

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

Department of the Treasury
Internal Revenue Service

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▶ **Go to 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

Name of foundation <u>John Edward Fowler Memorial Foundation</u>		A Employer identification number 51-6019469
Number and street (or P.O. box number if mail is not delivered to street address) <u>4340 East-West Highway</u>	Room/suite <u>206</u>	B Telephone number (see instructions) 3016542700
City or town, state or province, country, and ZIP or foreign postal code <u>Bethesda MD 20814</u>		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>66,845,690.</u>	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d), must be on cash basis.)	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 <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	65.	65.		
	4 Dividends and interest from securities	1,313,143.	1,313,143.		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	951,075.			
	b Gross sales price for all assets on line 6a <u>951,075.</u>		L-6a Stmt		
	7 Capital gain net income (from Part IV, line 2)		951,075.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less: Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule) See Stmt	-42,109.	-42,500.			
12 Total. Add lines 1 through 11	2,222,174.	2,221,783.			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	234,840.	117,420.		117,420.
	14 Other employee salaries and wages	113,099.	11,310.		101,789.
	15 Pension plans, employee benefits	40,000.	20,000.		20,000.
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	3,639.	1,820.		1,819.
	c Other professional fees (attach schedule) L-16c Stmt	27,937.	27,937.		0.
	17 Interest				
	18 Taxes (attach schedule) (see instructions) See Stmt	18,333.	5,522.		12,811.
	19 Depreciation (attach schedule) and depletion L-19 Stmt	793.	397.	396.	
	20 Occupancy	55,200.	27,600.		27,600.
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule) See Stmt	20,764.	10,382.		10,382.
	24 Total operating and administrative expenses. Add lines 13 through 23	514,605.	222,388.	396.	291,821.
	25 Contributions, gifts, grants paid	3,230,000.			3,230,000.
26 Total expenses and disbursements. Add lines 24 and 25	3,744,605.	222,388.	396.	3,521,821.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	-1,522,431.				
b Net investment income (if negative, enter -0-)		1,999,395.			
c Adjusted net income (if negative, enter -0-)			0.		

Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing	100.	100.	100.
	2 Savings and temporary cash investments	679,935.	146,991.	146,991.
	3 Accounts receivable ▶ Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶ Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	28,359.	28,359.	28,359.
	10a Investments—U.S. and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule) L-10b Stmt	62,662,558.	50,049,335.	50,049,335.
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment: basis ▶ 4,500. Less: accumulated depreciation (attach schedule) ▶ 0.	4,500.	4,500.	4,500.
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule) L-13 Stmt	4,795,611.	16,615,217.	16,615,217.
	14 Land, buildings, and equipment: basis ▶ 13,649. Less: accumulated depreciation (attach schedule) ▶ 12,461.	1,557.	1,188.	1,188.
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	68,172,620.	66,845,690.	66,845,690.	
Liabilities	17 Accounts payable and accrued expenses	461.	725.	
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	461.	725.	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ <input type="checkbox"/> and complete lines 24, 25, 29, and 30.			
	24 Net assets without donor restrictions			
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here ▶ <input checked="" type="checkbox"/> and complete lines 26 through 30.			
	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	68,172,159.	66,844,965.	
29 Total net assets or fund balances (see instructions)	68,172,159.	66,844,965.		
30 Total liabilities and net assets/fund balances (see instructions)	68,172,620.	66,845,690.		

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	68,172,159.
2 Enter amount from Part I, line 27a		2	-1,522,431.
3 Other increases not included in line 2 (itemize) ▶ UGL		3	195,237.
4 Add lines 1, 2, and 3		4	66,844,965.
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	66,844,965.

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.)
1a	Various stock and bonds	P	01/01/2019	12/31/2020
b	Mutual fund def comp	P	01/01/2019	12/31/2020
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 858,269.		0.	858,269.	
b 92,806.		0.	92,806.	
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			858,269.	
b			92,806.	
c				
d				
e				
2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }		2	951,075.
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	27,792.
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	27,792.
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	27,792.
6	Credits/Payments:		
a	2020 estimated tax payments and 2019 overpayment credited to 2020	6a	38,599.
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	38,599.
8	Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	95.
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	10,712.
11	Enter the amount of line 10 to be: Credited to 2021 estimated tax 10,712. Refunded	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a		X
1a		X
1b		X
1c		X
2		X
3		X
4a		X
4b		X
5		X
6	X	
7	X	
8a		
8b	X	
9		X
10		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		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		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ N/A	X	
14	The books are in care of ▶ <u>The Foundation</u> Telephone no. ▶ <u>(301) 654-2700</u> Located at ▶ <u>4340 East West Highway Bethesda MD</u> ZIP+4 ▶ <u>20814</u>		
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 ▶ 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?		X
See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ▶			

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 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 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		X
	Organizations relying on a current notice regarding disaster assistance, check here ▶ <input type="checkbox"/>		
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?		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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ 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.)		
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____		
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.)		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		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?		X

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required *(continued)*

5a	During the year, did the foundation pay or incur any amount to:		Yes	No
(1)	Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(2)	Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
(4)	Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions		5b	
	Organizations relying on a current notice regarding disaster assistance, check here	<input type="checkbox"/>		
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?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
	If "Yes," attach the statement required by Regulations section 53.4945-5(d).			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		6b	X
	If "Yes" to 6b, file Form 8870.			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
b	If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?		7b	
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?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	

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

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
Michael P Bentzen 4340 East West Highway Bethesda MD 20814	Chair 15.00	54,200.		
Jeffery P Capron 4340 East West Highway Bethesda MD 20814	President 20.00	54,200.		
Richard H Lee 4340 East West Highway Bethesda MD 20814	Retired 5.00	114,400.	40,000.	
See Statement	10.00	12,000.		

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
None		
.....		
.....		
.....		
.....		
.....		
.....		
.....		
Total number of others receiving over \$50,000 for professional services ▶		0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 n/a	
2	0.
3	
4	

Part IX-B Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

	Amount
1	
2	
3 All other program-related investments. See instructions.	
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	62,375,478.
b	Average of monthly cash balances	1b	505,472.
c	Fair market value of all other assets (see instructions)	1c	22,655.
d	Total (add lines 1a, b, and c)	1d	62,903,605.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	62,903,605.
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	943,554.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	61,960,051.
6	Minimum investment return. Enter 5% of line 5	6	3,098,003.

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	3,098,003.
2a	Tax on investment income for 2020 from Part VI, line 5	2a	27,792.
b	Income tax for 2020. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	27,792.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	3,070,211.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	3,070,211.
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	3,070,211.

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	3,521,821.
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	3,521,821.
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	3,521,821.

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				3,070,211.
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		295,353.		
d From 2018				
e From 2019		194,457.		
f Total of lines 3a through e	489,810.			
4 Qualifying distributions for 2020 from Part XII, line 4: ▶ \$ <u>3,521,821.</u>				
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				3,070,211.
e Remaining amount distributed out of corpus	451,610.			
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	941,420.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b. Taxable amount—see instructions		0.		
e Undistributed income for 2019. Subtract line 4a from line 2a. Taxable amount—see instructions			0.	
f Undistributed income for 2020. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2021				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required—see instructions)				
8 Excess distributions carryover from 2015 not applied on line 5 or line 7 (see instructions)	0.			
9 Excess distributions carryover to 2021. Subtract lines 7 and 8 from line 6a	941,420.			
10 Analysis of line 9:				
a Excess from 2016		0.		
b Excess from 2017		295,353.		
c Excess from 2018		0.		
d Excess from 2019		194,457.		
e Excess from 2020		451,610.		

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

N/A

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

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).)

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.

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 Supplementary Information Statement

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

c Any submission deadlines:

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

Part XV **Supplementary Information** *(continued)*

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
Higher Achievement 1750 Columbia Road Washington DC 20009		PC	General Operating	50,000.
Society of St. Andrew 3383 Sweet Hollow Road Big Island VA 24526		PC	General Operating	15,000.
La Cocina VA 1500 N Glebe Road Arlington VA 22207		PC	General Operating	100,000.
Housing Unlimited 12125 Viers Mill Road, #201 Silver Spring MD 20906		PC	General Operating General Operating	40,000.
Together We Bake 3821 Griffith Place Alexandria VA 22304		PC		15,000.
Food and Friends 219 Riggs Road NE Washington DC 20011		PC	General Operating	75,000.
Christ House 1717 Columbia Road NW Washington DC 20009		PC	General Operating	40,000.
Arts for the Aging 15800 Crabbs Branch Way, Ste 300 Rockville MD 20855		PC	General Operating	15,000.
Arlington Pediatric Center 3401 Columbia Pike, Ste 200 Arlington VA 22204		PC	General Operating	40,000.
See Statement				2,840,000.
Total				3a 3,230,000.
b Approved for future payment				
Total				3b

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

Table with 5 columns: (a) Business code, (b) Amount, (c) Exclusion code, (d) Amount, (e) Related or exempt function income. Rows include Program service revenue, membership dues, interest on savings, dividends, rental income, and other revenue. Total for (d) and (e) is 951,075.

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

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Line No. ▼

Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions.)

Empty grid area for explaining the relationship of activities to exempt purposes.

Part XVII Information Regarding Transfers to and Transactions and Relationships With Noncharitable Exempt Organizations

- 1** Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?
- | | Yes | No |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| a Transfers from the reporting foundation to a noncharitable exempt organization of: | | |
| (1) Cash | | X |
| (2) Other assets | | X |
| b Other transactions: | | |
| (1) Sales of assets to a noncharitable exempt organization | | X |
| (2) Purchases of assets from a noncharitable exempt organization | | X |
| (3) Rental of facilities, equipment, or other assets | | X |
| (4) Reimbursement arrangements | | X |
| (5) Loans or loan guarantees | | X |
| (6) Performance of services or membership or fundraising solicitations | | X |
| c Sharing of facilities, equipment, mailing lists, other assets, or paid employees | | X |
| d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. | | |

(a) Line no.	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527? Yes No

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship

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

Signature of officer or trustee: _____ Date: 07/26/2021 Title: President

May the IRS discuss this return with the preparer shown below? See instructions. Yes No

Paid Preparer Use Only

Print/Type preparer's name: Jeffery P Capron Preparer's signature: Jeffery P Capron Date: 07/26/2021 Check if self-employed PTIN: P00082778

Firm's name: Jeffery P Capron CPA Firm's EIN: _____

Firm's address: 10304 Montgomery Ave Phone no.: (301) 509-9735

Form 990-PF: Return of Private Foundation**Part XV, Line 2: Supplementary Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc.****Continuation Statement**

Name and Address Information	Form Information	Submission Information	Restrictions
Jeff Capron c/o The John Edward Fowler Foundation 4340 East West Highway Bethesda, MD 20814	Information as required in the online website	None	None

Form 990-PF: Return of Private Foundation**Part XV, Line 3a: Grants and Contributions Paid During the Year****Continuation Statement**

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
<i>a. Paid during the year</i>				
Common Good City Farm 319 Oakdale Place NW Washington, DC 20001		PC	General Operating	25,000.
Father McKenna Center 19 Eye Street, NW Washington, DC 20001		PC	General Operating	30,000.
Koinonia Foundation 6037 Franconia Road Alexandria, VA 22310		PC	General Operating	30,000.
Mobile Medical Care 9309 Old Georgetown Road Bethesda, MD 20814		PC	General Operating	30,000.
Project Mend-A-House 8787 Commerce Court Manassas, VA 20110		PC	General Operating	15,000.
Theatre Lab School for Dramatic Arts 733 8th Street NW Washington, DC 20001		PC	General Operating	5,000.
Hope Connections for Cancer Support 10100 Laureate Way Bethesda, MD 20814		PC	General Operating	15,000.
Britepaths 3959 Pender Drive, Ste 200 Fairfax, VA 22030		PC	General Operating	20,000.
Future Link 15 West Gude Drive Rockville, MD 20850		PC	General Operating	20,000.
Hope and a Home 1236 Columbia Road, NW Washington, DC 20009		PC	General Operating	30,000.
Jubilee Housing 1640 Columbia Road, NW Washington, DC 20009		PC	General Operating	20,000.
Judah Project 941 R Street NW Washington, DC 20001		PC	General Operating	20,000.
Shaw Community Ministry 1701 11th Street NW Washington, DC 20001		PC	General Operating	20,000.
Reach Education Inc 300 M Street SE Washington, DC 20003		PC	General Operating	25,000.
Building Bridges Across the River 1901 Mississippi Ave SE Washington, DC 20020		PC	General Operating	100,000.

Form 990-PF: Return of Private Foundation**Part XV, Line 3a: Grants and Contributions Paid During the Year****Continuation Statement**

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
<i>a. Paid during the year</i>				
Montgomery College Foundation 9221 Corporate Blvd, 3rd Fl Rockville, MD 20850		PC	General Operating	25,000.
The Washington School for Girls 1901 Mississippi Ave SE Washington, DC 20020		PC	General Operating	60,000.
Rebuilding Together Alexandria 700 Princess Street, Ste 206 Alexandria, VA 22314		PC	General Operating	20,000.
Parkmont School 4842 16th Street NW Washington, DC 20011		PC	General Operating	20,000.
My Sister's Place 1436 U Street NW Washington, DC 20009		PC	General Operating	25,000.
DC Central Kitchen 425 2nd Street NW Washington, DC 20001		PC	General Operating	100,000.
Nourish Now 1111 Taft Street Rockville, MD 20849		PC	General Operating	15,000.
One World Education 1800 Kenyon Street Washington, DC 20008		PC	General Operating	30,000.
The Fenwick Foundation 23 N Fenwick Street Arlington, VA 22201		PC	General Operating	15,000.
Resources to Inspire Students and Educators 2001 14th Street NW Washington, DC 20003		PC	General Operating	40,000.
Insight Memory Care Center 3953 Pender Drive, Ste 100 Fairfax, VA 22030		PC	General Operating	130,000.
We Are Family Senior Outreach 1525 Newton Street NW Washington, DC 20010		PC	General Operating	15,000.
Aspire After School Learning 909 S Dinwiddie Street Arlington, VA 22204		PC	General Operating	25,000.
Nick's Place 10482 Baltimore Ave, Ste 199 Beltsville, MD 20705		PC	General Operating	20,000.
New Endeavors by Women 611 N Street NW Washington, DC 20001		PC	General Operating	20,000.

Form 990-PF: Return of Private Foundation**Part XV, Line 3a: Grants and Contributions Paid During the Year****Continuation Statement**

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
<i>a. Paid during the year</i>				
Some Others Might Eat 71 O Street NW Washington, DC 20001		PC	General Operating	60,000.
Boys & Girls Club of Greater Washington 4103 Benning Road NE Washington, DC 20019		PC	General Operating	100,000.
Capital Area Food Bank 4900 Puerto Rico Avenue NE Washington, DC 20017		PC	General Operating	150,000.
Downtown Cluster of Congregations 1313 New York Avenue NW Washington, DC 20005		PC	General Operating	25,000.
Beacon House 601 Edgewood Street NE Washington, DC 20020		PC	General Operating	40,000.
Boys&Girls Club of GW 4103 Benning Road Washington, DC 20019		PC	General Operating	15,000.
Byte Back 899 N Capitol Street NE, Ste 850 Washington, DC 20002		PC	General Operating	30,000.
Dance Place 3225 8th Street NE Washington, DC 20017		PC	General Operating	20,000.
DC Law Students in Court 901 4th Street NW Washington, DC 20001		PC	General Operating	25,000.
DC Youth Orchestra Program 1120 20th Street NW, Ste 200N Washington, DC 20036		PC	General Operating	15,000.
Dumbarton Concerts 3133 Dumbarton Street NW Washington, DC 20007		PC	General Operating	55,000.
For Love of Children 1301 Pennsylvania Avenue SE Washington, DC 20003		PC	General Operating	40,000.
Friends Club 6601 Bradley Blvd Bethesda, MD 20817		PC	General Operating	20,000.
Gaithersburg HELP 301 Muddy Branch Road Gaithersburg, MD 20878		PC	General Operating	15,000.
Habitat for Humanity Washington DC 2115 Ward Court NW Ste 100 Washington, DC 20037		PC	General Operating	40,000.

Form 990-PF: Return of Private Foundation**Part XV, Line 3a: Grants and Contributions Paid During the Year****Continuation Statement**

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
<i>a. Paid during the year</i>				
Joseph's House 1730 Lanier Place NW Washington, DC 20009		PC	General Operating	40,000.
Jubilee Jobs Inc. 2712 Ontario Road NW Washington, DC 20009		PC	General Operating	30,000.
Leveling the Playing Field 9170 Brookville Road Silver Spring, MD 20910		PC	General Operating	15,000.
Literacy Council of Montgomery County 21 Maryland Avenue, Ste 320 Rockville, MD 20850		PC	General Operating	30,000.
Montgomery County Coalition for the Homeless 600-B East Gude Drive Rockville, MD 20850		PC	General Operating	75,000.
N Street Village 1333 N Street NW Washington, DC 20005		PC	General Operating	50,000.
Olney Help Inc. 16911 Georgia Avenue Olney, MD 20832		PC	General Operating	20,000.
One Common Unity 2437 15th Street NW Washington, DC 20009		PC	General Operating	20,000.
St. Ann's Center 4901 Eastern Avenue Hyattsville, MD 20782		PC	General Operating	40,000.
StoryBook Treasures 42437 Holly Knoll Court Ashburn, VA 20148		PC	General Operating	20,000.
Barker Adoption Foundation 7979 Old Georgetown Road, 1st Fl Bethesda, MD 20814		PC	General Operating	35,000.
Dance Institute 3400 14th Street NW Washington, DC 20010		PC	General Operating	15,000.
Shepard's Table 8106 Georgia Avenue Silver Spring, MD 20910		PC	General Operating	35,000.
Thrive DC 1525 Newton Street Washington, DC 20010		PC	General Operating	50,000.
Washington Ballet 3515 Wisconsin Avenue NW Washington, DC 20016		PC	General Operating	100,000.

Form 990-PF: Return of Private Foundation**Part XV, Line 3a: Grants and Contributions Paid During the Year****Continuation Statement**

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
<i>a. Paid during the year</i>				
Doorways for Women and Families 4600 N Fairfax Drive Arlington, VA 22210		PC	General Operating	35,000.
Growing Together 9023 Flower Avenue Silver Spring, MD 20901		PC	General Operating	20,000.
Crossroads Community Food Network 6930 Carroll Avenue, Ste 426 Takoma Park, MD 20912		PC	General Operating	15,000.
DC Volunteer Lawyers Project 5335 Wisconsin Avenue, Ste 440 Washington, DC 20015		PC	General Operating	25,000.
Senior Services of Alexandria 206 N Washington Street, Ste 301 Alexandria, VA 22314		PC	General Operating	15,000.
Young Playwrights' Theatre 6925 Willow Street NW Washington, DC 20012		PC	General Operating	25,000.
Central Union Mission 65 Massachusetts Avenue, NW Washington, DC 20001		PC	General Operating	70,000.
Greater Washington Diaper Bank 1532 A Street NE Washington, DC 20002		PC	General Operating	20,000.
So What Else Inc. 1 Preserve Parkway Rockville, MD 20852		PC	General Operating	75,000.
Friendship Place 4713 Wisconsin Avenue NW Washington, DC 20016		PC	General Operating	55,000.
Free Minds Book Club 1816 12th Street NW Washington, DC 20009		PC	General Operating	10,000.
Western Fairfax Christian Ministries 4511 Daly Drive Ste J Chantilly, VA 20153		PC	General Operating	35,000.
Wesley Housing of N VA 5515 Cherokee Avenue, Ste 200 Alexandria, VA 22312		PC	General Operating	60,000.
Arlington Free Clinic 2921 11th Street South Arlington, VA 22204		PC	General Operating	75,000.
David Lynch Foundation 228 E 45th Street, 15th Fl New York, NY 10017		PC	General Operating	25,000.

Form 990-PF: Return of Private Foundation**Part XV, Line 3a: Grants and Contributions Paid During the Year****Continuation Statement**

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
<i>a. Paid during the year</i>				
Homeless Children Playtime Project 1525 Newton Street NW Washington, DC 20010		PC	General Operating	15,000.
Art Enables Inc 2204 Rhode Island Avenue NE Washington, DC 20018		PC	General Operating	15,000.
College Bound Inc. 128 M Street NW Washington, DC 20001		PC	General Operating	20,000.
Calvary Women's Services 1217 Good Hope Road SE Washington, DC 20020		PC	General Operating	40,000.
				2,840,000.

Form 990-PF: Return of Private Foundation**Part VIII: Information about Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** **Continuation Statement**

Name and address	Title, and average hours per week devoted to position	Compensation	Contributions to employee benefit plans and deferred compensation	Expense account, other allowances
Brian Bentzen 4340 East West Highway Bethesda, MD 20814	Trustee	12,000.		
	5.00			
Kelly Capron 4340 East West Highway Bethesda, MD 20814	Trustee	0.		
	5.00			
		12,000.	0.	0.

Additional information from your Form 990-PF: Return of Private Foundation

Form 990-PF: Return of Private Foundation

Other Income

Continuation Statement

Description	Revenue and Expense per Book	Net Investment Income	Adjusted Net Income
Partnership income	-42,500.	-42,500.	
Credit card rewards	391.		
Total	-42,109.	-42,500.	

Form 990-PF: Return of Private Foundation

Taxes

Continuation Statement

Description	Revenue and Expense per Book	Net Investment Income	Adjusted Net Income	Disbursement for charitable purpose
Payroll taxes/fees	18,333.	5,522.		12,811.
Total	18,333.	5,522.		12,811.

Form 990-PF: Return of Private Foundation

Other Expenses

Continuation Statement

Description	Revenue and Expense per Book	Net Investment Income	Adjusted Net Income	Disbursement for charitable purpose
Office expenses	20,764.	10,382.		10,382.
Total	20,764.	10,382.		10,382.

Name John Edward Fowler Memorial Foundation	Employer Identification No. 51-6019469
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Asset Information:

Description of Property Schwab x2507
Business Code _____ Exclusion Code . . . 18
Date Acquired various How Acquired . Purchased
Date Sold various Name of Buyer . 13
Check Box, if Buyer is a Business . . .
Sales Price 858,269 Cost or other basis (do not reduce by depreciation) . .
Sales Expense 0 Valuation Method . . .
Total Gain (Loss) 858,269 Accumulated Depreciation

Description of Property Schwab x 7436
Business Code _____ Exclusion Code . . . 18
Date Acquired various How Acquired . Purchased
Date Sold various Name of Buyer .
Check Box, if Buyer is a Business . . .
Sales Price 92,806 Cost or other basis (do not reduce by depreciation) . .
Sales Expense Valuation Method . . .
Total Gain (Loss) 92,806 Accumulated Depreciation

Description of Property
Business Code _____ Exclusion Code . . .
Date Acquired How Acquired .
Date Sold Name of Buyer .
Check Box, if Buyer is a Business . . .
Sales Price Cost or other basis (do not reduce by depreciation) . .
Sales Expense Valuation Method . . .
Total Gain (Loss) Accumulated Depreciation

Description of Property
Business Code _____ Exclusion Code . . .
Date Acquired How Acquired .
Date Sold Name of Buyer .
Check Box, if Buyer is a Business . . .
Sales Price Cost or other basis (do not reduce by depreciation) . .
Sales Expense Valuation Method . . .
Total Gain (Loss) Accumulated Depreciation

Description of Property
Business Code _____ Exclusion Code . . .
Date Acquired How Acquired .
Date Sold Name of Buyer .
Check Box, if Buyer is a Business . . .
Sales Price Cost or other basis (do not reduce by depreciation) . .
Sales Expense Valuation Method . . .
Total Gain (Loss) Accumulated Depreciation

Totals:

Total Gain (Loss) of all assets 951,075 .
Gross Sales Price of all assets 951,075 .
Unrelated Business Income Business Code .
Excluded by section 512, 513, 514 951,075 Exclusion Code . 18
Related/Exempt Function Income

QuickZoom here to Form 990-PF, Page 1 ▶
QuickZoom here to Form 990-PF, Page 12 ▶

Name John Edward Fowler Memorial Foundation	Employer Identification No. 51-6019469
------------------------------------------------	-------------------------------------------

Line 16a - Legal Fees

Name of Provider	Type of Service Provided	Amount Paid Per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Total to Form 990-PF, Part I, Line 16a					

Line 16b - Accounting Fees

Name of Provider	Type of Service Provided	Amount Paid Per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Total to Form 990-PF, Part I, Line 16b					

Line 16c - Other Professional Fees

Name of Provider	Type of Service Provided	Amount Paid Per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEG fees	Investment	27,437.	27,437.		
Springreef	Investment	500.	500.		
Total to Form 990-PF, Part I, Line 16c		27,937.	27,937.		

Name John Edward Fowler Memorial Foundation	Employer Identification No. 51-6019469
------------------------------------------------	-------------------------------------------

Line 10a - Investments - US and State Government Obligations:	End of Year		End of Year	
	State and Local Obligations Book Value	State and Local Obligations FMV	US Government Obligations Book Value	US Government Obligations FMV
Tot to Fm 990-PF, Pt II, Ln 10a				

Line 10b - Investments - Corporate Stock:	End of Year	
	Book Value	Fair Market Value
Schwab	49,241,662.	49,241,662.
Schwab Def Comp	807,673.	807,673.
Totals to Form 990-PF, Part II, Line 10b	50,049,335.	50,049,335.

Line 10c - Investments - Corporate Bonds:	End of Year	
	Book Value	Fair Market Value
Totals to Form 990-PF, Part II, Line 10c		

Line 12 - Investments - Mortgage loans:	End of Year	
	Book Value	Fair Market Value
Totals to Form 990-PF, Part II, Line 12		

Line 13 - Investments - Other:	End of Year	
	Book Value	Fair Market Value
FEG POF III	4,097,960.	4,097,960.
FEG POF IV	3,150,108.	3,150,108.
FEG AAF I	9,367,149.	9,367,149.
Totals to Form 990-PF, Part II, Line 13	16,615,217.	16,615,217.

Department of the Treasury
Internal Revenue Service

▶ **Attach to the corporation's tax return.**

▶ **Go to www.irs.gov/Form2220 for instructions and the latest information.**

2020

Name John Edward Fowler Memorial Foundation	Employer identification number 51-6019469
------------------------------------------------	----------------------------------------------

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

1 Total tax (see instructions)		1	27,792.
2a Personal holding company tax (Schedule PH (Form 1120), line 26) included on line 1	2a		
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	2b		
c Credit for federal tax paid on fuels (see instructions)	2c		
d Total. Add lines 2a through 2c		2d	
3 Subtract line 2d from line 1. If the result is less than \$500, do not complete or file this form. The corporation does not owe the penalty		3	27,792.
4 Enter the tax shown on the corporation's 2019 income tax return. See instructions. 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		4	23,640.
5 Required annual payment. Enter the smaller of line 3 or line 4. If the corporation is required to skip line 4, enter the amount from line 3		5	23,640.

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)
9 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	9	05/15/20	07/15/20	09/15/20	12/15/20
10 Required installments. 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	10	5,910.	5,910.	5,910.	5,910.
11 Estimated tax paid or credited for each period. For column (a) only, enter the amount from line 11 on line 15. See instructions	11	16,599.			
Complete lines 12 through 18 of one column before going to the next column.					
12 Enter amount, if any, from line 18 of the preceding column	12		10,689.	4,779.	
13 Add lines 11 and 12	13		10,689.	4,779.	
14 Add amounts on lines 16 and 17 of the preceding column	14			0.	1,131.
15 Subtract line 14 from line 13. If zero or less, enter -0-	15	16,599.	10,689.	4,779.	0.
16 If the amount on line 15 is zero, subtract line 13 from line 14. Otherwise, enter -0-	16		0.	0.	
17 Underpayment. 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	17			1,131.	5,910.
18 Overpayment. If line 10 is less than line 15, subtract line 10 from line 15. Then go to line 12 of the next column	18	10,689.	4,779.		

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)
19 Enter the date of payment or the 15th day of the 4th month after the close of the tax year, whichever is earlier. (C corporations with tax years ending June 30 and S corporations: Use 3rd month instead of 4th month. Form 990-PF and Form 990-T filers: Use 5th month instead of 4th month.) See instructions	19	See Stmt		
20 Number of days from due date of installment on line 9 to the date shown on line 19	20			
21 Number of days on line 20 after 4/15/2020 and before 7/1/2020	21			
22 Underpayment on line 17 × $\frac{\text{Number of days on line 21}}{366} \times 5\% (0.05)$	22	\$	\$	\$
23 Number of days on line 20 after 6/30/2020 and before 10/1/2020	23			
24 Underpayment on line 17 × $\frac{\text{Number of days on line 23}}{366} \times 3\% (0.03)$	24	\$	\$	\$
25 Number of days on line 20 after 9/30/2020 and before 1/1/2021	25			
26 Underpayment on line 17 × $\frac{\text{Number of days on line 25}}{366} \times 3\% (0.03)$	26	\$	\$	\$
27 Number of days on line 20 after 12/31/2020 and before 4/1/2021	27			
28 Underpayment on line 17 × $\frac{\text{Number of days on line 27}}{365} \times 3\% (0.03)$	28	\$	\$	\$
29 Number of days on line 20 after 3/31/2021 and before 7/1/2021	29			
30 Underpayment on line 17 × $\frac{\text{Number of days on line 29}}{365} \times *%$	30	\$	\$	\$
31 Number of days on line 20 after 6/30/2021 and before 10/1/2021	31			
32 Underpayment on line 17 × $\frac{\text{Number of days on line 31}}{365} \times *%$	32	\$	\$	\$
33 Number of days on line 20 after 9/30/2021 and before 1/1/2022	33			
34 Underpayment on line 17 × $\frac{\text{Number of days on line 33}}{365} \times *%$	34	\$	\$	\$
35 Number of days on line 20 after 12/31/2021 and before 3/16/2022	35			
36 Underpayment on line 17 × $\frac{\text{Number of days on line 35}}{365} \times *%$	36	\$	\$	\$
37 Add lines 22, 24, 26, 28, 30, 32, 34, and 36	37	\$	\$	\$
38 Penalty. 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.	38	\$		95.

*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. You can also call 1-800-829-4933 to get interest rate information.

Schedule A Adjusted Seasonal Installment Method and Annualized Income Installment Method

See instructions.

Form 1120-S filers: For lines 1, 2, 3, and 21, "taxable income" refers to excess net passive income or the amount on which tax is imposed under section 1374(a), whichever applies.

Part I Adjusted Seasonal Installment Method

Caution: Use this method only if the base period percentage for any 6 consecutive months is at least 70%. See instructions.

		(a)	(b)	(c)	(d)
		First 3 months	First 5 months	First 8 months	First 11 months
1	Enter taxable income for the following periods.				
a	Tax year beginning in 2017	1a			
b	Tax year beginning in 2018	1b			
c	Tax year beginning in 2019	1c			
2	Enter taxable income for each period for the tax year beginning in 2020. See the instructions for the treatment of extraordinary items	2			
3	Enter taxable income for the following periods.	First 4 months	First 6 months	First 9 months	Entire year
a	Tax year beginning in 2017	3a			
b	Tax year beginning in 2018	3b			
c	Tax year beginning in 2019	3c			
4	Divide the amount in each column on line 1a by the amount in column (d) on line 3a	4			
5	Divide the amount in each column on line 1b by the amount in column (d) on line 3b	5			
6	Divide the amount in each column on line 1c by the amount in column (d) on line 3c	6			
7	Add lines 4 through 6	7			
8	Divide line 7 by 3.0	8			
9a	Divide line 2 by line 8	9a			
b	Extraordinary items (see instructions)	9b			
c	Add lines 9a and 9b	9c			
10	Figure the tax on the amount on line 9c using the instructions for Form 1120, Schedule J, line 2, or comparable line of corporation's return	10			
11a	Divide the amount in columns (a) through (c) on line 3a by the amount in column (d) on line 3a	11a			
b	Divide the amount in columns (a) through (c) on line 3b by the amount in column (d) on line 3b	11b			
c	Divide the amount in columns (a) through (c) on line 3c by the amount in column (d) on line 3c	11c			
12	Add lines 11a through 11c	12			
13	Divide line 12 by 3.0	13			
14	Multiply the amount in columns (a) through (c) of line 10 by columns (a) through (c) of line 13. In column (d), enter the amount from line 10, column (d)	14			
15	Enter any alternative minimum tax (trusts only) for each payment period. See instructions	15			
16	Enter any other taxes for each payment period. See instructions	16			
17	Add lines 14 through 16	17			
18	For each period, enter the same type of credits as allowed on Form 2220, lines 1 and 2c. See instructions	18			
19	Total tax after credits. Subtract line 18 from line 17. If zero or less, enter -0-	19			

Part II Annualized Income Installment Method

		(a)	(b)	(c)	(d)
		First _____ months	First _____ months	First _____ months	First _____ months
20	Annualization periods (see instructions)	20			
21	Enter taxable income for each annualization period. See instructions for the treatment of extraordinary items	21			
22	Annualization amounts (see instructions)	22			
23a	Annualized taxable income. Multiply line 21 by line 22	23a			
b	Extraordinary items (see instructions)	23b			
c	Add lines 23a and 23b	23c			
24	Figure the tax on the amount on line 23c using the instructions for Form 1120, Schedule J, line 2, or comparable line of corporation's return	24			
25	Enter any alternative minimum tax (trusts only) for each payment period (see instructions)	25			
26	Enter any other taxes for each payment period. See instructions	26			
27	Total tax. Add lines 24 through 26	27			
28	For each period, enter the same type of credits as allowed on Form 2220, lines 1 and 2c. See instructions	28			
29	Total tax after credits. Subtract line 28 from line 27. If zero or less, enter -0-	29			
30	Applicable percentage	30	25%	50%	75%
31	Multiply line 29 by line 30	31			

Part III Required Installments

		1st	2nd	3rd	4th
		installment	installment	installment	installment
	Note: Complete lines 32 through 38 of one column before completing the next column.				
32	If only Part I or Part II is completed, enter the amount in each column from line 19 or line 31. If both parts are completed, enter the smaller of the amounts in each column from line 19 or line 31	32			
33	Add the amounts in all preceding columns of line 38. See instructions	33			
34	Adjusted seasonal or annualized income installments. Subtract line 33 from line 32. If zero or less, enter -0-	34			
35	Enter 25% (0.25) of line 5 on page 1 of Form 2220 in each column. Note: "Large corporations," see the instructions for line 10 for the amounts to enter	35			
36	Subtract line 38 of the preceding column from line 37 of the preceding column	36			
37	Add lines 35 and 36	37			
38	Required installments. Enter the smaller of line 34 or line 37 here and on page 1 of Form 2220, line 10. See instructions	38			

Depreciation and Amortization
(Including Information on Listed Property)

Department of the Treasury
Internal Revenue Service (99)

▶ Attach to your tax return.

▶ Go to www.irs.gov/Form4562 for instructions and the latest information.

Name(s) shown on return John Edward Fowler Memorial Foundation	Business or activity to which this form relates Form 990-PF page 1	Identifying number 51-6019469
-------------------------------------------------------------------	-----------------------------------------------------------------------	----------------------------------

Part I Election To Expense Certain Property Under Section 179

Note: If you have any listed property, complete Part V before you complete Part I.

1 Maximum amount (see instructions)	1	
2 Total cost of section 179 property placed in service (see instructions)	2	
3 Threshold cost of section 179 property before reduction in limitation (see instructions)	3	
4 Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0-	4	
5 Dollar limitation for tax year. Subtract line 4 from line 1. If zero or less, enter -0-. If married filing separately, see instructions	5	
6 (a) Description of property	(b) Cost (business use only)	(c) Elected cost
7 Listed property. Enter the amount from line 29	7	
8 Total elected cost of section 179 property. Add amounts in column (c), lines 6 and 7	8	
9 Tentative deduction. Enter the smaller of line 5 or line 8	9	
10 Carryover of disallowed deduction from line 13 of your 2019 Form 4562	10	
11 Business income limitation. Enter the smaller of business income (not less than zero) or line 5. See instructions	11	
12 Section 179 expense deduction. Add lines 9 and 10, but don't enter more than line 11	12	
13 Carryover of disallowed deduction to 2021. Add lines 9 and 10, less line 12 ▶	13	

Note: Don't use Part II or Part III below for listed property. Instead, use Part V.

Part II Special Depreciation Allowance and Other Depreciation (Don't include listed property. See instructions.)

14 Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year. See instructions	14	
15 Property subject to section 168(f)(1) election	15	
16 Other depreciation (including ACRS)	16	

Part III MACRS Depreciation (Don't include listed property. See instructions.)

Section A

17 MACRS deductions for assets placed in service in tax years beginning before 2020	17	750.
18 If you are electing to group any assets placed in service during the tax year into one or more general asset accounts, check here <input type="checkbox"/>		

Section B—Assets Placed in Service During 2020 Tax Year Using the General Depreciation System

(a) Classification of property	(b) Month and year placed in service	(c) Basis for depreciation (business/investment use only—see instructions)	(d) Recovery period	(e) Convention	(f) Method	(g) Depreciation deduction
19a 3-year property						
b 5-year property		425.	5.0 yrs	HY	S/L	43.
c 7-year property						
d 10-year property						
e 15-year property						
f 20-year property						
g 25-year property			25 yrs.		S/L	
h Residential rental property			27.5 yrs.	MM	S/L	
			27.5 yrs.	MM	S/L	
i Nonresidential real property			39 yrs.	MM	S/L	
				MM	S/L	

Section C—Assets Placed in Service During 2020 Tax Year Using the Alternative Depreciation System

20a Class life						
b 12-year			12 yrs.		S/L	
c 30-year			30 yrs.	MM	S/L	
d 40-year			40 yrs.	MM	S/L	

Part IV Summary (See instructions.)

21 Listed property. Enter amount from line 28	21	
22 Total. Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21. Enter here and on the appropriate lines of your return. Partnerships and S corporations—see instructions	22	793.
23 For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs	23	

IRS e-file Signature Authorization for an Exempt Organization

For calendar year 2020, or fiscal year beginning _____, 2020, and ending _____, 20_____

Department of the Treasury
Internal Revenue Service

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

2020

Name of exempt organization or person subject to tax John Edward Fowler Memorial Foundation	Taxpayer identification number 51-6019469
Name and title of officer or person subject to tax Jeffery P Capron, President	

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.

1a Form 990 check here <input type="checkbox"/>	b Total revenue , if any (Form 990, Part VIII, column (A), line 12)	1b _____
2a Form 990-EZ check here <input type="checkbox"/>	b Total revenue , if any (Form 990-EZ, line 9)	2b _____
3a Form 1120-POL check here <input type="checkbox"/>	b Total tax (Form 1120-POL, line 22)	3b _____
4a Form 990-PF check here <input checked="" type="checkbox"/>	b Tax based on investment income (Form 990-PF, Part VI, line 5)	4b <u>27,792.</u>
5a Form 8868 check here <input type="checkbox"/>	b Balance due (Form 8868, line 3c)	5b _____
6a Form 990-T check here <input type="checkbox"/>	b Total tax (Form 990-T, Part III, line 4)	6b _____
7a Form 4720 check here <input type="checkbox"/>	b Total tax (Form 4720, Part III, line 1)	7b _____

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

Under penalties of 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 _____ to enter my PIN

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 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 **07/26/2021**

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.

2	7	3	4	9	4	3	3	3	3
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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 Date **07/26/2021**

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

Additional information from your 2020 Federal Exempt Tax Return

Form 990-PF: Return of Private Foundation

Line 15(a)

Itemization Statement

Description	Amount
RHL Def Comp payment	40,000.
Total	40,000.

Form 990-PF: Return of Private Foundation

Line 9(b)

Itemization Statement

Description	Amount
Prepaid excise tax	28,359.
Total	28,359.