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EXTENDED TO NOVEMBER 16, 2020
Return of Private Foundation
or Section 4947(a)(1) Trust Treated as Private Foundation

Form **990-PF**
Department of the Treasury
Internal Revenue Service

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

OMB No 1545-0047
2019
Open to Public Inspection

1912

For calendar year 2019 or tax year beginning , and ending

Name of foundation
OSTEOPATHIC HERITAGE FOUNDATION

Number and street (or P O box number if mail is not delivered to street address) Room/suite
1500 LAKESHORE DRIVE NO 230

City or town, state or province, country, and ZIP or foreign postal code
COLUMBUS, OH 43204

A Employer identification number
31-6056252

B Telephone number
614-737-4370

C If exemption application is pending, check here

D 1. Foreign organizations, check here
2. Foreign organizations meeting the 85% test, check here and attach computation

E If private foundation status was terminated under section 507(b)(1)(A), check here

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here

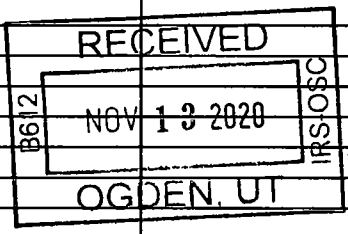
G Check all that apply
 Initial return Initial return of a former public charity
 Final return Amended return
 Address change Name change

H Check type of organization. Section 501(c)(3) exempt private foundation
 Section 4947(a)(1) nonexempt charitable trust Other taxable private foundation **04**

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) **\$ 270,398,738.**
J Accounting method: Cash Accrual
 Other (specify) _____

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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).)		(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	1,000.		N/A	
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	7,537,016.	7,537,016.		STATEMENT 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	16,812,323.			
	b Gross sales price for all assets on line 6a 326,746,661.				
	7 Capital gain net income (from Part IV, line 2)		16,812,323.		
	8 Net short-term capital gain 8A				
	9 Income modifications				
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income	129,458.	1,376.		STATEMENT 2	
12 Total. Add lines 1 through 11	24,479,797.	24,350,715.			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	286,113.	7,153.		278,960.
	14 Other employee salaries and wages	560,157.	5,842.		554,315.
	15 Pension plans, employee benefits	1,084,759.	3,165.		1,081,594.
	16a Legal fees STMT 3	73,184.	0.		73,184.
	b Accounting fees STMT 4	176,900.	88,450.		88,450.
	c Other professional fees STMT 5	1,200,832.	1,104,752.		96,080.
	17 Interest				
	18 Taxes STMT 6	558,253.	772.		52,481.
	19 Depreciation and depletion	3,835.	0.		
	20 Occupancy	59,232.	912.		58,319.
	21 Travel, conferences, and meetings	43,033.	0.		43,033.
	22 Printing and publications	1,251.	0.		1,251.
	23 Other expenses STMT 7	204,727.	18,241.		186,486.
	24 Total operating and administrative expenses Add lines 13 through 23	4,252,276.	1,229,287.		2,514,153.
	25 Contributions, gifts, grants paid	11,595,613.			11,595,613.
26 Total expenses and disbursements. Add lines 24 and 25	15,847,889.	1,229,287.		14,109,766.	
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements	8,631,908.				
b Net investment income (if negative, enter -0-)		23,121,428.			
c Adjusted net income (if negative, enter -0-)			N/A		



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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year		End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value	(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing		571,449.	216,990.	216,990.	
	2	Savings and temporary cash investments		15,323,304.	3,738,020.	3,738,020.	
	3	Accounts receivable	192,768.				
		Less: allowance for doubtful accounts		496,338.	192,768.	192,768.	
	4	Pledges receivable					
		Less: allowance for doubtful accounts					
	5	Grants receivable					
	6	Receivables due from officers, directors, trustees, and other disqualified persons					
	7	Other notes and loans receivable					
		Less: allowance for doubtful accounts					
	8	Inventories for sale or use					
	9	Prepaid expenses and deferred charges		52,714.	53,807.	53,807.	
	10a	Investments - U.S. and state government obligations		24,502,636.	0.	0.	
	b	Investments - corporate stock	STMT 9	143,682,397.	82,893,862.	82,893,862.	
	c	Investments - corporate bonds	STMT 10	16,132,924.	76,900,090.	76,900,090.	
	11	Investments - land, buildings, and equipment basis					
	Less: accumulated depreciation						
12	Investments - mortgage loans						
13	Investments - other	STMT 11	39,252,000.	106,386,109.	106,386,109.		
14	Land, buildings, and equipment: basis	139,309.					
	Less: accumulated depreciation	STMT 12	122,551.	4,011.	16,758.	16,758.	
15	Other assets (describe DEPOSITS)		334.	334.	334.		
16	Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		240,018,107.	270,398,738.	270,398,738.		
Liabilities	17	Accounts payable and accrued expenses		459,318.	453,739.		
	18	Grants payable					
	19	Deferred revenue					
	20	Loans from officers, directors, trustees, and other disqualified persons					
	21	Mortgages and other notes payable					
	22	Other liabilities (describe PENSION OBLIGATION)		1,498,841.	1,875,290.		
23	Total liabilities (add lines 17 through 22)		1,958,159.	2,329,029.			
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		0.	0.		
	27	Paid-in or capital surplus, or land, bldg., and equipment fund		0.	0.		
	28	Retained earnings, accumulated income, endowment, or other funds		238,059,948.	268,069,709.		
29	Total net assets or fund balances		238,059,948.	268,069,709.			
30	Total liabilities and net assets/fund balances		240,018,107.	270,398,738.			

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	238,059,948.
2	Enter amount from Part I, line 27a	2	8,631,908.
3	Other increases not included in line 2 (itemize) SEE STATEMENT 8	3	21,377,853.
4	Add lines 1, 2, and 3	4	268,069,709.
5	Decreases not included in line 2 (itemize)	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29	6	268,069,709.

Part IV Capital Gains and Losses for Tax on Investment Income SEE ATTACHED STATEMENTS

(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				
b				
c				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) ((e) plus (f) minus (g))	
a				
b				
c				
d				
e	326,746,661.	309,934,338.	16,812,323.	
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))	
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any		
a				
b				
c				
d				
e			16,812,323.	
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	16,812,323.
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). If (loss), enter -0- in Part I, line 8	{		3	N/A

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? Yes No
 If "Yes," the foundation doesn't qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year; see the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2018	14,409,689.	266,642,148.	.054041
2017	10,478,079.	259,204,962.	.040424
2016	12,998,669.	239,658,108.	.054238
2015	10,500,148.	245,994,479.	.042684
2014	15,619,524.	255,196,964.	.061206
2 Total of line 1, column (d)			2 .252593
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years			3 .050519
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5			4 257,675,090.
5 Multiply line 4 by line 3			5 13,017,488.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 231,214.
7 Add lines 5 and 6			7 13,248,702.
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions.			8 14,109,766.

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

Table with 11 rows for excise tax calculations. Includes sub-table for Credits/Payments (6a-6d) and a final total of 279,376.00.

Part VII-A Statements Regarding Activities

Table with 10 rows for activity statements. Includes questions about political campaigns, tax on political expenditures, and substantial contributors. Includes handwritten 'N/A' and 'OH'.

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 ► <u>WWW.OSTEOPATHICHERITAGE.ORG</u>	X	
14 The books are in care of ► <u>TERRI DONLIN HUESMAN</u> Telephone no. ► <u>614-737-4370</u> Located at ► <u>1500 LAKESHORE DRIVE NO 230, COLUMBUS, OH</u> ZIP+4 ► <u>43204</u>		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year	N/A	
16 At any time during calendar year 2019, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►	16	X

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

	Yes	No
1a During the year, did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions Organizations relying on a current notice regarding disaster assistance, check here	N/A	
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 2019?		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 2019, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2019? If "Yes," list the years ► _____, _____, _____	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)	N/A	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► _____, _____, _____, _____		
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 2019 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 2019)	N/A	
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 2019?		X

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

		Yes	No
5a During the year, did the foundation pay or incur any amount to:			
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<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	N/A	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?	N/A		
If "Yes," attach the statement required by Regulations section 53.4945-5(d).	<input type="checkbox"/> Yes <input type="checkbox"/> No		
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?	N/A	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.

(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
SEE STATEMENT 13		284,568.	62,222.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). 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
SUSAN BEAUDRY - 1500 LAKE SHORE DRIVE, COLUMBUS, OH 43204	DIRECTOR OF PROGRAMS 37.50	185,061.	38,492.	0.
JEFFREY FORTKAMP - 1500 LAKE SHORE DRIVE, COLUMBUS, OH 43204	OPERATIONS OFFICER 37.50	100,827.	24,861.	0.
ERIN PRESCOTT - 1500 LAKE SHORE DRIVE, COLUMBUS, OH 43204	PROGRAM ADMINISTRATOR 37.50	82,968.	22,208.	0.
BEVERLY L. RINEHART - 1500 LAKE SHORE DRIVE, COLUMBUS, OH 43204	ADMIN. ASSISTANT 37.50	85,624.	10,151.	0.
RENEE GIFFORD - 1500 LAKE SHORE DRIVE, COLUMBUS, OH 43204	ADMIN. ASSISTANT 37.50	63,664.	16,133.	0.
Total number of other employees paid over \$50,000				7

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)*

3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
LONDON CO. - 1800 BAYBERRY COURT, STE 301, RICHMOND, VA 23226	INVESTMENT MANAGEMENT FEES	415,798.
HIGHLAND CONSULTING ASSOCIATES 159 CROCKER PARK BLVD., CLEVELAND, OH 44145	INVESTMENT MANAGEMENT FEES	268,257.
BARROW HANLEY - 2200 ROSS AVENUE, 31TH FLOOR, DALLAS, TX 75201	INVESTMENT MANAGEMENT FEES	240,530.
JOHN GERLACH & COMPANY LLP 37 W. BROAD ST. STE 800, COLUMBUS, OH 43215	ACCOUNTING	161,400.
BRANDYWINE - 2929 ARCH STREET, 8TH FLOOR, PHILADELPHIA, PA 19104	INVESTMENT MANAGEMENT FEES	96,153.
Total number of others receiving over \$50,000 for professional services		6

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
2	
All other program-related investments. See instructions	
3	
Total. Add lines 1 through 3	0.

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	253,718,210.
b	Average of monthly cash balances	1b	7,880,866.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	261,599,076.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	261,599,076.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	3,923,986.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	257,675,090.
6	Minimum investment return. Enter 5% of line 5	6	12,883,755.

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	12,883,755.
2a	Tax on investment income for 2019 from Part VI, line 5	2a	231,214.
b	Income tax for 2019 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	231,214.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	12,652,541.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	12,652,541.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	12,652,541.

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	14,109,766.
b	Program-related investments - total from Part IX-B	1b	0.
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	14,109,766.
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	5	231,214.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	13,878,552.

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 2018	(c) 2018	(d) 2019
1 Distributable amount for 2019 from Part XI, line 7				12,652,541.
2 Undistributed income, if any, as of the end of 2019				
a Enter amount for 2018 only			0.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2019:				
a From 2014				
b From 2015				
c From 2016	300,737.			
d From 2017				
e From 2018	1,452,006.			
f Total of lines 3a through e	1,752,743.			
4 Qualifying distributions for 2019 from Part XII, line 4: ▶ \$ 14,109,766.				
a Applied to 2018, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2019 distributable amount				12,652,541.
e Remaining amount distributed out of corpus	1,457,225.			
5 Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:	3,209,968.			
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
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		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2018. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2019. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020				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)	0.			
8 Excess distributions carryover from 2014 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a	3,209,968.			
10 Analysis of line 9:				
a Excess from 2015				
b Excess from 2016	300,737.			
c Excess from 2017				
d Excess from 2018	1,452,006.			
e Excess from 2019	1,457,225.			

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

- 1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2019, 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) 2019	(b) 2018	(c) 2017	(d) 2016	
2 a 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).)

NONE

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

NONE

- 2 **Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**
- Check here if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc., to individuals or organizations under other conditions, complete items 2a, b, c, and d.

- a The name, address, and telephone number or email address of the person to whom applications should be addressed
-
- 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				
AMERICAN OSTEOPATHIC FOUNDATION 142 E. ONTARIO STREET CHICAGO, IL 60611	NONE	PC	TO RECOGNIZE OSTEOPATHIC LEADERS WHO HAVE MADE AN OUTSTANDING CONTRIBUTION TO THE	6,750.
CENTRAL OHIO HOSPITAL COUNCIL 155 E. BROAD ST., 23RD FLOOR COLUMBUS, OH 43215-3609	NONE	PC	TO IMPROVE THE PSYCHIATRIC CRISIS SERVICES SYSTEM IN FRANKLIN COUNTY.	20,000.
COLUMBUS METROPOLITAN CLUB 100 EAST BROAD STREET COLUMBUS, OH 43205	NONE	PC	TO SPONSOR ONE IN A SERIES OF FORUM DISCUSSIONS THAT WILL FOCUS ON HEALTHCARE ISSUES CRITICAL TO THE	3,500.
FINANCE FUND CAPITAL CORPORATION (HOPEWELL HEALTH CENTERS) 175 S. HIGH ST., STE. 1200 COLUMBUS, OH 43215	NONE	PC	TO PROVIDE FUNDING IN PARTNERSHIP WITH THE OSTEOPATHIC HERITAGE FOUNDATION OF NELSONVILLE FOR A	223,650.
HEALTHSOURCE OF OHIO FOUNDATION 5400 DUPONT CIRCLE MILFORD, OH 45150	NONE	PC	TO PROVIDE A TRIBUTE TO THE HEALTHSOURCE OF OHIO FOUNDATION IN HONOR OF THE ECKERT MENTOR OF THE YEAR	500.
Total	SEE CONTINUATION SHEET(S)			11,595,613.
b Approved for future payment				
NONE				
Total				0.

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1 Program service revenue:					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	7,537,016.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income			14	1,376.	
8 Gain or (loss) from sales of assets other than inventory			18	16,812,323.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue					
a REIMBURSEMENT			01	128,082.	
b _____					
c _____					
d _____					
e _____					
12 Subtotal Add columns (b), (d), and (e)		0.		24,478,797.	0.
13 Total. Add line 12, columns (b), (d), and (e)					13 24,478,797.

(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).

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
		N/A	

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
N/A		

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.

Sign Here	<i>Jon Yerian</i>	11/12/20	PRESIDENT	May the IRS discuss this return with the preparer shown below? See instr. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
	Signature of officer or trustee	Date	Title		
Paid Preparer Use Only	Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
	JON YERIAN, CPA	JON YERIAN, CPA	11/12/20		P00575540
	Firm's name	▶ JOHN GERLACH & COMPANY LLP		Firm's EIN	▶ 31-4419361
	Firm's address	▶ 37 W BROAD ST STE 800 COLUMBUS, OH 43215		Phone no.	614-224-2164

OSTEOPATHIC HERITAGE FOUNDATION

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., 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 PNC INSTL ASST MGMT - CUSTODY STMT - SEE ATTACHED	P		
b PNC INSTL ASST MGMT - CUSTODY STMT - SEE ATTACHED	P		
c PNC INSTL ASST MGMT - BHMS DIV SMALL VALUE - SEE	P		
d PNC INSTL ASST MGMT - BHMS DIV FOCUS LG VAL - SEE	P		
e PNC INSTL ASST MGMT - GRANITE SMALL GROWTH - SEE	P		
f PNC INSTL ASST MGMT - CUSTODY STMT - SEE ATTACHED	P		
g PNC INSTL ASST MGMT - LONDON CO LARGE VALUE CUSTO	P		
h PNC INSTL ASST MGMT - LONDON CO SMALL VALUE CUSTO	P		
i ACADIAN GLOBAL MANAGED VOLATILITY EQUITY FUND PAS	P		
j ACADIAN GLOBAL MANAGED VOLATILITY EQUITY FUND PAS	P		
k DIVERSIFIED SMALL CAP VALUE FUND K-1 PASS-THROUGH	P		
l DIVERSIFIED SMALL CAP VALUE FUND K-1 PASS-THROUGH	P		
m DIVERSIFIED SMALL CAP SALE	P		
n PNC INST ASST MGMT - BASIS ADJUSTMENT ON STOCKS S	P		
o PNC INSTL ASST MGMT - BRANDYWINE DYNAMIC LV	P		

(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 91,012,615.		89,318,190.	1,694,425.
b 23,608,156.		23,612,955.	-4,799.
c 23,957,530.		23,328,405.	629,125.
d 41,491,838.		38,860,272.	2,631,566.
e 613,673.		610,108.	3,565.
f 51,564,542.		51,149,638.	414,904.
g 18,396,538.		12,897,860.	5,498,678.
h 18,154,952.		14,522,785.	3,632,167.
i		26,635.	-26,635.
j		66,983.	-66,983.
k 1,466,718.			1,466,718.
l		1,652,395.	-1,652,395.
m 19,132,676.		19,020,259.	112,417.
n		262,134.	-262,134.
o 36,101,059.		34,605,719.	1,495,340.

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			1,694,425.
b			-4,799.
c			629,125.
d			2,631,566.
e			3,565.
f			414,904.
g			5,498,678.
h			3,632,167.
i			-26,635.
j			-66,983.
k			1,466,718.
l			-1,652,395.
m			112,417.
n			-262,134.
o			1,495,340.

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	
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). If (loss), enter "-0-" in Part I, line 8 }	3	

OSTEOPATHIC HERITAGE FOUNDATION

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., 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 CAPITAL GAINS DIVIDENDS			
b			
c			
d			
e			
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 1,246,364.			1,246,364.
b			
c			
d			
e			
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			1,246,364.
b			
c			
d			
e			
f			
g			
h			
i			
j			
k			
l			
m			
n			
o			

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	16,812,323.
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). If (loss), enter "-0-" in Part I, line 8 }	3	N/A

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
MARYHAVEN 1791 ALUM CREEK DRIVE COLUMBUS, OH 43207	NONE	PC	TO SUPPORT MARYHAVEN'S ANNUAL FUNDRAISING EVENT AND TO PROVIDE A HOLIDAY DONATION IN 2019 ON BEHALF OF OHF	10,200.
NATIONAL BOARD OF OSTEOPATHIC MEDICAL EXAMINERS INC. 101 W. ELM ST., STE. 230 CONCHOHOCKEN, PA 19428	NONE	PC	TO CONVENE LEADERS FROM THE SELF-REGULATION AUTHORITIES OF THE OSTEOPATHIC MEDICAL	40,000.
OHIO UNIVERSITY FOUNDATION MCGUFFEY HALL, 1 OHIO UNIVERISTY DRIVE ATHENS, OH 45701	NONE	PC	TO PROVIDE SUPPORT TOWARD HERITAGE COLLEGE STUDENT SCHOLARSHIPS.	3,200.
OHIO UNIVERSITY 108 CUTLER HALL ATHENS, OH 45701	NONE	GOV	TO SUPPORT PROJECTS AND PROGRAMS DETERMINED TO BE OF SIGNIFICANT VALUE TO THE COMMUNITY-AT-LARGE	9,950,000.
OHIOHEALTH DOCTORS HOSPITAL 3430 OHIOHEALTH PARKWAY COLUMBUS, OH 43202	NONE	PC	TO PROVIDE TRANSITIONAL SUPPORT TO AFFECT A SEAMLESS TRANSITION TO THE ACCREDITATION COUNCIL	553,528.
OHIOHEALTH DOCTORS HOSPITAL 3430 OHIOHEALTH PARKWAY COLUMBUS, OH 43202	NONE	PC	TO PROVIDE SUPPORT TO AFFECT A SEAMLESS TRANSITION OF THE OSTEOPATHIC MEDICAL EDUCATION PROGRAMS AT	733,235.
OHIOHEALTH DOCTORS HOSPITAL 5100 W. BROAD ST. COLUMBUS, OH 43228	NONE	PC	TO PROVIDE A TRIBUTE TO THE DOCTORS HOSPITAL INTERNAL MEDICINE PROGRAM IN HONOR OF THE ECKERT	500.
OHIOHEALTH FOUNDATION 3430 OHIOHEALTH PARKWAY COLUMBUS, OH 43202	NONE	PC	TO PROVIDE A MEMORIAL TRIBUTE IN HONOR OF GLORIA JEFFERSON, MOTHER OF KAREN MORRISON, TO SUPPORT	2,600.
OTTERBEIN UNIVERSITY 1 S. GROVE ST. WESTERVILLE, OH 43081	NONE	PC	TO HOST SCHOLARS, DIGNITARIES, BUSINESS VISIONARIES AND OTHER EXEMPLARS OF INNOVATION, LEADERSHIP	15,000.
PEAK GRANTMAKING 1666 K STREET NW, STE. 440 WASHINGTON, DC 20006	NONE	PC	TO SUPPORT A REGIONAL MEETING OF GRANTS MANAGERS IN COLUMBUS.	800.
Total from continuation sheets				11,341,213.

OSTEOPATHIC HERITAGE FOUNDATION

31-6056252

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)				
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
RONALD MCDONALD HOUSE CHARITIES OF CENTRAL OHIO 711 E. LIVINGSTON AVE. COLUMBUS, OH 43205-2640	NONE	PC	TO PROVIDE A CONTRIBUTION IN HONOR OF RONALD MCDONALD HOUSE VOLUNTEERS BEFORE A DAY OF	500.
ST. VINCENT FAMILY CENTER 1490 E. MAIN ST. COLUMBUS, OH 43205	NONE	PC	TO PROVIDE SPONSORSHIP OF THE CORCORAN AWARDS LUNCHEON.	1,650.
THE COLUMBUS FOUNDATION 1234 E. BROAD ST. COLUMBUS, OH 43205	NONE	PC	TO SUPPORT DISSEMINATION AND REACH OF THE PUBLIC AWARENESS CAMPAIGN OF THE OHIO OPIOID	25,000.
UNITED WAY OF CENTRAL OHIO 360 S. THIRD ST. COLUMBUS, OH 43215	NONE	PC	TO SUPPORT NONPROFIT CAPACITY BUILDING.	5,000.
Total from continuation sheets				

Part XV Supplementary Information

3a Grants and Contributions Paid During the Year Continuation of Purpose of Grant or Contribution

NAME OF RECIPIENT - AMERICAN OSTEOPATHIC FOUNDATION

TO RECOGNIZE OSTEOPATHIC LEADERS WHO HAVE MADE AN OUTSTANDING CONTRIBUTION TO THE PROFESSION, DR. KAREN J. NICHOLS AND TO SUPPORT THE AMERICAN OSTEOPATHIC FOUNDATION HONORS CELEBRATION.

NAME OF RECIPIENT - COLUMBUS METROPOLITAN CLUB

TO SPONSOR ONE IN A SERIES OF FORUM DISCUSSIONS THAT WILL FOCUS ON HEALTHCARE ISSUES CRITICAL TO THE CENTRAL OHIO COMMUNITY.

NAME OF RECIPIENT - FINANCE FUND CAPITAL CORPORATION (HOPEWELL HEALTH CENTERS)

TO PROVIDE FUNDING IN PARTNERSHIP WITH THE OSTEOPATHIC HERITAGE FOUNDATION OF NELSONVILLE FOR A DENTAL SAFETY NET CLINIC IN NELSONVILLE, OHIO.

NAME OF RECIPIENT - HEALTHSOURCE OF OHIO FOUNDATION

TO PROVIDE A TRIBUTE TO THE HEALTHSOURCE OF OHIO FOUNDATION IN HONOR OF THE ECKERT MENTOR OF THE YEAR AWARD RECIPIENT, DR. MICHAEL DIETZ.

NAME OF RECIPIENT - MARYHAVEN

TO SUPPORT MARYHAVEN'S ANNUAL FUNDRAISING EVENT AND TO PROVIDE A HOLIDAY DONATION IN 2019 ON BEHALF OF OHF BOARD AND STAFF IN SUPPORT OF THE ADOLESCENT RESIDENTIAL TREATMENT PROGRAM.

NAME OF RECIPIENT - NATIONAL BOARD OF OSTEOPATHIC MEDICAL EXAMINERS INC.

TO CONVENE LEADERS FROM THE SELF-REGULATION AUTHORITIES OF THE OSTEOPATHIC MEDICAL PROFESSION IN THE UNITED STATES.

Part XV Supplementary Information

3a Grants and Contributions Paid During the Year Continuation of Purpose of Grant or Contribution

NAME OF RECIPIENT - OHIO UNIVERSITY

TO SUPPORT PROJECTS AND PROGRAMS DETERMINED TO BE OF SIGNIFICANT VALUE
 TO THE COMMUNITY-AT-LARGE AND OF THE HIGHEST PRIORITY TO THE FOUNDATION
 TO HELP ADVANCE THE HERITAGE COLLEGE TO NATIONAL PROMINENCE IN THE
 TRAINING OF PRIMARY CARE PHYSICIANS, FOCUSED RESEARCH AND SERVICE TO
 OHIO CITIZENS, ESPECIALLY THOSE WITHIN CENTRAL AND SOUTHEAST OHIO.

NAME OF RECIPIENT - OHIOHEALTH DOCTORS HOSPITAL

TO PROVIDE TRANSITIONAL SUPPORT TO AFFECT A SEAMLESS TRANSITION TO THE
 ACCREDITATION COUNCIL FOR GRADUATE MEDICAL EDUCATION SINGLE
 ACCREDITATION SYSTEM.

NAME OF RECIPIENT - OHIOHEALTH DOCTORS HOSPITAL

TO PROVIDE SUPPORT TO AFFECT A SEAMLESS TRANSITION OF THE OSTEOPATHIC
 MEDICAL EDUCATION PROGRAMS AT OHIOHEALTH DOCTORS HOSPITAL TO THE
 ACCREDITATION COUNCIL FOR GRADUATE MEDICAL EDUCATION SINGLE
 ACCREDITATION SYSTEM.

NAME OF RECIPIENT - OHIOHEALTH DOCTORS HOSPITAL

TO PROVIDE A TRIBUTE TO THE DOCTORS HOSPITAL INTERNAL MEDICINE PROGRAM
 IN HONOR OF THE ECKERT MENTOR OF THE YEAR AWARD RECIPIENT, DR. ROBERT
 PALMA.

NAME OF RECIPIENT - OHIOHEALTH FOUNDATION

TO PROVIDE A MEMORIAL TRIBUTE IN HONOR OF GLORIA JEFFERSON, MOTHER OF
 KAREN MORRISON, TO SUPPORT THE NEUROSCIENCES SERVICES AND TO PROVIDE A
 DONATION IN HONOR OF DAVID P. BLOM, RETIRED CEO AND PRESIDENT OF
 OHIOHEALTH.

Part XV Supplementary Information

3a Grants and Contributions Paid During the Year Continuation of Purpose of Grant or Contribution

NAME OF RECIPIENT - OTTERBEIN UNIVERSITY

TO HOST SCHOLARS, DIGNITARIES, BUSINESS VISIONARIES AND OTHER EXEMPLARS OF INNOVATION, LEADERSHIP AND COLLABORATION.

NAME OF RECIPIENT - RONALD MCDONALD HOUSE CHARITIES OF CENTRAL OHIO

TO PROVIDE A CONTRIBUTION IN HONOR OF RONALD MCDONALD HOUSE VOLUNTEERS BEFORE A DAY OF SERVICE WITH FOUNDATION STAFF.

NAME OF RECIPIENT - THE COLUMBUS FOUNDATION

TO SUPPORT DISSEMINATION AND REACH OF THE PUBLIC AWARENESS CAMPAIGN OF THE OHIO OPIOID EDUCATION ALLIANCE.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
DIVIDEND INCOME	8,225,387.	1,246,364.	6,979,023.	6,979,023.	
INTEREST INCOME	351,974.	0.	351,974.	351,974.	
K-1 ACADIAN GLOBA;	46,581.	0.	46,581.	46,581.	
K-1 DIVERSIFIED SMALL CAP VALUE FUND - BRANDYWINE INVESTMENT TRUST	159,438.	0.	159,438.	159,438.	
TO PART I, LINE 4	8,783,380.	1,246,364.	7,537,016.	7,537,016.	

FORM 990-PF OTHER INCOME STATEMENT 2

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
OTHER K-1 INCOME	1,376.	1,376.	
REIMBURSEMENT	128,082.	0.	
TOTAL TO FORM 990-PF, PART I, LINE 11	129,458.	1,376.	

FORM 990-PF LEGAL FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL	73,184.	0.		73,184.
TO FM 990-PF, PG 1, LN 16A	73,184.	0.		73,184.

FORM 990-PF		ACCOUNTING FEES		STATEMENT 4	
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
ACCOUNTING	176,900.	88,450.		88,450.	
TO FORM 990-PF, PG 1, LN 16B	176,900.	88,450.		88,450.	

FORM 990-PF		OTHER PROFESSIONAL FEES		STATEMENT 5	
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
PENSION FEES	3,060.	0.		3,060.	
CONSULTING	93,020.	0.		93,020.	
INVESTMENT MANAGEMENT FEES	1,104,752.	1,104,752.		0.	
TO FORM 990-PF, PG 1, LN 16C	1,200,832.	1,104,752.		96,080.	

FORM 990-PF		TAXES		STATEMENT 6	
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FEDERAL EXCISE TAX	505,000.	0.		0.	
PAYROLL TAXES	53,253.	772.		52,481.	
TO FORM 990-PF, PG 1, LN 18	558,253.	772.		52,481.	

FORM 990-PF	OTHER EXPENSES			STATEMENT 7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MARKETING	24,533.	0.		24,533.
POSTAGE AND SHIPPING	921.	0.		921.
INSURANCE	25,271.	0.		25,271.
INTERNET ACCESS FEES	816.	0.		816.
SOFTWARE MAINTENANCE	46,010.	1,500.		44,510.
EQUIPMENT RENTAL	11,917.	0.		11,917.
RECORDS STORAGE	4,168.	1,042.		3,126.
OFFICE	27,658.	0.		27,658.
PAYROLL PROCESSING	9,541.	147.		9,394.
DUES & SUBSCRIPTIONS	3,602.	0.		3,602.
STAFF TRAINING	6,535.	0.		6,535.
MISC	13,890.	2,288.		11,602.
K-1 PORTFOLIO DEDUCTION - ACADIAN GLOBAL	4,615.	4,615.		0.
PHOTOGRAPHY	1,475.	0.		1,475.
EQUIPMENT MAINTENANCE	15,126.	0.		15,126.
K-1 PORTFOLIO DEDUCTION - BRANDYWINE	8,649.	8,649.		0.
TO FORM 990-PF, PG 1, LN 23	204,727.	18,241.		186,486.

FORM 990-PF	OTHER INCREASES IN NET ASSETS OR FUND BALANCES	STATEMENT 8
DESCRIPTION		AMOUNT
UNREALIZED GAIN ON INVESTMENTS		5,707,506.
K-1 BOOK/TAX DIFFERENCE		85,164.
BOOK/TAX DIFFERENCE ON PASS-THROUGH DISPOSAL		15,585,183.
TOTAL TO FORM 990-PF, PART III, LINE 3		21,377,853.

FORM 990-PF	CORPORATE STOCK		STATEMENT 9
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE	
COMMON STOCK	82,893,862.	82,893,862.	
TOTAL TO FORM 990-PF, PART II, LINE 10B	82,893,862.	82,893,862.	

FORM 990-PF CORPORATE BONDS STATEMENT 10

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
BOND FUNDS	76,900,090.	76,900,090.
TOTAL TO FORM 990-PF, PART II, LINE 10C	76,900,090.	76,900,090.

FORM 990-PF OTHER INVESTMENTS STATEMENT 11

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
MUTUAL FUNDS/REITS	FMV	106,386,109.	106,386,109.
TOTAL TO FORM 990-PF, PART II, LINE 13		106,386,109.	106,386,109.

FORM 990-PF DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT STATEMENT 12

DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
PROPERTY AND EQUIPMENT	139,309.	122,551.	16,758.
TOTAL TO FM 990-PF, PART II, LN 14	139,309.	122,551.	16,758.

FORM 990-PF

PART VIII - LIST OF OFFICERS, DIRECTORS
TRUSTEES AND FOUNDATION MANAGERS

STATEMENT 13

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
ROBERT A. PALMA, D.O. 1500 LAKE SHORE DRIVE COLUMBUS, OH 43204	BOARD CHAIRMAN 1.00	0.	0.	0.
MS. JANE W. CUNNINGHAM 1500 LAKE SHORE DRIVE COLUMBUS, OH 43204	VICE CHAIR 1.00	0.	0.	0.
GEORGE O. FAERBER, D.O. 1500 LAKE SHORE DRIVE COLUMBUS, OH 43204	SECRETARY/TREASURER 1.00	0.	0.	0.
TOM ANDERSON, D.O. 1500 LAKE SHORE DRIVE COLUMBUS, OH 43204	DIRECTOR 1.00	0.	0.	0.
TOM BAKER, D.O. 1500 LAKE SHORE DRIVE COLUMBUS, OH 43204	DIRECTOR 1.00	0.	0.	0.
REBECCA DEVILLERS, DO 1500 LAKE SHORE DRIVE COLUMBUS, OH 43204	DIRECTOR 1.00	0.	0.	0.
JEFFREY HUTCHISON, D.O. 1500 LAKE SHORE DRIVE COLUMBUS, OH 43204	DIRECTOR 1.00	0.	0.	0.
PETER E. JOHNSTON, D.O. 1500 LAKE SHORE DRIVE COLUMBUS, OH 43204	DIRECTOR 1.00	0.	0.	0.
MR. RON LINVILLE 1500 LAKE SHORE DRIVE COLUMBUS, OH 43204	DIRECTOR 1.00	0.	0.	0.
MR. FREDERICK L. OREMUS, ESQ. 1500 LAKE SHORE DRIVE COLUMBUS, OH 43204	DIRECTOR 1.00	0.	0.	0.

OSTEOPATHIC HERITAGE FOUNDATION

31-6056252

MR. ROBERT OVERS 1500 LAKE SHORE DRIVE COLUMBUS, OH 43204	DIRECTOR 1.00	0.	0.	0.
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MR. RICHARD A. VINCENT 1500 LAKE SHORE DRIVE COLUMBUS, OH 43204	DIRECTOR 1.00	0.	0.	0.
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MR. STEVEN E. COX 1500 LAKE SHORE DRIVE COLUMBUS, OH 43204	DIRECTOR 1.00	0.	0.	0.
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MS. TERRI DONLIN HUESMAN 1500 LAKE SHORE DRIVE COLUMBUS, OH 43204	PRESIDENT/CEO 40.00	284,568.	62,222.	0.
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TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		<u>284,568.</u>	<u>62,222.</u>	<u>0.</u>
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2019 DEPRECIATION AND AMORTIZATION REPORT

FORM 990-PF PAGE 1

990-PF

Asset No	Description	Date Acquired	Method	Life	C o n v	Line No	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
1	PROPERTY AND EQUIPMENT		SL	5.00		16	139,309.				139,309.	118,716.		3,835.	122,551.
	* TOTAL 990-PF PG 1 DEPR						139,309.				139,309.	118,716.		3,835.	122,551.

928111 04-01-19

(D) - Asset disposed

* ITC, Salvage, Bonus, Commercial Revitalization Deduction, GO Zone