

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

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

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

OMB No. 1545-0052
2020
Open to Public Inspection

For calendar year 2020, or tax year beginning 01-01-2020 , and ending 12-31-2020

Name of foundation AGUSTIN A RAMIREZ JR FAMILY FOUNDATION		A Employer identification number 39-6626017	
Number and street (or P.O. box number if mail is not delivered to street address) Room/suite 411 EAST WISCONSIN AVENUE 2400		B Telephone number (see instructions) (414) 277-5000	
City or town, state or province, country, and ZIP or foreign postal code MILWAUKEE, WI 53202		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input checked="" type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here..... <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation ... <input type="checkbox"/>	
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ <u>33,629,850</u>		J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)	
		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	

Part I Analysis of Revenue and Expenses <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)</i>		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)	10,729,517			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	173,906	173,906		
	4 Dividends and interest from securities	171,720	171,720		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	36,799			
	b Gross sales price for all assets on line 6a <u>10,486,105</u>				
	7 Capital gain net income (from Part IV, line 2)		36,799		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less: Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule)	106				
12 Total. Add lines 1 through 11	11,112,048	382,425			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	45,384	4,538		40,846
	b Accounting fees (attach schedule)				
	c Other professional fees (attach schedule)	27,424	12,749		14,675
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	15,205	205		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	4,305	31		4,274
	24 Total operating and administrative expenses. Add lines 13 through 23	92,318	17,523		59,795
	25 Contributions, gifts, grants paid	1,863,500			1,863,500
26 Total expenses and disbursements. Add lines 24 and 25	1,955,818	17,523		1,923,295	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	9,156,230				
b Net investment income (if negative, enter -0-)		364,902			
c Adjusted net income (if negative, enter -0-)					

Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing	234,234	118,500	118,500
	2 Savings and temporary cash investments	377,029	333,118	333,118
	3 Accounts receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	4 Pledges receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ _____ 17,367,500 Less: allowance for doubtful accounts ▶ _____	17,367,500	17,367,500	17,367,500
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments—U.S. and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)	2,205,023	2,081,751	2,590,538
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	10,371,409	12,651,424	13,220,194
	14 Land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
15 Other assets (describe ▶ _____)				
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	30,555,195	32,552,293	33,629,850	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule).	7,159,132		
	22 Other liabilities (describe ▶ _____)			
	23 Total liabilities (add lines 17 through 22)	7,159,132	0	
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	23,396,063	32,552,293	
	27 Paid-in or capital surplus, or land, bldg., and equipment fund			
	28 Retained earnings, accumulated income, endowment, or other funds			
29 Total net assets or fund balances (see instructions)	23,396,063	32,552,293		
30 Total liabilities and net assets/fund balances (see instructions) .	30,555,195	32,552,293		

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	23,396,063
2 Enter amount from Part I, line 27a	2	9,156,230
3 Other increases not included in line 2 (itemize) ▶ _____	3	
4 Add lines 1, 2, and 3	4	32,552,293
5 Decreases not included in line 2 (itemize) ▶ _____	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29 .	6	32,552,293

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.)
1 a PUBLICLY TRADED SECURITIES	P	2020-01-01	2020-12-31
b PUBLICLY TRADED SECURITIES	P	2019-01-01	2020-12-31
c CAPITAL GAIN DISTRIBUTIONS	P	2019-01-01	2020-12-31
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	4,279,490		4,440,883	-161,393
b	6,201,851		6,008,423	193,428
c	4,764			4,764
d				
e				

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) 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			-161,393
b			193,428
c			4,764
d			
e			

2 Capital gain net income or (net capital loss)	{	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7		2	36,799
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8	{			3	-161,393

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

SECTION 4940(e) REPEALED ON DECEMBER 20, 2019 - DO NOT COMPLETE

1 Reserved	(a) Reserved	(b) Reserved	(c) Reserved	(d) Reserved
2 Reserved				2
3 Reserved				3
4 Reserved				4
5 Reserved				5
6 Reserved				6
7 Reserved				7
8 Reserved				8

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

Table with 11 rows for excise tax calculations. Includes fields for exempt foundations, tax under section 511, tax based on investment income, credits/payments, and tax due/overpayment. Total tax due is 5,233.

Part VII-A Statements Regarding Activities

Table with 10 rows for activity statements. Columns include question number, Yes, and No. Questions cover political activities, tax on political expenditures, and asset requirements.

Part VII-A Statements Regarding Activities (continued)

Table with 3 columns: Question, Yes, No. Rows 11-14 regarding controlled entities, distributions, public inspection requirements, and books in care.

Located at 411 EAST WISCONSIN AVE 2400 MILWAUKEE WI ZIP+4 532024428

Table with 3 columns: Question, Yes, No. Rows 15-16 regarding nonexempt charitable trusts and foreign accounts.

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.

Main table with 3 columns: Question, Yes, No. Rows 1a-4b regarding Form 4720 exceptions and requirements.

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

5a During the year did the foundation pay or incur any amount to:
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?
(3) Provide a grant to an individual for travel, study, or other similar purposes?
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions.
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?
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.
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?
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?
6b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?
7b If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?
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 during the year?

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

1 List all officers, directors, trustees, foundation managers and their compensation. See instructions

Table with 5 columns: (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. Includes entries for AGUSTIN A RAMIREZ JR and REBECCA PAGE RAMIREZ.

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

Table with 5 columns: (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. Includes a row for NONE.

Total number of other employees paid over \$50,000. [arrow]

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services. ▶

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.

1	Expenses

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

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

1	Amount
All other program-related investments. See instructions.	

Total. Add lines 1 through 3 ▶

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities.	1a	13,507,440
b	Average of monthly cash balances.	1b	471,578
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	13,979,018
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	
3	Subtract line 2 from line 1d.	3	13,979,018
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	209,685
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	13,769,333
6	Minimum investment return. Enter 5% of line 5.	6	688,467

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	688,467
2a	Tax on investment income for 2020 from Part VI, line 5.	2a	5,072
b	Income tax for 2020. (This does not include the tax from Part VI.).	2b	
c	Add lines 2a and 2b.	2c	5,072
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	683,395
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	683,395
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	683,395

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	1,923,295
b	Program-related investments—total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	1,923,295
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions.	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	1,923,295

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2019	(c) 2019	(d) 2020
1 Distributable amount for 2020 from Part XI, line 7				683,395
2 Undistributed income, if any, as of the end of the end of 2020:				
a Enter amount for 2019 only.				
b Total for prior years: 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2020:				
a From 2015.	229,291			
b From 2016.	15,920,537			
c From 2017.	11,717,273			
d From 2018.	4,439,438			
e From 2019.				
f Total of lines 3a through e.	32,306,539			
4 Qualifying distributions for 2020 from Part XII, line 4: ▶ \$ _____ 1,923,295				
a Applied to 2019, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).	1,820,385			
d Applied to 2020 distributable amount.				102,910
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2020. (If an amount appears in column (d), the same amount must be shown in column (a).)	580,485			580,485
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	33,546,439			
b Prior years' undistributed income. Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b. Taxable amount—see instructions				
e Undistributed income for 2019. Subtract line 4a from line 2a. Taxable amount—see instructions				
f Undistributed income for 2021. 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).	1,820,385			
8 Excess distributions carryover from 2015 not applied on line 5 or line 7 (see instructions).				
9 Excess distributions carryover to 2021. Subtract lines 7 and 8 from line 6a	31,726,054			
10 Analysis of line 9:				
a Excess from 2016.	15,569,343			
b Excess from 2017.	11,717,273			
c Excess from 2018.	4,439,438			
d Excess from 2019.				
e Excess from 2020.				

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

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

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

2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

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

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

1 Information Regarding Foundation Managers:

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

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

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

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

a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed:
 CO-ORDINATOR OF THE SCHOLARSHIP PRO
 PO BOX 257
 WAUKESHA, WI 531870257
 (414) 277-5000

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

c Any submission deadlines:
 APRIL FOR FOLLOWING YEAR

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:
 DETAILS PROVIDED TO APPLICANTS WITH APPLICATIONS

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 <i>Paid during the year</i> See Additional Data Table				
Total ▶ 3a				1,863,500
b <i>Approved for future payment</i>				
Total ▶ 3b				

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?
a Transfers from the reporting foundation to a noncharitable exempt organization of:
(1) Cash.
(2) Other assets.
b Other transactions:
(1) Sales of assets to a noncharitable exempt organization.
(2) Purchases of assets from a noncharitable exempt organization.
(3) Rental of facilities, equipment, or other assets.
(4) Reimbursement arrangements.
(5) Loans or loan guarantees.
(6) Performance of services or membership or fundraising solicitations.
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.
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.

Table with 4 columns: (a) Line No., (b) Amount involved, (c) Name of noncharitable exempt organization, (d) Description of transfers, transactions, and sharing arrangements

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

b If "Yes," complete the following schedule. Table with 3 columns: (a) Name of organization, (b) Type of organization, (c) Description of relationship

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 [Signature] 2021-09-02 [Title]
May the IRS discuss this return with the preparer shown below (see instr.) [x] Yes [] No

Paid Preparer Use Only
Print/Type preparer's name: Karen L Alexander
Preparer's Signature: [Signature]
Date: [Date]
Check if self-employed: []
PTIN: P00528195
Firm's name: Quarles & Brady LLP
Firm's EIN: 39-0432630
Firm's address: 411 E Wisconsin Ave Ste 2350 Milwaukee, WI 53202
Phone no. (414) 277-5000

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
SCHEDULE ATTACHED PO BOX 257 WAUKESHA, WI 53187	NONE	NC	SCHOLARSHIP	286,000
ST MARCUS FOUNDATION INC 2215 N PALMER ST MILWAUKEE, WI 53212	N/A	PC	GENERAL OPERATING SUPPORT	62,500
THE MEDICAL COLLEGE OF WISCONSIN IN 8701 WATERTOWN PLANK ROAD MILWAUKEE, WI 53226	N/A	PC	PARKINSON'S DISEASE RESEARCH, RAMIREZ LEAN SCHOLARS FUND	110,000
Total ▶ 3a				1,863,500

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
WISCONSIN LUTHERAN COLLEGE 8800 W BLUEMOUND RD MILWAUKEE, WI 53226	N/A	PC	GENERAL OPERATING SUPPORT	10,000
GEORGIA TECH FOUNDATION INC 760 SPRING STREET NW STE 400 ATLANTA, GA 30308	N/A	PC	GENERAL OPERATING SUPPORT	10,000
MILWAUKEE PUBLIC MUSEUM INC 800 W WELLS ST MILWAUKEE, WI 53233	N/A	PC	GENERAL OPERATING SUPPORT	2,000
Total ▶ 3a				1,863,500

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
WI INSTITUTE FOR LAW LIBERTY 1139 E KNAPP ST MILWAUKEE, WI 53202	N/A	PC	GENERAL OPERATING SUPPORT	10,000
EVAN SCHOLARS FOUNDATION 2501 PATRIOT BLVD GLENVIEW, IL 60026	N/A	PC	GENERAL OPERATING SUPPORT	500
MISSIONARY VENTURES INTERNATIONAL I 1017 MAITLAND CENTER COMMONS BLVD MAITLAND, FL 32751	N/A	PC	EVENT SPONSORSHIP, SCHOOL DEVELOPMENT	355,000
Total	▶ 3a			1,863,500

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
MILWAUKEE COLLEGE PREP 2449 N 36TH STREET MILWAUKEE, WI 53210	N/A	PC	GENERAL OPERATING SUPPORT	20,000
SCHOOL CHOICE WISCONSIN 350 BISHOPS WAY STE 104 BROOKFIELD, WI 53005	N/A	PC	GENERAL OPERATING SUPPORT	10,000
THE PHILANTHROPY ROUNDTABLE 1120 20TH STREET SUITE 550 SOUTH WASHINGTON, DC 20036	N/A	PC	GENERAL OPERATING SUPPORT	5,000
Total ▶ 3a				1,863,500

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
ALL-IN MILWAUKEE INC 135 W WELLS ST STE 100 MILWAUKEE, WI 53203	N/A	PC	GENERAL OPERATING SUPPORT	47,500
ST AUGUSTINE PREPARATORY ACADEMY 2607 SOUTH 5TH STREET MILWAUKEE, WI 53207	N/A	PC	GENERAL OPERATING SUPPORT, EVENT SPONSORSHIP	25,000
BOYS AND GIRLS CLUB OF GREATER MILW 1558 N 6TH STREET MILWAUKEE, WI 53212	N/A	PC	CAMP WHITCOMB/MASON	5,000
Total ▶ 3a				1,863,500

Form 990PF Part XV Line 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 <i>Paid during the year</i>				
SIERRA DELTA INC PO BOX 211 REEDSBURG, WI 53959	N/A	PC	GENERAL OPERATING SUPPORT	5,000
UNITED WAY OF GREATER MILW WAUKESHA 225 WEST VINE ST MILWAUKEE, WI 53212	N/A	PC	ST AUGUSTINE PREP ACADEMY	500,000
WORLD MISSIONS TODAY PO BOX 770756 ORLANDO, FL 32877	N/A	PC	GENERAL OPERATING SUPPORT	400,000
Total ▶ 3a				1,863,500

TY 2020 General Explanation Attachment

Name: AGUSTIN A RAMIREZ JR FAMILY FOUNDATION

EIN: 39-6626017

Software ID: 20011551

Software Version: 2020v4.0

General Explanation Attachment

Identifier	Return Reference	Explanation	
1		General Explanation Supplemental Information for Form 990-PF	PART II, LINE 21 MORTGAGES AND OTHER NOTES PAYABLE----- PURPOSE OF LOAN: TO SUPPORT AT NO INTEREST RATE THE FOUNDATION'S SUPPORT OF ST. AUGUSTINE PREPARATORY ACADEMY .PART VII-B, LINE 5b-----DURING THE YEAR, THE FOUNDATION MADE SCHOLARSHIP GRANTS TO INDIVIDUALS. THESE WERE PURSUANT TO AN OBJECTIVE AND NON-DISCRIMINATORY PROCEDURE APPROVED IN ADVANCE BY THE INTERNAL REVENUE SERVICE IN ACCORDANCE WITH IRC SEC. 4945(g) AND TREAS. REG. SEC. 53.4945-4(b).

TY 2020 Investments Corporate Stock Schedule**Name:** AGUSTIN A RAMIREZ JR FAMILY FOUNDATION**EIN:** 39-6626017**Software ID:** 20011551**Software Version:** 2020v4.0**Investments Corporation Stock Schedule**

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ALPHABET INC CL A	46,588	61,342
AMERICAN EXPRESS CO	22,704	22,731
AMERICAN TOWER CORP NEW	21,240	22,446
AMGEN INC	39,256	40,926
APPLE INC	47,775	95,537
AUTOZONE, INC	43,311	43,861
AVERY DENNISON CORP	29,879	35,055
BANK OF AMERICA CORPORATION	48,649	48,799
BEST BUY COMPANY INC	30,820	39,916
BRISTOL MYERS SQUIBB COMPANY	39,276	41,560
CDW CORP	44,278	43,491
CADENCE DESIGN SYSTEMS	31,472	46,386
COMCAST CORPORATION NEW CLASS A	36,136	41,920
CONOCOPHILLIPS	8,470	13,597
D R HORTON INC	33,296	42,730
DISCOVER FINL SVCS COM	13,266	19,554
DOVER CORPORATION	40,344	45,450
BORG WARNER INC	40,876	39,413
EVERSOURCE ENERGY	33,857	34,431
FACEBOOK INC CL A	32,371	45,345
FORTUNE BRANDS HOMES & SECURITY INC	41,862	42,003
HOME DEPOT INC	37,954	42,499
JPMORGAN CHASE & CO NEW	46,568	48,287
KEURIG DR PEPPER INC	39,356	42,240
KIMBERLY-CLARK CORPORATION	36,036	36,943
LAM RESEARCH CORPORATION	35,184	58,561
LEIDOS HOLDINGS INC	39,567	42,048
LOCKHEED MARTIN CORPORATION	33,842	34,788
MASTERCARD INC CL A	26,338	33,552
MERCK & CO INC NEW	43,457	41,718

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
MICROSOFT CORPORATION	51,021	73,399
MICROCHIP TECHNOLOGY INCORPORATED	38,895	51,101
MONDELEZ INTERNATIONAL INC CLASS A	40,332	44,730
MORGAN STANLEY	40,565	59,621
NEXTERA ENERGY INC	30,461	40,735
NORFOLK SOUTHERN CORPORATION	29,489	36,592
PACKAGING CORPORATION OF AMERICA	30,077	36,822
PARKER HANNIFIN CORPORATION	36,573	54,482
PAYPAL HOLDINGS INC	30,986	49,182
PIONEER NATURAL RESOURCES COMPANY	16,274	30,750
PROLOGIS INC	20,275	23,520
REGENERON PHARMACEUTICALS INC	10,569	11,112
SOUTHWEST AIRLINES CO	8,442	8,390
T-MOBILE US INC	31,938	55,288
TEXAS INSTRUMENTS INC	44,872	46,285
THERMO FISHER SCIENTIFIC	33,063	50,304
UNITEDHEALTH GROUP INCORPORATED	36,555	48,394
VERIZON COMMUNICATIONS ICN	40,609	41,125
VISA INC CL A	30,202	36,747
WAL-MART STORES INC	35,681	43,245
WILLIAMS COMPANIES	16,424	15,238
ZEBRA TECHNOLOGIES CORPORATION	34,753	56,112
ABBVIE INC	40,483	46,075
EATON CORP PLC		
QORVO INC	41,828	54,869
ABBOTT LABORATORIES	26,722	32,847
ACCENTURE PLC		
CHEVRON CORP		
CISCO SYSTEMS INC		
CITIZENS FINANCIAL GROUP INC		

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
DELTA AIR LINES INC		
EXXON MOBIL CORPORATION		
FIDELITY NATIONAL INFORMATION SERVICES		
HILL ROM HOLDINGS INC		
INTEL CORPORATION		
MARATHON PETROLEUM CORP		
METLIFE INCORPORATED		
ONEOK INC		
RAYTHEON COMPANY		
ROYAL CARIBBEAN CRUISES LTD		
STARWOOD PROPERTIES TRUST INC		
STORE CAPITAL CORP		
STRYKER CORPORATION		
SYSCO CORPORATION		
WALT DISNEY COMPANY		
WASTE MANAGEMENT INC		
ACTIVISION BLIZZARD INC	28,868	39,925
ADOBE SYSTEMS INC	32,081	46,011
ALEXANDRIA REAL ESTATE	18,739	19,604
AMAZON COM INC	42,399	71,652
AON PLC	33,914	42,254
BANK OF NEW YORK MELLON CORP	32,913	39,469
STERIS PLC	31,720	37,529

TY 2020 Investments - Other Schedule**Name:** AGUSTIN A RAMIREZ JR FAMILY FOUNDATION**EIN:** 39-6626017**Software ID:** 20011551**Software Version:** 2020v4.0**Investments Other Schedule 2**

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
BNP DD CBEN SPX 5/20/20	AT COST		
BNP MARKET PLUS SPX 11/4/20	AT COST		
CITI DD CBEN SPX 6/24/20	AT COST		
CS MARKET PLUS SPX 10/20/20	AT COST		
MS DD CBEN SPX 7/9/20	AT COST		
MS DD CBEN SPX 8/26/20	AT COST		
GS DD CBEN XOP US 10/21/20	AT COST		
ISHARES CORE S&P 500 ETF	AT COST	2,753,690	3,203,578
JPMORGAN MANAGED INC FUND INSTL	AT COST	4,525,631	4,540,201
MS DD CBEN SPX 10/15/20	AT COST		
TD BANK DD CBEN SPX 6/3/20	AT COST		
UBS DD SPX 5/28/20	AT COST		
UBS DD CBEN SPX 9/2/20	AT COST		
JPM DD CBEN SPX 3/24/21 73.7% BARRIER 7%	AT COST	300,000	318,240
JPM DD CBEN SPX 3/31/21 74% BARRIER 10%	AT COST	300,000	327,030
JPM DD CBEN SPX 4/1/21 68.84% BARRIER 10	AT COST	200,000	218,560
JPM DD CBEN SPX 8/4/21 80.75% BARRIER 10	AT COST	250,000	264,300
JPM DD CBEN SPX 9/29/21 79.25% BARRIER	AT COST	100,000	104,380
JPM DD CBEN SPX 10/20/21 80.55% BARRIER	AT COST	100,000	103,770
SG DD CBEN SPX 9/22/21 82.6% BARRIER 10%	AT COST	200,000	205,360
JPM SHORT DURATION CORE PLUS	AT COST	3,416,488	3,419,959
JPM EMG MARKET EQUITY FD	AT COST	250,355	260,352
JPM LARGE CAP GROWTH FUND	AT COST	255,260	254,464

TY 2020 Legal Fees Schedule**Name:** AGUSTIN A RAMIREZ JR FAMILY FOUNDATION**EIN:** 39-6626017**Software ID:** 20011551**Software Version:** 2020v4.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
QUARLES & BRADY LLP, ATTORNEY FEES	45,384	4,538	0	40,846

TY 2020 Mortgages and Notes Payable Schedule**Name:** AGUSTIN A RAMIREZ JR FAMILY FOUNDATION**EIN:** 39-6626017**Software ID:** 20011551**Software Version:** 2020v4.0**Total Mortgage Amount:****Mortgages and Notes Payable Schedule**

Item No.	1
Lender's Name	HUSCO INTERNATIONAL INC
Lender's Title	
Relationship to Insider	
Original Amount of Loan	21,367,500
Balance Due	
Date of Note	2017-01
Maturity Date	2024-06
Repayment Terms	AT MATURITY
Interest Rate	
Security Provided by Borrower	NONE
Purpose of Loan	SEE SUPPLEMENTAL INFORMATION
Description of Lender Consideration	CASH
Consideration FMV	

TY 2020 Other Expenses Schedule**Name:** AGUSTIN A RAMIREZ JR FAMILY FOUNDATION**EIN:** 39-6626017**Software ID:** 20011551**Software Version:** 2020v4.0**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OFFICE EXPENSE	305	31		274
SELECTION COMMITTEE	2,000			2,000
US TREASURY SCHOLARSHIP USER FEE	2,000			2,000

TY 2020 Other Income Schedule**Name:** AGUSTIN A RAMIREZ JR FAMILY FOUNDATION**EIN:** 39-6626017**Software ID:** 20011551**Software Version:** 2020v4.0**Other Income Schedule**

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Other Investment Income	106		

TY 2020 Other Notes/Loans Receivable Short Schedule**Name:** AGUSTIN A RAMIREZ JR FAMILY FOUNDATION**EIN:** 39-6626017**Software ID:** 20011551**Software Version:** 2020v4.0

Name of 501(c)(3) Organization	Balance Due
CHASE NMTC ST AUGUSTINE INVEST	17,367,500

TY 2020 Other Professional Fees Schedule**Name:** AGUSTIN A RAMIREZ JR FAMILY FOUNDATION**EIN:** 39-6626017**Software ID:** 20011551**Software Version:** 2020v4.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
DANA INVESTMENT - ADVISORY FEES	10,848	10,848	0	0
JPMORGAN CHASE - ADVISORY FEES	1,901	1,901	0	0
RICARDO JUSINO - CONSULTANT	6,255	0	0	6,255
SAVAGE SOLUTIONS - WEBSITE HOSTING	420	0	0	420
SURVEY MONKEY - SCHOLARSHIP WEBSITE	8,000	0	0	8,000

TY 2020 Taxes Schedule**Name:** AGUSTIN A RAMIREZ JR FAMILY FOUNDATION**EIN:** 39-6626017**Software ID:** 20011551**Software Version:** 2020v4.0**Taxes Schedule**

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAX	15,000			
FOREIGN TAX WITHHELD	205		205	

Schedule B
(Form 990, 990-EZ,
or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors
▶ Attach to Form 990, 990-EZ, or 990-PF.
▶ Go to www.irs.gov/Form990 for the latest information.

OMB No. 1545-0047
2020

Name of the organization
AGUSTIN A RAMIREZ JR FAMILY FOUNDATION

Employer identification number
39-6626017

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

501(c)() (enter number) organization

4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

527 political organization

Form 990-PF

501(c)(3) exempt private foundation

4947(a)(1) nonexempt charitable trust treated as a private foundation

501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

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

General Rule

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

Special Rules

For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.

For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year ▶ \$ _____

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

Name of organization
AGUSTIN A RAMIREZ JR FAMILY FOUNDATION

Employer identification number
39-6626017

Part I **Contributors** (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	HUSCO INTERNATIONAL INC W239 N218 PEWAUKEE ROAD WAUKESHA, WI 531870257	\$ 10,529,517	<input checked="" type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
2	AGUSTIN REBECCA RAMIREZ PO BOX 636 PEWAUKEE, WI 530720636	\$ 200,000	<input checked="" type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
.		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
.		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
.		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
.		\$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)

Name of organization
 AGUSTIN A RAMIREZ JR FAMILY FOUNDATION

Employer identification number
 39-6626017

Part II Noncash Property

(a) No. from Part I	(b) Description of noncash property given <small>(see instructions). Use duplicate copies of Part II if additional space is needed.</small>	(c) FMV (or estimate) <small>(See instructions)</small>	(d) Date received
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____

Name of organization
AGUSTIN A RAMIREZ JR FAMILY FOUNDATION

Employer identification number
39-6626017

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

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

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

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

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

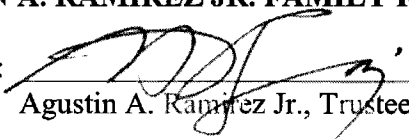
Agustin A. Ramirez Jr. Family Foundation
EIN: 39-6626017

FORM 990-PF (2020)
Part XIII, line 4c

Election to Treat Qualifying Distributions as Distributions Out of Corpus

Pursuant to Internal Revenue Code Sections 170(b)(1)(F)(ii) and 4942(g)(3) and Treasury Regulations Sections 1.170A-9(h) and 53.4942(a)-(d)(1)(iii) and (d)(2), the Agustin A. Ramirez Jr. Family Foundation hereby elects to treat qualifying distributions of \$1,820,385 as distributions made out of corpus.

AGUSTIN A. RAMIREZ JR. FAMILY FOUNDATION

By: 
Agustin A. Ramirez Jr., Trustee