Form **4720**

Department of the Treasury
Internal Revenue Service

Return of Certain Excise Taxes on Charities and Other Persons Under Chapters 41 and 42 of the Internal Revenue Code

(Sections 4911, 4912, 4941, 4942, 4943, 4944, 4945, and 4955)

▶ See separate instructions.

OMB No. 1545-0052

1990

For the calendar year 1990 or other tax year beginning _____, 1990, and ending _____, 19 ____.

Name of foundation or public charity	**Employer identification number**
Number, street, and room or suite no. (or P.O. box if mail is not delivered to street address)	Check box for type of annual return: ☐ Form 990 ☐ Form 990EZ ☐ Form 990-PF ☐ Form 5227
City or town, state, and ZIP code	

	Yes	No
A Is the organization a foreign private foundation within the meaning of section 4948(b)?		
B Has corrective action been taken on any transaction that resulted in Chapter 42 taxes being reported on this form? If "Yes," attach a detailed documentation and description of the corrective action taken and, if applicable, enter the fair market value of any property recovered as a result of the correction ▶ $ _____. For any uncorrected acts, attach explanation (see instructions).		

SCHEDULE A.—Initial Taxes on Self-dealing (Section 4941)

Part I Acts of Self-dealing and Tax Computation

(a) Act number	(b) Date of act	(c) Description of act
1		
2		
3		
4		
5		

(d) Question number from Form 990-PF, Part VII, or Form 5227, Part VI, applicable to the act	(e) Amount involved in act	(f) Initial tax on self-dealing (5% of col. (e))	(g) Tax on foundation managers (if applicable) (lesser of $10,000 or 2½% of col. (e))

Part II Summary of Tax Liability of Self-dealers and Proration of Payments

(a) Names of self-dealers liable for tax	(b) Act no. from Part I, col. (a)	(c) Tax from Part I, col. (f), or prorated amount	(d) Self-dealer's total tax liability (add amounts in col. (c)) (see instructions)

Part III Summary of Tax Liability of Foundation Managers and Proration of Payments

(a) Names of foundation managers liable for tax	(b) Act no. from Part I, col. (a)	(c) Tax from Part I, col. (g), or prorated amount	(d) Manager's total tax liability (add amounts in col. (c)) (see instructions)

SCHEDULE B.—Initial Tax on Undistributed Income (Section 4942)

1 Undistributed income for years before 1989 (from Form 990-PF for 1990, Part XIV, line 6d):		
a Enter year _____	1a	
b Enter year _____	1b	
c Enter year _____	1c	
2 Undistributed income for 1989 (from Form 990-PF for 1990, Part XIV, line 6e)	2	
3 Total undistributed income at end of current tax year beginning in 1990 and subject to tax under section 4942 (add lines 1a, b, c, and 2)	3	
4 Tax—Enter 15% of line 3 here and on page 1, Part I, line 1	4	

SCHEDULE C.—Initial Tax on Excess Business Holdings (Section 4943)

Business Holdings and Computation of Tax

If you have taxable excess holdings in more than one business enterprise, attach a separate schedule for each enterprise. Refer to the instructions for each line item before making any entries.

Name and address of business enterprise

Employer identification number . . . . . ▶

Form of enterprise (corporation, partnership, trust, joint venture, sole proprietorship, etc.) ▶

		(a) Voting stock (profits interest, or beneficial interest)	(b) Value	(c) Nonvoting stock (capital interest)
1 Foundation holdings in business enterprise	1	%	%	
2 Permitted holdings in business enterprise	2	%	%	
3 Value of excess holdings in business enterprise . . .	3			
4 Value of excess holdings disposed of within 90 days; or, other value of excess holdings not subject to section 4943 tax (attach explanation)	4			
5 Taxable excess holdings in business enterprise—line 3 minus line 4	5			
6 Tax—Enter 5% of line 5	6			
7 Total tax—Add amounts on line 6, columns (a), (b), and (c); enter total here and on page 1, Part I, line 2 .	7			

SCHEDULE D.—Initial Taxes on Investments That Jeopardize Charitable Purpose (Section 4944)

Part I Investments and Tax Computation

(a) Investment number	(b) Date of investment	(c) Description of investment	(d) Amount of investment	(e) Initial tax on foundation (5% of col. (d))	(f) Initial tax on foundation managers (if applicable)—(lesser of $5,000 or 5% of col. (d))
1					
2					
3					
4					
5					
Total—column (e). Enter here and on page 1, Part I, line 3					
Total—column (f). Enter total (or prorated amount) here and in Part II, column (c), below					

Part II Summary of Tax Liability of Foundation Managers and Proration of Payments

(a) Names of foundation managers liable for tax	(b) Investment no. from Part I, col. (a)	(c) Tax from Part I, col. (f), or prorated amount	(d) Manager's total tax liability (add amounts in col. (c)) (see instructions)

SCHEDULE E.—Initial Taxes on Taxable Expenditures (Section 4945)

Part I Expenditures and Computation of Tax

(a) Item number	(b) Amount	(c) Date paid or incurred	(d) Name and address of recipient	(e) Description of expenditure and purposes for which made
1				
2				
3				
4				
5				

(f) Question number from Form 990-PF, Part VII, or Form 5227, Part VI, applicable to the expenditure	(g) Initial tax imposed on foundation (10% of col. (b))	(h) Initial tax imposed on foundation managers (if applicable)— (lesser of $5,000 or 2½% of col. (b))
Total—column (g). Enter here and on page 1, Part I, line 4		
Total—column (h). Enter total (or prorated amount) here and in Part II, column (c), below.		

Part II Summary of Tax Liability of Foundation Managers and Proration of Payments

(a) Names of foundation managers liable for tax	(b) Item no. from Part I, col. (a)	(c) Tax from Part I, col. (h), or prorated amount	(d) Manager's total tax liability (add amounts in col. (c)) (see instructions)

SCHEDULE F.—Initial Taxes on Political Expenditures (Section 4955)

Part I Expenditures and Computation of Tax

(a) Item number	(b) Amount	(c) Date paid or incurred	(d) Description of political expenditure	(e) Initial tax imposed on organization or foundation (10% of col. (b))	(f) Initial tax imposed on managers (if applicable) (lesser of $5,000 or 2½% of col. (b))
1					
2					
3					
4					
5					
Total—column (e). Enter here and on page 1, Part I, line 5					
Total—column (f). Enter total (or prorated amount) here and in Part II, column (c), below					

Part II Summary of Tax Liability of Organization Managers or Foundation Managers and Proration of Payments

(a) Names of organization managers or foundation managers liable for tax	(b) Item no. from Part I, col. (a)	(c) Tax from Part I, col. (f), or prorated amount	(d) Manager's total tax liability (add amounts in col. (c)) (see instructions)

SCHEDULE G.—Tax on Excess Lobbying Expenditures (Section 4911)

1	Excess of grass roots expenditures over grass roots nontaxable amount (from Schedule A (Form 990), Part VI, column (b), line 43). (See instructions before making entry.)	1	
2	Excess of lobbying expenditures over lobbying nontaxable amount (from Schedule A (Form 990), Part VI, column (b), line 44). (See instructions before making entry.)	2	
3	Taxable lobbying expenditures—enter the larger of line 1 or line 2	3	
4	Tax—Enter 25% of line 3 here and on page 1, Part I, line 6	4	

SCHEDULE H.—Taxes on Disqualifying Lobbying Expenditures (Section 4912)

Part I Expenditures and Computation of Tax

(a) Item number	(b) Amount	(c) Date paid or incurred	(d) Description of lobbying expenditures	(e) Tax imposed on organization (5% of col. (b))	(f) Tax imposed on organization managers (if applicable)—(5% of col. (b))
1					
2					
3					
4					
5					
Total—column (e). Enter here and on page 1, Part I, line 7					
Total—column (f). Enter total (or prorated amount) here and in Part II, column (c), below					

Part II Summary of Tax Liability of Organization Managers and Proration of Payments

(a) Names of organization managers liable for tax	(b) Item no. from Part I, col. (a)	(c) Tax from Part I, col. (f), or prorated amount	(d) Manager's total tax liability (add amounts in col. (c)) (see instructions)

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Signature of officer or trustee | Title | Date

Signature (and organization name if applicable) of self-dealer, foundation manager, or organization manager | Date

Signature (and organization name if applicable) of self-dealer, foundation manager, or organization manager | Date

Signature (and organization name if applicable) of self-dealer, foundation manager, or organization manager | Date

Signature of individual or firm preparing the return | Address of preparer | Date

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