

Form 990-T

Exempt Organization Business Income Tax Return (and proxy tax under section 6033(e))

OMB No 1545-0047

For calendar year 2019 or other tax year beginning 07/01, 2019, and ending 06/30, 2020

2019

Department of the Treasury Internal Revenue Service

Go to www.irs.gov/Form990T for instructions and the latest information

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

Do not enter SSN numbers on this form as it may be made public if your organization is a 501(c)(3)

Form header section including: A Check box if address changed; B Exempt under section 501(c)(3); C Book value of all assets; D Employer identification number; E Unrelated business activity code; F Group exemption number; G Check organization type.

H Enter the number of the organization's unrelated trades or businesses Describe the only (or first) unrelated trade or business here INVESTMENT IN PARTNERSHIPS

I During the tax year, was the corporation a subsidiary in an affiliated group or a parent-subsidiary controlled group? Yes No

J The books are in care of SHERRI FURMAN Telephone number 319-335-3305

Table with 4 columns: Description, (A) Income, (B) Expenses, (C) Net. Rows include Gross receipts or sales, Less returns and allowances, Cost of goods sold, Capital gain net income, etc.

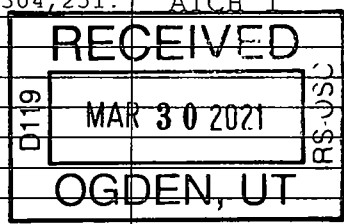


Table with 4 columns: Description, (A) Income, (B) Expenses, (C) Net. Rows include Deductions Not Taken Elsewhere (Compensation of officers, Salaries and wages, etc.)

For Paperwork Reduction Act Notice, see instructions Form 990-T (2019)

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Part III Total Unrelated Business Taxable Income

Table with 3 columns: Line number, Description, and Amount. Includes lines 32-39 for unrelated business taxable income calculation.

Part IV Tax Computation

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

Part V Tax and Payments

Table with 3 columns: Line number, Description, and Amount. Includes lines 46-56 for tax and payments.

Part VI Statements Regarding Certain Activities and Other Information (see instructions)

Table with 3 columns: Line number, Description, and Yes/No columns. Includes lines 57-59 regarding foreign interests and tax-exempt interest.

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 of officer (Michael J Engle), Date (3/22/2021), Title (VP, CFO, TREASURER).

Paid Preparer Use Only: Print/Type preparer's name (MICHAEL J ENGLE), Firm's name (BKD, LLP), Firm's address (1201 WALNUT, SUITE 1700, KANSAS CITY, MO 64106-2246).

**Schedule A - Cost of Goods Sold.** Enter method of inventory valuation ▶

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

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

(see instructions)

1 Description of property		
(1)		
(2)		
(3)		
(4)		
<b>2 Rent received or accrued</b>		
(a) From personal property (if the percentage of rent for personal property is more than 10% but not more than 50%)	(b) From real and personal property (if the percentage of rent for personal property exceeds 50% or if the rent is based on profit or income)	3(a) Deductions directly connected with the income in columns 2(a) and 2(b) (attach schedule)
(1)		
(2)		
(3)		
(4)		
Total	Total	
(c) Total income. Add totals of columns 2(a) and 2(b) Enter here and on page 1, Part I, line 6, column (A) ▶		(b) Total deductions Enter here and on page 1, Part I, line 6, column (B) ▶

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

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

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

Table with 6 columns: 1 Name of controlled organization, 2 Employer identification number, 3 Net unrelated income (loss), 4 Total of specified payments made, 5 Part of column 4 that is included in the controlling organization's gross income, 6 Deductions directly connected with income in column 5.

Nonexempt Controlled Organizations

Table with 5 columns: 7 Taxable Income, 8 Net unrelated income (loss), 9 Total of specified payments made, 10 Part of column 9 that is included in the controlling organization's gross income, 11 Deductions directly connected with income in column 10. Includes a Totals row.

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

Table with 5 columns: 1 Description of income, 2 Amount of income, 3 Deductions directly connected (attach schedule), 4 Set-asides (attach schedule), 5 Total deductions and set-asides (col 3 plus col 4). Includes a Totals row.

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

Table with 7 columns: 1 Description of exploited activity, 2 Gross unrelated business income from trade or business, 3 Expenses directly connected with production of unrelated business income, 4 Net income (loss) from unrelated trade or business, 5 Gross income from activity that is not unrelated business income, 6 Expenses attributable to column 5, 7 Excess exempt expenses (column 6 minus column 5, but not more than column 4). Includes a Totals row.

Schedule J - Advertising Income (see instructions)

Part I Income From Periodicals Reported on a Consolidated Basis

Table with 7 columns: 1 Name of periodical, 2 Gross advertising income, 3 Direct advertising costs, 4 Advertising gain or (loss) (col 2 minus col 3) If a gain, compute cols 5 through 7, 5 Circulation income, 6 Readership costs, 7 Excess readership costs (column 6 minus column 5, but not more than column 4). Includes a Totals row.

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

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

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

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

**SCHEDULE M  
(Form 990-T)**

**Unrelated Business Taxable Income from an  
Unrelated Trade or Business**

OMB No 1545-0047

**2019**

For calendar year 2019 or other tax year beginning 07/01, 2019, and ending 06/30, 2020

Department of the Treasury  
Internal Revenue Service

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

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

Name of the organization **STATE UNIVERSITY OF IOWA FOUNDATION** Employer identification number **42-0796760**

Unrelated Business Activity Code (see instructions) ▶ 812900

Describe the unrelated trade or business ▶ TRAVEL TOURS

<b>Part I Unrelated Trade or Business Income</b>				(A) Income	(B) Expenses	(C) Net
<b>1a</b>	Gross receipts or sales	<u>129,802.</u>				
<b>b</b>	Less returns and allowances		<b>c Balance ▶</b>	<b>1c</b>	<u>129,802.</u>	
<b>2</b>	Cost of goods sold (Schedule A, line 7)		<b>2</b>			
<b>3</b>	Gross profit Subtract line 2 from line 1c		<b>3</b>	<u>129,802.</u>		<u>129,802.</u>
<b>4a</b>	Capital gain net income (attach Schedule D)		<b>4a</b>			
<b>b</b>	Net gain (loss) (Form 4797, Part II, line 17) (attach Form 4797)		<b>4b</b>			
<b>c</b>	Capital loss deduction for trusts		<b>4c</b>			
<b>5</b>	Income (loss) from a partnership or an S corporation (attach statement)		<b>5</b>			
<b>6</b>	Rent income (Schedule C)		<b>6</b>			
<b>7</b>	Unrelated debt-financed income (Schedule E)		<b>7</b>			
<b>8</b>	Interest, annuities, royalties, and rents from a controlled organization (Schedule F)		<b>8</b>			
<b>9</b>	Investment income of a section 501(c)(7), (9), or (17) organization (Schedule G)		<b>9</b>			
<b>10</b>	Exploited exempt activity income (Schedule I)		<b>10</b>			
<b>11</b>	Advertising income (Schedule J)		<b>11</b>			
<b>12</b>	Other income (See instructions, attach schedule)		<b>12</b>			
<b>13</b>	<b>Total</b> Combine lines 3 through 12		<b>13</b>	<u>129,802.</u>		<u>129,802.</u>

**Part II Deductions Not Taken Elsewhere** (See instructions for limitations on deductions ) (Deductions must be directly connected with the unrelated business income )

<b>14</b>	Compensation of officers, directors, and trustees (Schedule K)		<b>14</b>			
<b>15</b>	Salaries and wages		<b>15</b>			<u>63,211.</u>
<b>16</b>	Repairs and maintenance		<b>16</b>			
<b>17</b>	Bad debts		<b>17</b>			
<b>18</b>	Interest (attach schedule) (see instructions)		<b>18</b>			
<b>19</b>	Taxes and licenses		<b>19</b>			
<b>20</b>	Depreciation (attach Form 4562)		<b>20</b>			
<b>21</b>	Less depreciation claimed on Schedule A and elsewhere on return		<b>21a</b>			
<b>22</b>	Depletion		<b>22</b>			
<b>23</b>	Contributions to deferred compensation plans		<b>23</b>			
<b>24</b>	Employee benefit programs		<b>24</b>			
<b>25</b>	Excess exempt expenses (Schedule I)		<b>25</b>			
<b>26</b>	Excess readership costs (Schedule J)		<b>26</b>			
<b>27</b>	Other deductions (attach schedule)	<u>ATTCH 4</u>	<b>27</b>			<u>11,726.</u>
<b>28</b>	<b>Total deductions.</b> Add lines 14 through 27		<b>28</b>			<u>74,937.</u>
<b>29</b>	Unrelated business taxable income before net operating loss deduction Subtract line 28 from line 13		<b>29</b>			<u>54,865.</u>
<b>30</b>	Deduction for net operating loss arising in tax years beginning on or after January 1, 2018 (see instructions)		<b>30</b>			
<b>31</b>	<b>Unrelated business taxable income</b> Subtract line 30 from line 29		<b>31</b>			<u>54,865.</u>

For Paperwork Reduction Act Notice, see instructions

Schedule M (Form 990-T) 2019

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**SCHEDULE M  
(Form 990-T)**

**Unrelated Business Taxable Income from an  
Unrelated Trade or Business**

OMB No 1545-0047

**2019**

For calendar year 2019 or other tax year beginning 07/01, 2019, and ending 06/30, 2020

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501(c)(3) Organizations Only

Name of the organization **STATE UNIVERSITY OF IOWA FOUNDATION** Employer identification number **42-0796760**

Unrelated Business Activity Code (see instructions) ▶ 541800  
Describe the unrelated trade or business ▶ CREDIT CARD MARKETING

<b>Part I Unrelated Trade or Business Income</b>		(A) Income	(B) Expenses	(C) Net
1 a	Gross receipts or sales <u>2,000.</u>			
b	Less returns and allowances <u>                    </u> c Balance ▶			
	<b>1 c</b>	2,000.		
2	Cost of goods sold (Schedule A, line 7) . . . . .	<b>2</b>		
3	Gross profit Subtract line 2 from line 1c . . . . .	<b>3</b>	2,000.	2,000.
4 a	Capital gain net income (attach Schedule D) . . . . .	<b>4 a</b>		
b	Net gain (loss) (Form 4797, Part II, line 17) (attach Form 4797) . . . . .	<b>4 b</b>		
c	Capital loss deduction for trusts . . . . .	<b>4 c</b>		
5	Income (loss) from a partnership or an S corporation (attach statement) . . . . .	<b>5</b>		
6	Rent income (Schedule C) . . . . .	<b>6</b>		
7	Unrelated debt-financed income (Schedule E). . . . .	<b>7</b>		
8	Interest, annuities, royalties, and rents from a controlled organization (Schedule F) . . . . .	<b>8</b>		
9	Investment income of a section 501(c)(7), (9), or (17) organization (Schedule G) . . . . .	<b>9</b>		
10	Exploited exempt activity income (Schedule I) . . . . .	<b>10</b>		
11	Advertising income (Schedule J) . . . . .	<b>11</b>		
12	Other income (See instructions, attach schedule) . . . . .	<b>12</b>		
13	<b>Total</b> Combine lines 3 through 12 . . . . .	<b>13</b>	2,000.	2,000.

**Part II Deductions Not Taken Elsewhere** (See instructions for limitations on deductions ) (Deductions must be directly connected with the unrelated business income )

14	Compensation of officers, directors, and trustees (Schedule K) . . . . .	<b>14</b>		
15	Salaries and wages . . . . .	<b>15</b>		1,082.
16	Repairs and maintenance . . . . .	<b>16</b>		
17	Bad debts . . . . .	<b>17</b>		
18	Interest (attach schedule) (see instructions). . . . .	<b>18</b>		
19	Taxes and licenses . . . . .	<b>19</b>		
20	Depreciation (attach Form 4562). . . . .	<b>20</b>		
21	Less depreciation claimed on Schedule A and elsewhere on return . . . . .	<b>21 a</b>		
		<b>21 b</b>		
22	Depletion . . . . .	<b>22</b>		
23	Contributions to deferred compensation plans . . . . .	<b>23</b>		
24	Employee benefit programs . . . . .	<b>24</b>		
25	Excess exempt expenses (Schedule I) . . . . .	<b>25</b>		
26	Excess readership costs (Schedule J). . . . .	<b>26</b>		
27	Other deductions (attach schedule) . . . . .	<b>27</b>		
28	<b>Total deductions.</b> Add lines 14 through 27 . . . . .	<b>28</b>		1,082.
29	Unrelated business taxable income before net operating loss deduction Subtract line 28 from line 13	<b>29</b>		918.
30	Deduction for net operating loss arising in tax years beginning on or after January 1, 2018 (see instructions). . . . .	<b>30</b>		
31	<b>Unrelated business taxable income</b> Subtract line 30 from line 29 . . . . .	<b>31</b>		918.

For Paperwork Reduction Act Notice, see instructions Schedule M (Form 990-T) 2019

**SCHEDULE M  
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Name of the organization  
**STATE UNIVERSITY OF IOWA FOUNDATION**

Employer identification number  
**42-0796760**

Unrelated Business Activity Code (see instructions) ▶ **541800**

Describe the unrelated trade or business ▶ **IOWA ALUMNI MAGAZINE ADVERTISING**

<b>Part I Unrelated Trade or Business Income</b>		(A) Income	(B) Expenses	(C) Net
<b>1 a</b>	Gross receipts or sales			
<b>b</b>	Less returns and allowances			
	<b>c</b> Balance ▶	<b>1 c</b>		
<b>2</b>	Cost of goods sold (Schedule A, line 7)	<b>2</b>		
<b>3</b>	Gross profit Subtract line 2 from line 1c	<b>3</b>		
<b>4 a</b>	Capital gain net income (attach Schedule D)	<b>4 a</b>		
<b>b</b>	Net gain (loss) (Form 4797, Part II, line 17) (attach Form 4797)	<b>4 b</b>		
<b>c</b>	Capital loss deduction for trusts	<b>4 c</b>		
<b>5</b>	Income (loss) from a partnership or an S corporation (attach statement)	<b>5</b>		
<b>6</b>	Rent income (Schedule C)	<b>6</b>		
<b>7</b>	Unrelated debt-financed income (Schedule E)	<b>7</b>		
<b>8</b>	Interest, annuities, royalties, and rents from a controlled organization (Schedule F)	<b>8</b>		
<b>9</b>	Investment income of a section 501(c)(7), (9), or (17) organization (Schedule G)	<b>9</b>		
<b>10</b>	Exploited exempt activity income (Schedule I)	<b>10</b>		
<b>11</b>	Advertising income (Schedule J) <b>ATCH 5</b>	<b>11</b>	36,100.	71,799.
<b>12</b>	Other income (See instructions, attach schedule)	<b>12</b>		
<b>13</b>	<b>Total</b> Combine lines 3 through 12	<b>13</b>	36,100.	71,799.
				-35,699.

**Part II Deductions Not Taken Elsewhere** (See instructions for limitations on deductions ) (Deductions must be directly connected with the unrelated business income )

<b>14</b>	Compensation of officers, directors, and trustees (Schedule K)	<b>14</b>		
<b>15</b>	Salaries and wages	<b>15</b>		
<b>16</b>	Repairs and maintenance	<b>16</b>		
<b>17</b>	Bad debts	<b>17</b>		
<b>18</b>	Interest (attach schedule) (see instructions)	<b>18</b>		
<b>19</b>	Taxes and licenses	<b>19</b>		
<b>20</b>	Depreciation (attach Form 4562)	<b>20</b>		
<b>21</b>	Less depreciation claimed on Schedule A and elsewhere on return	<b>21 a</b>		
<b>22</b>	Depletion	<b>22</b>		
<b>23</b>	Contributions to deferred compensation plans	<b>23</b>		
<b>24</b>	Employee benefit programs	<b>24</b>		
<b>25</b>	Excess exempt expenses (Schedule I)	<b>25</b>		
<b>26</b>	Excess readership costs (Schedule J)	<b>26</b>		
<b>27</b>	Other deductions (attach schedule)	<b>27</b>		
<b>28</b>	<b>Total deductions</b> Add lines 14 through 27	<b>28</b>		
<b>29</b>	Unrelated business taxable income before net operating loss deduction Subtract line 28 from line 13	<b>29</b>		-35,699.
<b>30</b>	Deduction for net operating loss arising in tax years beginning on or after January 1, 2018 (see instructions)	<b>30</b>		
<b>31</b>	Unrelated business taxable income Subtract line 30 from line 29	<b>31</b>		-35,699.

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Schedule M (Form 990-T) 2019



ATTACHMENT 1FORM 990T - LINE 5 -INCOME (LOSS) FROM PARTNERSHIPS OR S CORPORATIONS

AG SUPER FUND, LP	-17,276.
AMBERBROOK VI, LLC	13,747.
CORDILLERA INVESTMENT FUND I, LP	289.
DAVIDSON KEMPNER	3,131.
ENERGY & MINERALS GROUP FUND II, LP	840,716.
ENR PARTNERS LP	-233,517.
ENR PARTNERS II, LP	-1,837,645.
EURO CHOICE V LP	1,330.
HARVEST MLP INCOME FUND LLC	58,819.
IRON POINT REAL ESTATE PARTNERS II-TE, LP	-38,425.
IRON POINT REAL ESTATE PARTNERS III, LP	-171,052.
KAYNE ANDERSON ENERGY FUND VI, LP	490,374.
MAIN POST GROWTH	-13,243.
MSOUTH EQUITY PARTNERS IV LP	-1,777.
MERIT MEZZANINE FUND VI, LP	122,146.
MSOUTH EQUITY PARTNERS III LP	-199.
MILESTONE PARTNERS IV	18.
NEWBURY EQUITY PARTNERS II, LP	16,755.
OAKTREE PRINCIPAL FUND V, AIF L.P.	-29,362.
ORBIMED ROYALTY	-30,364.
PANGAEA TWO LP	-12,681.
NEW HARBOR CAPITAL FUND, LP	-499,790.
MILESTONE PARTNERS IV AIV LP	-336.
NEW HARBOR CAPITAL FUND II, LP	-304,472.
RESOURCE LAND FUND IV, LLC	-348,840.
RESOURCE LAND FUND V, LLC	-137,163.
ROCKLAND POWER PARTNERS LP	632,862.
ROCKLAND POWER PARTNERS II, LP	482,601.
ROCKLAND POWER PARTNERS III, LP	3,026,140.
SHOREHILL PRIVATE EQUITY LP	5,058.
SINGERMAND REAL ESTATE OPPORTUNITY FUND I	-23,927.
SRE OPPORTUNITY FUND II, LP	130,137.
SRE OPPORTUNITY FUND III, LP	46,521.
VARDE FUND X(B) (FEEDER), LP	-19,107.
VARDE FUND XI(B) (FEEDER), LP	-35,302.
WCP REAL ESTATE FUND III	-131,154.
WCP REAL ESTATE FUND IV	-268,499.
GCG INVESTORS IV LP	587,738.
INCOME (LOSS) FROM PARTNERSHIPS	<u>2,304,251.</u>

ATTACHMENT 2

FORM 990T - PART II - LINE 27 - TOTAL OTHER DEDUCTIONS

OTHER PASSTHROUGH DEDUCTIONS	2,319,949.
TAX PREPARATION FEES	11,600.

PART II - LINE 27 - OTHER DEDUCTIONS	<u>2,331,549.</u>
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ATTACHMENT 3SCHD. K, FORM 990-T, COMPENSATION OF OFFICERS, DIRECTORS, & TRUSTEES

<u>NAME AND ADDRESS</u>	<u>TITLE</u>	<u>BUSINESS PERCENT</u>	<u>COMPENSATION</u>
DALE E BAKER P.O. BOX 4550 IOWA CITY, IA 52244-4550	DIRECTOR	0	0.
P SUE BECKWITH, M.D. P.O. BOX 4550 IOWA CITY, IA 52244-4550	DIRECTOR	0	0.
JAMES W CARNEY P.O. BOX 4550 IOWA CITY, IA 52244-4550	DIRECTOR	0	0.
ANDREW W CODE P.O. BOX 4550 IOWA CITY, IA 52244-4550	DIRECTOR	0	0.
KATHLEEN A DORE P.O. BOX 4550 IOWA CITY, IA 52244-4550	VICE CHAIR/DIRECTOR	0	0.
JANICE R ELLIG P.O. BOX 4550 IOWA CITY, IA 52244-4550	CHAIR/DIRECTOR	0	0.
DAVID J FISHER P.O. BOX 4550 IOWA CITY, IA 52244-4550	DIRECTOR	0	0.
CASSANDRA S FOENS, M.D. P.O. BOX 4550 IOWA CITY, IA 52244-4550	DIRECTOR	0	0.
NOLDEN GENTRY P.O. BOX 4550 IOWA CITY, IA 52244-4550	DIRECTOR	0	0.
PERRY A GLASSGOW P.O. BOX 4550 IOWA CITY, IA 52244-4550	DIRECTOR	0	0.

ATTACHMENT 3 (CONT'D)SCHD. K, FORM 990-T, COMPENSATION OF OFFICERS, DIRECTORS, & TRUSTEES

<u>NAME AND ADDRESS</u>	<u>TITLE</u>	<u>BUSINESS PERCENT</u>	<u>COMPENSATION</u>
KEVIN R GRUNEICH P.O. BOX 4550 IOWA CITY, IA 52244-4550	DIRECTOR	0	0.
LEONARD A HADLEY P.O. BOX 4550 IOWA CITY, IA 52244-4550	DIRECTOR	0	0.
THOMAS R HANSON P.O. BOX 4550 IOWA CITY, IA 52244-4550	DIRECTOR	0	0.
J BRUCE HARRELD P.O. BOX 4550 IOWA CITY, IA 52244-4550	DIRECTOR	0	0.
CAROL HAVEMANN-LYNCH P.O. BOX 4550 IOWA CITY, IA 52244-4550	DIRECTOR	0	0.
MIEKELEEN HART P.O. BOX 4550 IOWA CITY, IA 52244-4550	DIRECTOR	0	0.
DAVID A HOAK P.O. BOX 4550 IOWA CITY, IA 52244-4550	DIRECTOR	0	0.
CURTIS K LANE P.O. BOX 4550 IOWA CITY, IA 52244-4550	DIRECTOR	0	0.
KATHERINE A PETERSEN LINDER P.O. BOX 4550 IOWA CITY, IA 52244-4550	DIRECTOR	0	0.
CASEY D MAHON P.O. BOX 4550 IOWA CITY, IA 52244-4550	DIRECTOR	0	0.

SCHD. K, FORM 990-T, COMPENSATION OF OFFICERS, DIRECTORS, & TRUSTEES

<u>NAME AND ADDRESS</u>	<u>TITLE</u>	<u>BUSINESS PERCENT</u>	<u>COMPENSATION</u>
BARBARA A MCKENZIE P.O. BOX 4550 IOWA CITY, IA 52244-4550	DIRECTOR	0	0.
BRUCE E RINGDAHL P.O. BOX 4550 IOWA CITY, IA 52244-4550	DIRECTOR	0	0.
DYAN C SMITH P.O. BOX 4550 IOWA CITY, IA 52244-4550	DIRECTOR	0	0.
MARY JOY STEAD P.O. BOX 4550 IOWA CITY, IA 52244-4550	DIRECTOR	0	0.
CARL W STUART P.O. BOX 4550 IOWA CITY, IA 52244-4550	DIRECTOR	0	0.
GREGS G THOMOPULOS P.O. BOX 4550 IOWA CITY, IA 52244-4550	DIRECTOR	0	0.
NATHAN R TROSS P.O. BOX 4550 IOWA CITY, IA 52244-4550	DIRECTOR	0	0.
THOMAS J VEALE P.O. BOX 4550 IOWA CITY, IA 52244-4550	DIRECTOR	0	0.
CATHERINE ZAHARIS P.O. BOX 4550 IOWA CITY, IA 52244-4550	DIRECTOR	0	0.
LYNETTE L MARSHALL P.O. BOX 4550 IOWA CITY, IA 52244-4550	PRESIDENT	0	0.

ATTACHMENT 3 (CONT'D)SCHD. K, FORM 990-T, COMPENSATION OF OFFICERS, DIRECTORS, & TRUSTEES

<u>NAME AND ADDRESS</u>	<u>TITLE</u>	<u>BUSINESS PERCENT</u>	<u>COMPENSATION</u>
TIFFANI K SHAW P.O. BOX 4550 IOWA CITY, IA 52244-4550	VP/ASST SECRETARY	0	0.
SHERRI P FURMAN P.O. BOX 4550 IOWA CITY, IA 52244-4550	CFO/TREASURER	0	0.
DIANE K BROWNLEE P.O. BOX 4550 IOWA CITY, IA 52244-4550	SECRETARY	0	0.
CHRISTOPHER D. DEWOLF P.O. BOX 4550 IOWA CITY, IA 52244-4550	DIRECTOR	0	0.
MARK A. KAUFMAN P.O. BOX 4550 IOWA CITY, IA 52244-4550	DIRECTOR	0	0.
SHEILA BALDWIN P.O. BOX 4550 IOWA CITY, IA 52244-4550	VP HEALTH SCIENCES DEVELOPMENT	0	0.
ERIN LEWIS P.O. BOX 4550 IOWA CITY, IA 52244-4550	VP ALUMNI AND DONOR ENGAGEMENT	0	0.
ROBERT K. CLARK P.O. BOX 4550 IOWA CITY, IA 52244-4550	VP MAIN CAMPUS DEVELOPMENT	0	0.
TOTAL COMPENSATION			<u>0.</u>

FORM 990T - PART II LINE 27 TOTAL OTHER DEDUCTIONS

TRAVEL	6,099.
CONSULTING FEES	4,500.
POSTAGE	1,127.

DOMESTIC PRODUCTION ACTIVITIES DEDUCTION (DPAD)

PART II - LINE 27 - OTHER DEDUCTIONS

11,726.

ATTACHMENT 5

SCHEDULE M - SCHEDULE J ADVERTISING INCOME REPORTED ON A SEPARATE BASIS

<u>1</u> NAME OF PERIODICAL	<u>2</u> GROSS ADVERTISING INCOME	<u>3</u> DIRECT ADVERTISING COSTS	<u>4</u> ADVERTISING GAIN OR LOSS	<u>5</u> CIRCULATION INCOME	<u>6</u> READERSHIP COSTS	<u>7</u> EXCESS READERSHIP COSTS
IOWA ALUMNI MAGAZINE	36,100	71,799				
	<u>36,100</u>	<u>71,799</u>	<u>-35,699</u>			
	<u>36,100</u>	<u>71,799</u>				



**SCHEDULE D  
(Form 1120)**

Department of the Treasury  
Internal Revenue Service

**Capital Gains and Losses**

▶ Attach to Form 1120, 1120-C, 1120-F, 1120-FSC, 1120-H, 1120-IC-DISC, 1120-L, 1120-ND, 1120-PC, 1120-POL, 1120-REIT, 1120-RIC, 1120-SF, or certain Forms 990-T

▶ Go to [www.irs.gov/Form1120](http://www.irs.gov/Form1120) for instructions and the latest information

OMB No 1545-0123

**2019**

Name **STATE UNIVERSITY OF IOWA FOUNDATION** Employer identification number **42-0796760**

Did the corporation dispose of any investment(s) in a qualified opportunity fund during the tax year?  Yes  No

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

**Part I Short-Term Capital Gains and Losses (See instructions)**

See instructions for how to figure the amounts to enter on the lines below This form may be easier to complete if you round off cents to whole dollars	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part I, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
<b>1a</b> Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions) However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 1b . . . . .				
<b>1b</b> Totals for all transactions reported on Form(s) 8949 with <b>Box A</b> checked . . . . .				
<b>2</b> Totals for all transactions reported on Form(s) 8949 with <b>Box B</b> checked . . . . .				
<b>3</b> Totals for all transactions reported on Form(s) 8949 with <b>Box C</b> checked . . . . .	34,165.			34,165.
<b>4</b> Short-term capital gain from installment sales from Form 6252, line 26 or 37 . . . . .				<b>4</b>
<b>5</b> Short-term capital gain or (loss) from like-kind exchanges from Form 8824 . . . . .				<b>5</b>
<b>6</b> Unused capital loss carryover (attach computation) . . . . .				<b>6</b> ( )
<b>7</b> Net short-term capital gain or (loss) Combine lines 1a through 6 in column h . . . . .				<b>7</b> 34,165.

**Part II Long-Term Capital Gains and Losses (See instructions)**

See instructions for how to figure the amounts to enter on the lines below This form may be easier to complete if you round off cents to whole dollars	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to gain or loss from Form(s) 8949, Part II, line 2, column (g)	(h) Gain or (loss) Subtract column (e) from column (d) and combine the result with column (g)
<b>8a</b> Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions) However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b . . . . .				
<b>8b</b> Totals for all transactions reported on Form(s) 8949 with <b>Box D</b> checked . . . . .				
<b>9</b> Totals for all transactions reported on Form(s) 8949 with <b>Box E</b> checked . . . . .				
<b>10</b> Totals for all transactions reported on Form(s) 8949 with <b>Box F</b> checked . . . . .	106,289.			106,289.
<b>11</b> Enter gain from Form 4797, line 7 or 9 . . . . .				<b>11</b> 2,510,835.
<b>12</b> Long-term capital gain from installment sales from Form 6252, line 26 or 37 . . . . .				<b>12</b>
<b>13</b> Long-term capital gain or (loss) from like-kind exchanges from Form 8824 . . . . .				<b>13</b>
<b>14</b> Capital gain distributions (see instructions) . . . . .				<b>14</b>
<b>15</b> Net long-term capital gain or (loss) Combine lines 8a through 14 in column h . . . . .				<b>15</b> 2,617,124.

**Part III Summary of Parts I and II**

<b>16</b> Enter excess of net short-term capital gain (line 7) over net long-term capital loss (line 15) . . . . .	<b>16</b>	34,165.
<b>17</b> Net capital gain Enter excess of net long-term capital gain (line 15) over net short-term capital loss (line 7) . . . . .	<b>17</b>	2,617,124.
<b>18</b> Add lines 16 and 17 Enter here and on Form 1120, page 1, line 8, or the proper line on other returns . . . . .	<b>18</b>	2,651,289.

Note If losses exceed gains, see *Capital Losses* in the instructions

For Paperwork Reduction Act Notice, see the Instructions for Form 1120

Schedule D (Form 1120) 2019

JSA  
9E1801 1 000





State University of Iowa Foundation  
 DBA Univ of Iowa Center for Advancement  
 Form 990-T, Line 36 - Net Operating Loss Deduction  
 6/30/2020

EIN: 42-0796760

**NET OPERATING LOSS CARRYFORWARD TAX YEARS BEFORE JANUARY 1, 2018**

Loss Year Ending	NOL Generated	Loss Previously Utilized	Loss Available
6/30/2014	(1,513,217)	1,505,272	(7,945)
6/30/2015	(1,712,327)		(1,712,327)
6/30/2017	(1,050,147)		(1,050,147)
6/30/2018	(2,341,601)		(2,341,601)
6/30/2019	-		-
6/30/2020	-		-
Net Operating Loss Available			(5,112,020)
Net Operating Loss Deduction (Limited to Taxable Income) - 6/30/2020			2,026,181
Net Operating Loss Carryforward to 6/30/2021			(3,085,839)

**NET OPERATING LOSS CARRYFORWARD TAX YEARS AFTER JANUARY 1, 2018**

Activity Magazine Advertising

Loss Year Ending	NOL Generated	Loss Previously Utilized	Loss Available
6/30/2020	(35,699)	-	(35,699)
Net Operating Loss Available	(35,699)	-	(35,699)
Net Operating Loss Deduction (Limited to Taxable Income) - 6/30/2020			
Net Operating Loss Carryforward to 6/30/2021			(35,699)