

Form **990-T**

EXTENDED TO OCTOBER 15, 2021
Exempt Organization Business Income Tax Return
(and proxy tax under section 6033(e))

For calendar year 2019 or other tax year beginning **DEC 1, 2019** and ending **NOV 30, 2020**

2019

Department of the Treasury
Internal Revenue Service

Go to www.irs.gov/Form990T for instructions and the latest information
Do not enter SSN numbers on this form as it may be made public if your organization is a 501(c)(3)

Open to Public Inspection for 501(c)(3) Organizations Only

A <input type="checkbox"/> Check box if address changed	Print or Type	Name of organization (<input type="checkbox"/> Check box if name changed and see instructions)	D Employer identification number (Employees' trust, see instructions)
B Exempt under section <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 408(e) <input type="checkbox"/> 220(e) <input type="checkbox"/> 408A <input type="checkbox"/> 530(a) <input type="checkbox"/> 529(a)		THE NEUBAUER FAMILY FOUNDATION	25-6627704
		Number, street, and room or suite no. If a P.O. box, see instructions 1717 ARCH ST, NO. 4050	E Unrelated business activity code (See instructions)
C Book value of all assets at end of year 343,181,330.		City or town, state or province, country, and ZIP or foreign postal code PHILADELPHIA, PA 19103-2793	525990
		F Group exemption number (See instructions.)	
		G Check organization type <input type="checkbox"/> 501(c) corporation <input checked="" type="checkbox"/> 501(c) trust <input type="checkbox"/> 401(a) trust <input type="checkbox"/> Other trust	

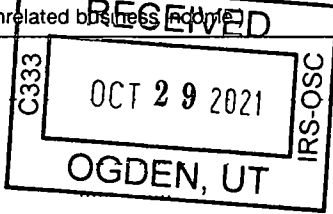
H Enter the number of the organization's unrelated trades or businesses. **1** Describe the only (or first) unrelated trade or business here **SEE STATEMENT 14**. If only one, complete Parts I-V. If more than one, describe the first in the blank space at the end of the previous sentence, complete Parts I and II, complete a Schedule M for each additional trade or business, then complete Parts III-V.

I During the tax year, was the corporation a subsidiary in an affiliated group or a parent-subsidiary controlled group? Yes No
If "Yes," enter the name and identifying number of the parent corporation.

J The books are in care of **BAKER TILLY US, LLP, CPA'S** Telephone number **215-972-0701**

Part I Unrelated Trade or Business Income		(A) Income	(B) Expenses	(C) Net
1 a	Gross receipts or sales			
b	Less returns and allowances			
c	Balance	1c		
2	Cost of goods sold (Schedule A, line 7)	2		
3	Gross profit. Subtract line 2 from line 1c	3		
4 a	Capital gain net income (attach Schedule D)	4a	720,435.	720,435.
b	Net gain (loss) (Form 4797, Part II, line 17) (attach Form 4797)	4b		
c	Capital loss deduction for trusts	4c		
5	Income (loss) from a partnership or an S corporation (attach statement)	5	854,194. STMT 15	854,194.
6	Rent income (Schedule C)	6		
7	Unrelated debt-financed income (Schedule E)	7		
8	Interest, annuities, royalties, and rents from a controlled organization (Schedule F)	8		
9	Investment income of a section 501(c)(7), (9), or (17) organization (Schedule G)	9		
10	Exploited exempt activity income (Schedule I)	10		
11	Advertising income (Schedule J)	11		
12	Other income (See instructions, attach schedule)	12		
13	Total. Combine lines 3 through 12	13	1,574,629.	1,574,629.

Part II Deductions Not Taken Elsewhere (See instructions for limitations on deductions)		(Deductions must be directly connected with the unrelated business activity)	
14	Compensation of officers, directors, and trustees (Schedule K)	14	
15	Salaries and wages	15	
16	Repairs and maintenance	16	
17	Bad debts	17	
18	Interest (attach schedule) (see instructions)	18	
19	Taxes and licenses	19	
20	Depreciation (attach Form 4562)	20	
21	Less depreciation claimed on Schedule A and elsewhere on return	21a	
22	Depletion	22	
23	Contributions to deferred compensation plans	23	
24	Employee benefit programs	24	
25	Excess exempt expenses (Schedule I)	25	
26	Excess readership costs (Schedule J)	26	
27	Other deductions (attach schedule)	27	33,254.
28	Total deductions Add lines 14 through 27	28	33,254.
29	Unrelated business taxable income before net operating loss deduction Subtract line 28 from line 13	29	1,541,375.
30	Deduction for net operating loss arising in tax years beginning on or after January 1, 2018 (see instructions)	30	0.
31	Unrelated business taxable income. Subtract line 30 from line 29	31	1,541,375.



SEE STATEMENT 16

SCANNED JAN 18 2022

G20

Part III Total Unrelated Business Taxable Income

Table with 3 columns: Line number, Description, and Amount. Includes lines 32-39 for Unrelated Business Taxable Income.

Part IV Tax Computation

Table with 3 columns: Line number, Description, and Amount. Includes lines 40-45 for Tax Computation.

Part V Tax and Payments

Table with 3 columns: Line number, Description, and Amount. Includes lines 46a-56 for Tax and Payments.

Part VI Statements Regarding Certain Activities and Other Information

Table with 3 columns: Question number, Question text, and Yes/No response.

Sign Here: Declaration of preparer, Signature of officer, Date, Title, and IRS discussion box.

Table with 4 columns: Preparer information (Name, Signature, Date, PTIN) and Firm information (Name, Address, EIN, Phone).

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Schedule A - Cost of Goods Sold. Enter method of inventory valuation ► **N/A**

1	Inventory at beginning of year	1		6	Inventory at end of year	6	
2	Purchases	2		7	Cost of goods sold Subtract line 6 from line 5. Enter here and in Part I, line 2		
3	Cost of labor	3		7			
4a	Additional section 263A costs (attach schedule)	4a		8	Do the rules of section 263A (with respect to property produced or acquired for resale) apply to the organization?	Yes	No
b	Other costs (attach schedule)	4b					
5	Total. Add lines 1 through 4b	5					

Schedule C - Rent Income (From Real Property and Personal Property Leased With Real Property)

(see instructions)

1 Description of property

(1)	
(2)	
(3)	
(4)	

2. Rent received or accrued

(a) From personal property (if the percentage of rent for personal property is more than 10% but not more than 50%)	(b) From real and personal property (if the percentage of rent for personal property exceeds 50% or if the rent is based on profit or income)	3(a) Deductions directly connected with the income in columns 2(a) and 2(b) (attach schedule)
(1)		
(2)		
(3)		
(4)		
Total	0.	Total 0.

(c) **Total income** Add totals of columns 2(a) and 2(b). Enter here and on page 1, Part I, line 6, column (A) ►

(b) **Total deductions** Enter here and on page 1, Part I, line 6, column (B) ►

0. 0.

Schedule E - Unrelated Debt-Financed Income (see instructions)

1. Description of debt-financed property	2. Gross income from or allocable to debt-financed property	3 Deductions directly connected with or allocable to debt-financed property		
		(a) Straight line depreciation (attach schedule)	(b) Other deductions (attach schedule)	
(1)				
(2)				
(3)				
(4)				
4. Amount of average acquisition debt on or allocable to debt-financed property (attach schedule)	5 Average adjusted basis of or allocable to debt-financed property (attach schedule)	6 Column 4 divided by column 5	7 Gross income reportable (column 2 x column 6)	8 Allocable deductions (column 6 x total of columns 3(a) and 3(b))
(1)		%		
(2)		%		
(3)		%		
(4)		%		
Totals			Enter here and on page 1, Part I, line 7, column (A) 0.	Enter here and on page 1, Part I, line 7, column (B) 0.
Total dividends-received deductions included in column 8			►	0.

Schedule F - Interest, Annuities, Royalties, and Rents From Controlled Organizations (see instructions)

1 Name of controlled organization	2 Employer identification number	Exempt Controlled Organizations			
		3 Net unrelated income (loss) (see instructions)	4 Total of specified payments made	5 Part of column 4 that is included in the controlling organization's gross income	6 Deductions directly connected with income in column 5
(1)					
(2)					
(3)					
(4)					

Nonexempt Controlled Organizations

7 Taxable income	8 Net unrelated income (loss) (see instructions)	9 Total of specified payments made	10 Part of column 9 that is included in the controlling organization's gross income	11 Deductions directly connected with income in column 10
(1)				
(2)				
(3)				
(4)				
Totals			Add columns 5 and 10 Enter here and on page 1, Part I, line 8, column (A)	Add columns 6 and 11 Enter here and on page 1, Part I, line 8, column (B)
			0.	0.

Schedule G - Investment Income of a Section 501(c)(7), (9), or (17) Organization (see instructions)

1 Description of income	2 Amount of income	3 Deductions directly connected (attach schedule)	4 Set-asides (attach schedule)	5 Total deductions and set-asides (col 3 plus col 4)
(1)				
(2)				
(3)				
(4)				
Totals		Enter here and on page 1, Part I, line 9, column (A)		Enter here and on page 1, Part I, line 9, column (B)
		0.		0.

Schedule I - Exploited Exempt Activity Income, Other Than Advertising Income (see instructions)

1 Description of exploited activity	2 Gross unrelated business income from trade or business	3 Expenses directly connected with production of unrelated business income	4 Net income (loss) from unrelated trade or business (column 2 minus column 3) If a gain, compute cols 5 through 7	5 Gross income from activity that is not unrelated business income	6 Expenses attributable to column 5	7 Excess exempt expenses (column 6 minus column 5, but not more than column 4)
(1)						
(2)						
(3)						
(4)						
Totals		Enter here and on page 1, Part I, line 10, col (A)	Enter here and on page 1, Part I, line 10, col (B)			Enter here and on page 1, Part II, line 25
		0.	0.			0.

Schedule J - Advertising Income (see instructions)

Part I Income From Periodicals Reported on a Consolidated Basis

1 Name of periodical	2 Gross advertising income	3 Direct advertising costs	4 Advertising gain or (loss) (col 2 minus col 3) If a gain, compute cols 5 through 7	5 Circulation income	6 Readership costs	7 Excess readership costs (column 6 minus column 5, but not more than column 4)
(1)						
(2)						
(3)						
(4)						
Totals (carry to Part II, line (5))		0.	0.			0.

Part II **Income From Periodicals Reported on a Separate Basis** (For each periodical listed in Part II, fill in columns 2 through 7 on a line-by-line basis)

1 Name of periodical	2 Gross advertising income	3 Direct advertising costs	4 Advertising gain or (loss) (col 2 minus col 3) If a gain, compute cols 5 through 7	5 Circulation income	6 Readership costs	7 Excess readership costs (column 6 minus column 5, but not more than column 4)
(1)						
(2)						
(3)						
(4)						
Totals from Part I	0.	0.				0.
Totals, Part II (lines 1-5)	0. <small>Enter here and on page 1, Part I, line 11, col (A)</small>	0. <small>Enter here and on page 1, Part I, line 11, col (B)</small>				0. <small>Enter here and on page 1, Part II, line 26</small>

Schedule K - Compensation of Officers, Directors, and Trustees (see instructions)

1. Name	2 Title	3 Percent of time devoted to business	4 Compensation attributable to unrelated business
(1)		%	
(2)		%	
(3)		%	
(4)		%	
Total Enter here and on page 1, Part II, line 14			0.

FORM 990-T	DESCRIPTION OF ORGANIZATION'S PRIMARY UNRELATED BUSINESS ACTIVITY	STATEMENT 14
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ONLY UBTI IS PASS-THROUGH AMOUNTS FROM INVESTMENT PARTNERSHIPS

TO FORM 990-T, PAGE 1

FORM 990-T	INCOME (LOSS) FROM PARTNERSHIPS	STATEMENT 15
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DESCRIPTION	NET INCOME OR (LOSS)
NEXT EGG INVESTMENTS (NFF). LP - ORDINARY BUSINESS INCOME (LOSS)	854,194.
TOTAL INCLUDED ON FORM 990-T, PAGE 1, LINE 5	854,194.

FORM 990-T	OTHER DEDUCTIONS	STATEMENT 16
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DESCRIPTION	AMOUNT
PROFESSIONAL FEES - ACCOUNTING	33,254.
TOTAL TO FORM 990-T, PAGE 1, LINE 27	33,254.

FORM 990-T	CONTRIBUTIONS	STATEMENT 17
DESCRIPTION/KIND OF PROPERTY	METHOD USED TO DETERMINE FMV	AMOUNT
AIREDALE RESCUE AND ADOPTION OF THE DELAWARE VALLEY	N/A	500.
AMERICAN ACADEMY OF ARTS AND SCIENCES	N/A	30,650.
AMERICAN FRIENDS OF HEBREW UNIVERSITY	N/A	800,000.
AMERICAN FRIENDS OF HEBREW UNIVERSITY	N/A	37,869.
AMERICAN FRIENDS OF TECHNION	N/A	400,000.
AMERICAN FRIENDS OF TEL AVIV UNIVERSITY	N/A	690,000.
AMERICAN PHILOSOPHICAL SOCIETY	N/A	25,000.
ARTIS	N/A	10,000.
ASIA SOCIETY	N/A	2,500.
ASSOCIATION FOR PUBLIC ART	N/A	1,000.
ATTIC YOUTH CENTER	N/A	750.
BARTRAM GARDENS	N/A	500.
BETH DAVID REFORM CONGREGATION	N/A	37,500.
BETH ZION BETH ISRAEL TEMPLE	N/A	5,000.
BIG PICTURE PHILADELPHIA	N/A	7,279.
BRANDEIS UNIVERSITY	N/A	62,500.
BRIDLEWILD TRAILS ASSOCIATION	N/A	1,500.
BROAD STREET MINISTRY	N/A	82,500.
CENTRAL PARK CONSERVATORY	N/A	5,000.
CHOP FOUNDATION	N/A	3,000.
COMMISSION ON ACCREDIATION OF HOME	N/A	5,000.
COMMITTEE OF SEVENTY	N/A	41,000.
COMMON MARKET PHILADELPHIA INC.	N/A	1,000.
COMMUNITY PARTNERSHIP SCHOOL	N/A	9,000.
CORONA YOUTH MUSIC PROJECT	N/A	500.
CP 2023	N/A	843,041.
CRADLES TO CRAYONS	N/A	200.
CURTIS INSTITUTE OF MUSIC	N/A	10,000.
DELAWARE CANAL 21	N/A	1,000.
DIGDEEP WATER	N/A	750.
DNDOMETRIOSIS ASSOCIATION	N/A	1,060.
DREXEL UNIVERSITY	N/A	7,500.
DUKE UNIVERSITY	N/A	50,000.
EDEN VILLAGE CAMP	N/A	3,000.
EDUCATION LAW CENTER	N/A	3,000.
EPISCOPAL ACADEMY	N/A	15,000.
EQUAL JUSTICE INITIATIVE	N/A	2,000.
FAMILY FORWARD PHILADELPHIA	N/A	750.
FOOD MOXIE	N/A	500.
FOUNDATION FIGHTING BLINDNESS	N/A	100,000.
FOUNDATION FOR CONTEMPORARY ARTS	N/A	1,000.
FOUNDATION FOR JEWISH CAMP	N/A	50,000.
FOUNDATION FOR SHREWSBURY EDUCATION	N/A	3,000.
FRANKLIN & MARSHALL COLLEGE	N/A	1,500.

THE NEUBAUER FAMILY FOUNDATION

25-6627704

FRIENDS CENTRAL SCHOOL	N/A	99,750.
FRIENDS OF BACHE-MARTIN	N/A	12,500.
FRIENDS OF COMPASS	N/A	15,000.
FRIENDS OF RITTENHOUSE SQUARE	N/A	3,000.
FRIENDS OF YEMIN ORDE	N/A	22,500.
FRIENDS SELECT SCHOOL	N/A	100.
GERMANTOWN FRIENDS SCHOOL	N/A	3,000.
GERSHMAN PHILA JEWISH FILM FESTIVAL	N/A	10,000.
GLADWYNE FIRE COMPANY	N/A	750.
GLADWYNE FREE LIBRARY	N/A	1,200.
GLOBAL LEADERSHIP ACADEMY	N/A	12,500.
GREATER PHILA CHAMBER OF COMMERCE	N/A	6,500.
HADASSAH	N/A	3,000.
HARLEM LACROSSE	N/A	1,500.
HEART OF LOS ANGELES YOUTH, INC.	N/A	1,000.
HOMEFRONT	N/A	472.
HORATIO ALGER ASSOCIATION OF DISTINGUISHED AMERICANS	N/A	320,000.
HUNTINGTON THEATRE COMPANY	N/A	5,000.
INTERFAITH HOSPITALITY NETWORK OF THE MAIN LINE	N/A	3,000.
JAMES A MICHENER ART MUSEUM	N/A	5,000.
JEWISH MUSEUM NEW YORK	N/A	425,000.
JUMP CUT	N/A	6,000.
JUNEAU ALASKA MUSIC MATTERS	N/A	500.
JUVENILE DIABETES RESEARCH FOUNDATION	N/A	1,800.
KIPP ADMINISTRATIVE SERVICES	N/A	15,530.
LEHIGH VALLEY PUBLIC TELECOMMUNICATIONS	N/A	600,000.
LIBERTY TROOP BENEFACTORS LTD	N/A	3,000.
LIBRARY COMPANY OF PHILADELPHIA	N/A	5,500.
LOWER MERION FRATERAL ORDER OF POLICE	N/A	2,250.
LOWER MERION POLICE PENSION ASSN	N/A	750.
MASTERY CHARTER SCHOOLS FOUNDATION	N/A	2,000.
METROPOLITAN BALLET COMPANY	N/A	250.
METROPOLITAN OPERA	N/A	25,000.
MIDDLE EAST FORUM	N/A	2,500.
MISSION KIDS CHILD ADVOCACY	N/A	3,000.
MOORE COLLEGE OF ART & DESIGN	N/A	5,000.
MORRISON SCHOOL	N/A	11,995.
MOVING TRADITIONS	N/A	3,000.
MUSEUM OF MODERN ART	N/A	3,000.
MUSEUM OF THE AMERICAN REVOLUTION	N/A	10,000.
NAACP LEGAL DEFENSE AND EDUCATIONAL FUND, INC.	N/A	300.
NATIONAL CONSTITUTION CENTER	N/A	50,000.
NATIONAL MULTIPLE SCLEROSIS SOCIETY	N/A	9,000.

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25-6627704

NATIONAL MUSEUM OF AMERICAN JEWISH HISTOR	N/A	10,000.
NATIONAL TRAINING NETWORK	N/A	65,875.
NATIONALITY SERVICES CENTER	N/A	5,400.
NEUE GALERIE NEW YORK	N/A	9,000.
NEW LEASH ON LIFE USA	N/A	500.
NEW VENTURE FUND	N/A	25,000.
NEW YORK PUBLIC RADIO WQXR	N/A	5,000.
NEXTBOOK, INC.	N/A	3,600.
OPERA PHILADELPHIA	N/A	15,000.
OPERAAMERICA	N/A	10,000.
OUR CLOSET	N/A	6,000.
PA ALLIANCE FOUNDATION	N/A	50,000.
PENNSYLVANIA HORTICULTURAL SOCIETY	N/A	10,000.
PENNSYLVANIA INNOCENCE PROJECT	N/A	2,000.
PEOPLE'S LIGHT AND THEATRE CO	N/A	50,000.
PETER'S PLACE	N/A	1,500.
PHILABUNDANCE	N/A	3,200.
PHILADELPHIA ACADEMY OF SCHOOL LEADERS	N/A	249,050.
PHILADELPHIA POLICE FOUNDATION	N/A	47,500.
PHILADELPHIA ROBOTICS COALITION	N/A	25,000.
PHILADELPHIA YOUTH ORCHESTRA	N/A	500.
PINEMERE	N/A	18,000.
PLANNED PARENTHOOD FEDERATION OF AMERICA	N/A	3,000.
PLEASE TOUCH MUSEUM	N/A	93,750.
POINT PLEASANT FIRE COMPANY #1	N/A	750.
POLICE ATHLETIC LEAGUE OF PHILADELPHIA	N/A	1,000.
PRESIDENT & FELLOWS HARVARD COLLEGE	N/A	100,000.
PROJECT H.O.M.E.	N/A	123,000.
PUBLIC CITIZENS FOR CHILDREN & YOUTH	N/A	55,000.
REACH OUT AND READ, INC.	N/A	3,000.
RESEARCH FOR ACTION	N/A	50,000.
RICHMOND SCHOOL	N/A	8,450.
RIVERBEND ENVIRONMENTAL EDUCATION CENTER	N/A	3,000.
SCHOOL DISTRICT OF PHILADELPHIA	N/A	30,600.
SENIOR LAW CENTER	N/A	2,000.
SETTLEMENT MUSIC SCHOOL	N/A	5,000.
SHOFUSO	N/A	1,000.
SMITHSONIAN NMAAHC	N/A	10,000.
SOCIAL IMPACT CENTER	N/A	7,500.
SOUTHERN POVERTY LAW CENTER	N/A	1,500.
SPEAK UP	N/A	750.
SPECIAL OLYMPICS	N/A	25,000.
ST PAUL'S LUTHERN CHURCH	N/A	1,500.
STEPHEN GAYNOR SCHOOL	N/A	400,025.
SWEET DREAM MAKERS	N/A	3,000.
TEMPLE BETH ZION BETH ISRAEL	N/A	36,000.
TEMPLE UNIVERSITY - WRTI	N/A	10,000.
THE ACADEMY OF NATURAL SCIENCE	N/A	5,000.

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25-6627704

THE ASSOCIATED ALUMNI OF CENTRAL HIGH SCHOOL	N/A	2,000.
THE BARNES FOUNDATION	N/A	2,365,000.
THE CARNEGIE HALL SOCIETY	N/A	50,000.
THE CHAPIN SCHOOL	N/A	75,000.
THE CHESTNUT FOUNDATION	N/A	3,000.
THE CITY OF PHILADELPHIA	N/A	251,750.
THE CROSSING	N/A	10,000.
THE FORWARD ASSOCIATION	N/A	5,000.
THE FRANKLIN INSTITUTE	N/A	5,000.
THE FREE LIBRARY OF PHILADELPHIA	N/A	25,000.
THE FUND FOR THE SCHOOL DISTRICT OF PHILADELPHIA	N/A	500.
THE JAISOHN FOUNDATION	N/A	3,000.
THE LOVELAND FOUNDATION	N/A	1,664.
THE PHILADELPHIA ORCHESTRA	N/A	25,000.
THE PINEY WOODS SCHOOL	N/A	1,000.
THE ROCK SCHOOL FOR DANCE EDUCATION	N/A	2,500.
TNTP, INC	N/A	73,963.
TRACE MEDIA, INC.	N/A	360.
TRUSTEES OF THE UNIVERSITY OF PA	N/A	1,291,748.
TUFTS UNIVERSITY	N/A	607,500.
UNITED WAY OF GREATER PHILADELPHIA AND SOUTHERN NJ	N/A	10,000.
UNIVERSITY OF CHICAGO	N/A	12,788,333.
UNIVERSITY OF THE ARTS	N/A	31,008.
VILLAGE OF ARTS & HUMANILIES	N/A	50,000.
VIVIAN BEAUMONT THEATER	N/A	10,000.
WHITNEY MUSEUM OF AMERICAN ART	N/A	1,200.
WHYY	N/A	322,971.
WIDENER UNIVERSITY	N/A	40,707.
WILLIAM H MEREDITH HOME & SCHOOL	N/A	900.
WILLIAN H ZIEGLER ELEMENTARY	N/A	3,903.
WORLDWIDE MUSICIANS UNITED	N/A	3,000.
YOUTH EMPOWERMENT FOR ADVANCEMENT HANGOUT	N/A	90,800.
YOUTH VOLUNTEER CORPS	N/A	12,500.

TOTAL TO FORM 990-T, PAGE 2, LINE 34

24,820,253.

FORM 990-T

CONTRIBUTIONS SUMMARY

STATEMENT 18

CARRYOVER OF PRIOR YEARS UNUSED CONTRIBUTIONS - 60% LIMIT

FOR TAX YEAR 2018

TOTAL CARRYOVER

TOTAL CURRENT YEAR 60% CONTRIBUTIONS

TOTAL CONTRIBUTIONS AVAILABLE

TAXABLE INCOME LIMITATION AS ADJUSTED 924,225

EXCESS 60% CONTRIBUTIONS 0

TOTAL EXCESS CONTRIBUTIONS 0

ALLOWABLE CONTRIBUTIONS DEDUCTION 0

TAXABLE INCOME FOR LIMITATION AFTER 60% CONTRIBUTIONS 1,540,375

CARRYOVER OF PRIOR YEARS UNUSED CONTRIBUTIONS - 50% LIMIT

FOR TAX YEAR 2014

FOR TAX YEAR 2015 17,763,697

FOR TAX YEAR 2016 23,397,221

FOR TAX YEAR 2017 28,172,614

FOR TAX YEAR 2018 24,883,354

TOTAL CARRYOVER 94,216,886

TOTAL CURRENT YEAR 50% CONTRIBUTIONS 24,820,253

TOTAL CONTRIBUTIONS AVAILABLE 119,037,139

TAXABLE INCOME LIMITATION AS ADJUSTED 770,188

EXCESS 50% CONTRIBUTIONS 118,266,951

TOTAL EXCESS CONTRIBUTIONS 118,266,951

ALLOWABLE CONTRIBUTIONS DEDUCTION 770,188

TOTAL CONTRIBUTION DEDUCTION 770,188

**SCHEDULE I
(Form 1041)**

Alternative Minimum Tax - Estates and Trusts

OMB No 1545-0092

Department of the Treasury
Internal Revenue Service

▶ Attach to Form 1041.

▶ Go to www.irs.gov/Form1041 for instructions and the latest information.

2019

Name of estate or trust

Employer identification number

THE NEUBAUER FAMILY FOUNDATION

25-6627704

Part I Estate's or Trust's Share of Alternative Minimum Taxable Income

1	Adjusted total income or (loss) (from Form 1041, line 17) ESBTs , see instructions	1	771,187.
2	Interest	2	
3	Taxes	3	
4	Refund of taxes	4	()
5	Depletion (difference between regular tax and AMT)	5	
6	Net operating loss deduction Enter as a positive amount	6	
7	Interest from specified private activity bonds exempt from the regular tax	7	
8	Qualified small business stock (see instructions)	8	
9	Exercise of incentive stock options (excess of AMT income over regular tax income)	9	
10	Other estates and trusts (amount from Schedule K-1 (Form 1041), box 12, code A)	10	
11	Disposition of property (difference between AMT and regular tax gain or loss)	11	
12	Depreciation on assets placed in service after 1986 (difference between regular tax and AMT)	12	
13	Passive activities (difference between AMT and regular tax income or loss)	13	
14	Loss limitations (difference between AMT and regular tax income or loss)	14	
15	Circulation costs (difference between regular tax and AMT)	15	
16	Long-term contracts (difference between AMT and regular tax income)	16	
17	Mining costs (difference between regular tax and AMT)	17	
18	Research and experimental costs (difference between regular tax and AMT)	18	
19	Income from certain installment sales before January 1, 1987	19	()
20	Intangible drilling costs preference	20	
21	Other adjustments, including income-based related adjustments	21	
22	Alternative tax net operating loss deduction (See the instructions for the limitation that applies)	22	()
23	Adjusted alternative minimum taxable income Combine lines 1 through 22	23	771,187.
Note: Complete Part II below before going to line 24			
24	Income distribution deduction from Part II, line 42	24	N/A
25	Estate tax deduction (from Form 1041, line 19)	25	N/A
26	Add lines 24 and 25	26	
27	Estate's or trust's share of alternative minimum taxable income Subtract line 26 from line 23	27	771,187.

- If line 27 is
- \$25,000 or less, stop here and enter -0- on Form 1041, Schedule G, line 1c The estate or trust isn't liable for the alternative minimum tax
 - Over \$25,000, but less than \$183,500, go to line 43
 - \$183,500 or more, enter the amount from line 27 on line 49 and go to line 50
 - **ESBTs**, see instructions

Part II Income Distribution Deduction on a Minimum Tax Basis

N/A

28	Adjusted alternative minimum taxable income (see instructions)	28	
29	Adjusted tax-exempt interest (other than amounts included on line 7)	29	
30	Total net gain from Schedule D (Form 1041), line 19, column (1) If a loss, enter -0-	30	
31	Capital gains for the tax year allocated to corpus and paid or permanently set aside for charitable purposes (from Form 1041, Schedule A, line 4)	31	
32	Capital gains paid or permanently set aside for charitable purposes from gross income (see instructions)	32	
33	Capital gains computed on a minimum tax basis included on line 23	33	()
34	Capital losses computed on a minimum tax basis included on line 23 Enter as a positive amount	34	
35	Distributable net alternative minimum taxable income (DNAMTI) Combine lines 28 through 34 If zero or less, enter -0-	35	
36	Income required to be distributed currently (from Form 1041, Schedule B, line 9)	36	
37	Other amounts paid, credited, or otherwise required to be distributed (from Form 1041, Schedule B, line 10)	37	
38	Total distributions Add lines 36 and 37	38	
39	Tax-exempt income included on line 38 (other than amounts included on line 7)	39	
40	Tentative income distribution deduction on a minimum tax basis Subtract line 39 from line 38	40	

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

Schedule I (Form 1041) (2019)

Part II Income Distribution Deduction on a Minimum Tax Basis (continued) N/A

41 Tentative income distribution deduction on a minimum tax basis Subtract line 29 from line 35 If zero or less, enter -0-	41	
42 Income distribution deduction on a minimum tax basis. Enter the smaller of line 40 or line 41 Enter here and on line 24	42	

Part III Alternative Minimum Tax

43 Exemption amount		43	\$25,000
44 Enter the amount from line 27	44		
45 Phase-out of exemption amount	45	\$83,500	
46 Subtract line 45 from line 44 If zero or less, enter -0-	46		
47 Multiply line 46 by 25% (0.25)		47	
48 Subtract line 47 from line 43 If zero or less, enter 0-		48	
49 Subtract line 48 from line 44		49	771,187.
50 Go to Part IV of Schedule I to figure line 50 if the estate or trust has qualified dividends or has a gain on lines 18a and 19 of column (2) of Schedule D (Form 1041) (as figured for the AMT, if necessary). Otherwise, if line 49 is: • \$194,800 or less, multiply line 49 by 26% (0.26) • Over \$194,800, multiply line 49 by 28% (0.28) and subtract \$3,896 from the result		50	157,283.
51 Alternative minimum foreign tax credit (see instructions)		51	
52 Tentative minimum tax Subtract line 51 from line 50		52	157,283.
53 Enter the tax from Form 1041, Schedule G, line 1a (minus any foreign tax credit from Schedule G, line 2a)		53	160,853.
54 Alternative minimum tax. Subtract line 53 from line 52 If zero or less, enter -0- Enter here and on Form 1041, Schedule G, line 1c		54	0.

Part IV Line 50 Computation Using Maximum Capital Gains Rates

Caution: If you didn't complete Part V of Schedule D (Form 1041), the Schedule D Tax Worksheet, or the Qualified Dividends Tax Worksheet in the Instructions for Form 1041, see the instructions before completing this part

55 Enter the amount from line 49		55	771,187.
56 Enter the amount from line 26 of Schedule D (Form 1041), line 13 of the Schedule D Tax Worksheet, or line 4 of the Qualified Dividends Tax Worksheet in the Instructions for Form 1041, whichever applies (as figured for the AMT, if necessary)	56	720,435.	
57 Enter the amount from Schedule D (Form 1041), line 18b, column (2) (as figured for the AMT, if necessary) If you didn't complete Schedule D for the regular tax or the AMT, enter -0-	57		
58 If you didn't complete a Schedule D Tax Worksheet for the regular tax or the AMT, enter the amount from line 56 Otherwise, add lines 56 and 57 and enter the smaller of that result or the amount from line 10 of the Schedule D Tax Worksheet (as figured for the AMT, if necessary)	58	720,435.	
59 Enter the smaller of line 55 or line 58		59	720,435.
60 Subtract line 59 from line 55		60	50,752.
61 If line 60 is \$194,800 or less, multiply line 60 by 26% (0.26) Otherwise, multiply line 60 by 28% (0.28) and subtract \$3,896 from the result		61	13,196.
62 Maximum amount subject to the 0% rate	62	\$2,650	
63 Enter the amount from line 27 of Schedule D (Form 1041), line 14 of the Schedule D Tax Worksheet, or line 5 of the Qualified Dividends Tax Worksheet in the Instructions for Form 1041, whichever applies (as figured for the regular tax). If you didn't complete Schedule D or either worksheet for the regular tax, enter the amount from Form 1041, line 23; if zero or less, enter -0-	63	49,752.	
64 Subtract line 63 from line 62 If zero or less, enter -0-	64	0.	
65 Enter the smaller of line 55 or line 56	65	720,435.	
66 Enter the smaller of line 64 or line 65 This amount is taxed at 0%	66		
67 Subtract line 66 from line 65	67	720,435.	

Part IV Line 50 Computation Using Maximum Capital Gains Rates *(continued)*

68	Maximum amount subject to rates below 20%	68	\$12,950		
69	Enter the amount from line 64	69			
70	Enter the amount from line 27 of Schedule D (Form 1041), line 18 of the Schedule D Tax Worksheet, or line 5 of the Qualified Dividends Tax Worksheet, whichever applies (as figured for the regular tax) If you didn't complete Schedule D or either worksheet for the regular tax, enter the amount from Form 1041, line 23, if zero or less, enter -0-	70	49,752.		
71	Add line 69 and line 70	71	49,752.		
72	Subtract line 71 from line 68 If zero or less, enter -0-	72			
73	Enter the smaller of line 67 or 72	73			
74	Multiply line 73 by 15% (0 15)	74			
75	Add lines 66 and 73	75			
If lines 75 and 55 are the same, skip lines 76 through 80 and go to line 81. Otherwise, go to line 76.					
76	Subtract line 75 from line 65	76	720,435.		
77	Multiply line 76 by 20% (0 20)	77		144,087.	
If line 57 is zero or blank, skip lines 78 through 80 and go to line 81. Otherwise, go to line 78.					
78	Add lines 60, 75, and 76	78			
79	Subtract line 78 from line 55	79			
80	Multiply line 79 by 25% (0 25)	80			
81	Add lines 61, 74, 77, and 80	81		157,283.	
82	If line 55 is \$194,800 or less, multiply line 55 by 26% (0 26) Otherwise, multiply line 55 by 28% (0 28) and subtract \$3,896 from the result	82		212,036.	
83	Enter the smaller of line 81 or line 82 here and on line 50.	83		157,283.	

**SCHEDULE D
(Form 1041)**

Capital Gains and Losses

OMB No. 1545-0092

▶ Attach to Form 1041, Form 5227, or Form 990-T

▶ Use Form 8949 to list your transactions for lines 1b, 2, 3, 8b, 9 and 10

▶ Go to www.irs.gov/F1041 for instructions and the latest information

2019

Department of the Treasury
Internal Revenue Service

Name of estate or trust

Employer identification number

THE NEUBAUER FAMILY FOUNDATION

25-6627704

Did you dispose of any investment(s) in a qualified opportunity fund during the tax year?

Yes No

If "Yes," attach Form 8949 and see its instructions for additional requirements for reporting your gain or loss.

Note: Form 5227 filers need to complete only Parts I and II.

Part I Short-Term Capital Gains and Losses-Generally Assets Held One Year or Less (see instructions)

See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part I, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
1 a Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b				
1 b Totals for all transactions reported on Form(s) 8949 with Box A checked				
2 Totals for all transactions reported on Form(s) 8949 with Box B checked				
3 Totals for all transactions reported on Form(s) 8949 with Box C checked				
4 Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824				4
5 Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts				5
6 Short-term capital loss carryover. Enter the amount, if any, from line 9 of the 2018 Capital Loss Carryover Worksheet				6 ()
7 Net short-term capital gain or (loss) Combine lines 1a through 6 in column (h). Enter here and on line 17, column (3) on page 2				7

Part II Long-Term Capital Gains and Losses-Generally Assets Held More Than One Year (see instructions)

See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part II, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
8 a Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b				
8 b Totals for all transactions reported on Form(s) 8949 with Box D checked				
9 Totals for all transactions reported on Form(s) 8949 with Box E checked				
10 Totals for all transactions reported on Form(s) 8949 with Box F checked				
11 Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824				11
12 Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts				12
13 Capital gain distributions				13
14 Gain from Form 4797, Part I				14 720,435.
15 Long-term capital loss carryover. Enter the amount, if any, from line 14 of the 2018 Capital Loss Carryover Worksheet				15 ()
16 Net long-term capital gain or (loss) Combine lines 8a through 15 in column (h). Enter here and on line 18a, column (3) on page 2				16 720,435.

For Paperwork Reduction Act Notice, see the Instructions for Form 1041

Schedule D (Form 1041) 2019

Part-III Summary of Parts I and II		(1) Beneficiaries'	(2) Estate's or trust's	(3) Total
<i>Caution: Read the instructions before completing this part</i>				
17 Net short-term gain or (loss)	17			
18 Net long-term gain or (loss):				
a Total for year	18a		720,435.	720,435.
b Unrecaptured section 1250 gain (see line 18 of the worksheet)	18b			
c 28% rate gain	18c			
19 Total net gain or (loss) Combine lines 17 and 18	19		720,435.	720,435.

Note: If line 19, column (3), is a net gain, enter the gain on Form 1041, line 4 (or Form 990-T, Part I, line 4a) If lines 18a and 19, column (2), are net gains, go to Part V, and don't complete Part IV. If line 19, column (3), is a net loss, complete Part IV and the Capital Loss Carryover Worksheet, as necessary

Part IV Capital Loss Limitation	
20 Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line 4c, if a trust), the smaller of:	20 ()
a The loss on line 19, column (3) or b \$3,000	

Note: If the loss on line 19, column (3), is more than \$3,000, or if Form 1041, page 1, line 23 (or Form 990-T, line 39), is a loss, complete the Capital Loss Carryover Worksheet in the instructions to figure your capital loss carryover.

Part V Tax Computation Using Maximum Capital Gains Rates

Form 1041 filers Complete this part only if both lines 18a and 19 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), and Form 1041, line 23, is more than zero.

Caution: Skip this part and complete the **Schedule D Tax Worksheet** in the instructions if

- Either line 18b, col (2) or line 18c, col (2) is more than zero, or
- Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero

Form 990-T trusts Complete this part only if both lines 18a and 19 are gains, or qualified dividends are included in income in Part I of Form 990-T, and Form 990-T, line 39, is more than zero. Skip this part and complete the **Schedule D Tax Worksheet** in the instructions if either line 18b, col. (2) or line 18c, col. (2) is more than zero

21 Enter taxable income from Form 1041, line 23 (or Form 990-T, line 39)	21	770,187.	
22 Enter the smaller of line 18a or 19 in column (2) but not less than zero	22	720,435.	
23 Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T)	23		
24 Add lines 22 and 23	24	720,435.	
25 If the estate or trust is filing Form 4952, enter the amount from line 4g; otherwise, enter -0-	25	0.	
26 Subtract line 25 from line 24. If zero or less, enter -0-	26	720,435.	
27 Subtract line 26 from line 21. If zero or less, enter -0-	27	49,752.	
28 Enter the smaller of the amount on line 21 or \$2,650	28	2,650.	
29 Enter the smaller of the amount on line 27 or line 28	29	2,650.	
30 Subtract line 29 from line 28. If zero or less, enter -0-. This amount is taxed at 0%	30		0.
31 Enter the smaller of line 21 or line 26	31	720,435.	
32 Subtract line 30 from line 26	32	720,435.	
33 Enter the smaller of line 21 or \$12,950	33	12,950.	
34 Add lines 27 and 30	34	49,752.	
35 Subtract line 34 from line 33. If zero or less, enter -0-	35	0.	
36 Enter the smaller of line 32 or line 35	36		
37 Multiply line 36 by 15% (0.15)	37		
38 Enter the amount from line 31	38	720,435.	
39 Add lines 30 and 36	39		
40 Subtract line 39 from line 38. If zero or less, enter -0-	40	720,435.	
41 Multiply line 40 by 20% (0.20)	41		144,087.
42 Figure the tax on the amount on line 27. Use the 2019 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)	42	16,766.	
43 Add lines 37, 41, and 42	43	160,853.	
44 Figure the tax on the amount on line 21. Use the 2019 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041)	44	283,327.	
45 Tax on all taxable income Enter the smaller of line 43 or line 44 here and on Form 1041, Schedule G, Part I, line 1a (or Form 990-T, line 41)	45		160,853.

General Business Credit

▶ Go to www.irs.gov/Form3800 for instructions and the latest information.
 ▶ You must attach all pages of Form 3800, pages 1, 2, and 3, to your tax return.

Name(s) shown on return: **THE NEUBAUER FAMILY FOUNDATION** Identifying number: **25-6627704**

Part I Current Year Credit for Credits Not Allowed Against Tentative Minimum Tax (TMT)
 (See instructions and complete Part(s) III before Parts I and II.)

1	General business credit from line 2 of all Parts III with box A checked	1	
2	Passive activity credits from line 2 of all Parts III with box B checked	2	9,439
3	Enter the applicable passive activity credits allowed for 2019. See instructions	3	9,439
4	Carryforward of general business credit to 2019. Enter the amount from line 2 of Part III with box C checked. See instructions for statement to attach	4	0
5	Carryback of general business credit from 2020. Enter the amount from line 2 of Part III with box D checked. See instructions	5	0
6	Add lines 1, 3, 4, and 5	6	9,439

Part II Allowable Credit

7	Regular tax before credits		
	<ul style="list-style-type: none"> • Individuals Enter the sum of the amounts from Form 1040 or 1040-SR, line 12a, and Schedule 2 (Form 1040 or 1040-SR), line 2, or the sum of the amounts from Form 1040-NR, lines 42 and 44 • Corporations Enter the amount from Form 1120, Schedule J, Part I, line 2; or the applicable line of your return • Estates and trusts Enter the sum of the amounts from Form 1041, Schedule G, lines 1a and 1b, or the amount from the applicable line of your return 	7	160,853
8	Alternative minimum tax	8	0
	<ul style="list-style-type: none"> • Individuals. Enter the amount from Form 6251, line 11 • Corporations Enter -0- • Estates and trusts Enter the amount from Schedule I (Form 1041), line 54 	8	0
9	Add lines 7 and 8	9	160,853
10a	Foreign tax credit	10a	
b	Certain allowable credits (see instructions)	10b	
c	Add lines 10a and 10b	10c	0
11	Net income tax. Subtract line 10c from line 9. If zero, skip lines 12 through 15 and enter -0- on line 16	11	160,853
12	Net regular tax. Subtract line 10c from line 7. If zero or less, enter -0-	12	160,853
13	Enter 25% (0.25) of the excess, if any, of line 12 over \$25,000. See instructions	13	
14	Tentative minimum tax:	14	
	<ul style="list-style-type: none"> • Individuals Enter the amount from Form 6251, line 9 • Corporations. Enter -0- • Estates and trusts Enter the amount from Schedule I (Form 1041), line 52 	14	
15	Enter the greater of line 13 or line 14	15	
16	Subtract line 15 from line 11. If zero or less, enter -0-	16	160,853
17	Enter the smaller of line 6 or line 16	17	9,439
	C corporations: See the line 17 instructions if there has been an ownership change, acquisition, or reorganization		

Part II Allowable Credit (continued)

Note: If you are not required to report any amounts on line 22 or 24 below, skip lines 18 through 25 and enter -0- on line 26.

18	Multiply line 14 by 75% (0.75) See instructions	18	
19	Enter the greater of line 13 or line 18	19	
20	Subtract line 19 from line 11. If zero or less, enter -0-	20	160,853
21	Subtract line 17 from line 20. If zero or less, enter -0-	21	151,417
22	Combine the amounts from line 3 of all Parts III with box A, C, or D checked	22	
23	Passive activity credit from line 3 of all Parts III with box B checked	23	0
24	Enter the applicable passive activity credit allowed for 2019. See instructions	24	0
25	Add lines 22 and 24	25	
26	Empowerment zone and renewal community employment credit allowed. Enter the smaller of line 21 or line 25	26	
27	Subtract line 13 from line 11. If zero or less, enter -0-	27	160,853
28	Add lines 17 and 26	28	9,439
29	Subtract line 28 from line 27. If zero or less, enter -0-	29	151,417
30	Enter the general business credit from line 5 of all Parts III with box A checked	30	0
31	Reserved	31	
32	Passive activity credits from line 5 of all Parts III with box B checked	32	9,439
33	Enter the applicable passive activity credits allowed for 2019. See instructions	33	9,439
34	Carryforward of business credit to 2019. Enter the amount from line 5 of Part III with box C checked and line 6 of Part III with box G checked. See instructions for statement to attach	34	0
35	Carryback of business credit from 2020. Enter the amount from line 5 of Part III with box D checked. See instructions	35	0
36	Add lines 30, 33, 34, and 35	36	9,439
37	Enter the smaller of line 29 or line 36	37	9,439
38	Credit allowed for the current year. Add lines 28 and 37. Report the amount from line 38 (if smaller than the sum of Part I, line 6, and Part II, lines 25 and 36, see instructions) as indicated below or on the applicable line of your return • Individuals Schedule 3 (Form 1040 or 1040-SR), line 6, or Form 1040-NR, line 51 • Corporations Form 1120, Schedule J, Part I, line 5c • Estates and trusts Form 1041, Schedule G, line 2b	38	9,439

Name(s) shown on return

Identifying number

THE NEUBAUER FAMILY FOUNDATION

25-6627704

Part III General Business Credits or Eligible Small Business Credits (see instructions)

Complete a separate Part III for each box checked below. See instructions.

- A General Business Credit From a Non-Passive Activity
- B General Business Credit From a Passive Activity
- C General Business Credit Carryforwards
- D General Business Credit Carrybacks
- E Reserved
- F Reserved
- G Eligible Small Business Credit Carryforwards
- H Reserved

I If you are filing more than one Part III with box A or B checked, complete and attach first an additional Part III combining amounts from all Parts III with box A or B checked. Check here if this is the consolidated Part III

(a) Description of credit	(b) If claiming the credit from a pass-through entity, enter the EIN	(c) Enter the appropriate amount
Note: On any line where the credit is from more than one source, a separate Part III is needed for each pass-through entity		
1a Investment (Form 3468, Part II only) (attach Form 3468)	1a	
b Reserved	1b	
c Increasing research activities (Form 6765)	1c	
d Low-income housing (Form 8586, Part I only)	1d	
e Disabled access (Form 8826) (see instructions for limitation)	1e	
f Renewable electricity, refined coal, and Indian coal production (Form 8835)	1f	
g Indian employment (Form 8845)	1g	
h Orphan drug (Form 8820)	1h	
i New markets (Form 8874)	1i	
j Small employer pension plan startup costs (Form 8881) (see instructions for limitation)	1j	
k Employer-provided child care facilities and services (Form 8882) (see instructions for limitation)	1k	
l Biodiesel and renewable diesel fuels (attach Form 8864)	1l	
m Low sulfur diesel fuel production (Form 8896)	1m	
n Distilled spirits (Form 8906)	1n	
o Nonconventional source fuel (carryforward only)	1o	
p Energy efficient home (Form 8908)	1p	
q Energy efficient appliance (carryforward only)	1q	
r Alternative motor vehicle (Form 8910)	1r	
s Alternative fuel vehicle refueling property (Form 8911)	1s	
t Enhanced oil recovery credit (Form 8830)	1t	
u Mine rescue team training (Form 8923)	1u	
v Agricultural chemicals security (carryforward only)	1v	
w Employer differential wage payments (Form 8932)	1w	
x Carbon oxide sequestration (Form 8933)	1x	
y Qualified plug-in electric drive motor vehicle (Form 8936)	1y	
z Qualified plug-in electric vehicle (carryforward only)	1z	
aa Employee retention (Form 5884-A)	1aa	
bb General credits from an electing large partnership (carryforward only)	1bb	
zz Other Oil and gas production from marginal wells (Form 8904) and certain other credits (see instructions)	1zz	
2 Add lines 1a through 1zz and enter here and on the applicable line of Part I	2	0
3 Enter the amount from Form 8844 here and on the applicable line of Part II	3	0
4a Investment (Form 3468, Part III) (attach Form 3468)	4a	
b Work opportunity (Form 5884)	4b	1,253
c Biofuel producer (Form 6478)	4c	
d Low-income housing (Form 8586, Part II)	4d	
e Renewable electricity, refined coal, and Indian coal production (Form 8835)	4e	
f Employer social security and Medicare taxes paid on certain employee tips (Form 8846)	4f	6,372
g Qualified railroad track maintenance (Form 8900)	4g	
h Small employer health insurance premiums (Form 8941)	4h	
i Increasing research activities (Form 6765)	4i	1,811
j Employer credit for paid family and medical leave (Form 8994)	4j	
z Other	4z	
5 Add lines 4a through 4z and enter here and on the applicable line of Part II	5	9,436
6 Add lines 2, 3, and 5 and enter here and on the applicable line of Part II	6	9,436