC	GENERAL FUND	12,500.
ALLIANCE FOR YOUTH PO BOX 2982 GREAT FALLS MT 59403	NONE	PC	GENERAL FUND	15,000.
PEOPLE AND CARNIVORES, INC PO BOX 6733 BOZEMAN MT 59771	NONE	PC	GENERAL FUND	15,000.
SEALIFE RESPONSE, REHAB AND RESEARCH 2003 S 216TH ST, #98811 DES MOINES WA 98198	NONE	PC	GENERAL FUND	10,000.

TOTAL \$ 1,720,500.