

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

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For calendar year 2022, or tax year beginning 07-01-2022, and ending 06-30-2023

Name of foundation: ROBERT SCHALKENBACH FOUNDATION INC. A Employer identification number: 13-1656331. B Telephone number: (973) 434-0005. C If exemption application is pending, check here. D 1. Foreign organizations, check here. 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. H Check type of organization: Section 501(c)(3) exempt private foundation. J Accounting method: Accrual.

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)

Table with 5 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes. Rows include: 1 Contributions, gifts, grants, etc., received; 2 Check if the foundation is not required to attach Sch. B; 3 Interest on savings and temporary cash investments; 4 Dividends and interest from securities; 5a Gross rents; 5b Net rental income or (loss); 6a Net gain or (loss) from sale of assets not on line 10; 6b Gross sales price for all assets on line 6a; 7 Capital gain net income; 8 Net short-term capital gain; 9 Income modifications; 10a Gross sales less returns and allowances; 10b Less: Cost of goods sold; 10c Gross profit or (loss); 11 Other income; 12 Total. Add lines 1 through 11; 13 Compensation of officers, directors, trustees, etc.; 14 Other employee salaries and wages; 15 Pension plans, employee benefits; 16a Legal fees; 16b Accounting fees; 16c Other professional fees; 17 Interest; 18 Taxes; 19 Depreciation and depletion; 20 Occupancy; 21 Travel, conferences, and meetings; 22 Printing and publications; 23 Other expenses; 24 Total operating and administrative expenses; 25 Contributions, gifts, grants paid; 26 Total expenses and disbursements; 27 Subtract line 26 from line 12; a Excess of revenue over expenses and disbursements; b Net investment income; c Adjusted net income.

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	64,613	66,457	66,457
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶ <u>3,026</u>			
	Less: allowance for doubtful accounts ▶ _____	14,321	3,026	3,026
	4 Pledges receivable ▶ _____			
	Less: allowance for doubtful accounts ▶ _____			
	5 Grants receivable		17,928	17,928
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ _____			
	Less: allowance for doubtful accounts ▶ _____	75,000	0	0
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	8,236	42,235	42,235
	10a Investments—U.S. and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)			
	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)	12,473,757	13,276,544	13,276,544	
14 Land, buildings, and equipment: basis ▶ <u>28,631</u>				
Less: accumulated depreciation (attach schedule) ▶ <u>14,954</u>	13,882	13,677	13,677	
15 Other assets (describe ▶ _____)	5,545,303	5,775,270	5,775,270	
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	18,195,112	19,195,137	19,195,137	
Liabilities	17 Accounts payable and accrued expenses	101,662	57,155	
	18 Grants payable	25,000	92,500	
	19 Deferred revenue.			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶ _____)	0	69,453	
	23 Total liabilities (add lines 17 through 22)	126,662	219,108	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here <input checked="" type="checkbox"/> and complete lines 24, 25, 29 and 30.			
	24 Net assets without donor restrictions	12,528,847	13,274,571	
	25 Net assets with donor restrictions	5,539,603	5,701,458	
	Foundations that do not follow FASB ASC 958, check here <input type="checkbox"/> and complete lines 26 through 30.			
	26 Capital stock, trust principal, or current funds			
	27 Paid-in or capital surplus, or land, bldg., and equipment fund			
	28 Retained earnings, accumulated income, endowment, or other funds			
29 Total net assets or fund balances (see instructions)	18,068,450	18,976,029		
30 Total liabilities and net assets/fund balances (see instructions)	18,195,112	19,195,137		

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	18,068,450
2 Enter amount from Part I, line 27a	2	-168,020
3 Other increases not included in line 2 (itemize) ▶ _____	3	1,075,599
4 Add lines 1, 2, and 3	4	18,976,029
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	18,976,029

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			
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 750,860		657,613	93,247
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(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	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
a			93,247
b			
c			
d			
e			

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	93,247
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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	0
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Part V 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-rows 6a-6d for credits and payments. Total tax due is 78, overpayment is 3,942.

Part VI-A Statements Regarding Activities

Table with 10 rows for activity statements. Columns include question number, 'Yes', and 'No' responses. Includes questions about political activities, unrelated business income, and state reporting.

Part VI-A Statements Regarding Activities (continued)

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.
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
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address WWW.SCHALKENBACH.ORG
14 The books are in care of JOSEPHINE FAASS Telephone no. (973) 434-0005 Located at 407 NASSAU STREET PRINCETON NJ ZIP+4 08540
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. 15
16 At any time during calendar year 2022, 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

Part VI-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.

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?
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?
(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)?
(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.)
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
c Organizations relying on a current notice regarding disaster assistance check here.
d 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 2022?
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 2022, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2022?. If "Yes," list the years 20, 20, 20, 20
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement-see instructions.)
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. 20, 20, 20, 20
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?
b If "Yes," did it have excess business holdings in 2022 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 Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2022.)
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?
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 2022?

Part VI-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** Organizations relying on a current notice regarding disaster assistance check
- d** 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?
If "Yes," attach the statement required by Regulations section 53.4945–5(d).
- 6a** Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?
- b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?
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?
- b** 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?

	Yes	No
5a(1)	<input type="checkbox"/>	<input type="checkbox"/>
5a(2)	<input type="checkbox"/>	<input type="checkbox"/>
5a(3)	<input type="checkbox"/>	<input type="checkbox"/>
5a(4)	<input type="checkbox"/>	<input type="checkbox"/>
5a(5)	<input type="checkbox"/>	<input type="checkbox"/>
5b	<input type="checkbox"/>	<input type="checkbox"/>
5d	<input type="checkbox"/>	<input type="checkbox"/>
6a	<input type="checkbox"/>	<input type="checkbox"/>
6b	<input type="checkbox"/>	<input type="checkbox"/>
7a	<input type="checkbox"/>	<input type="checkbox"/>
7b	<input type="checkbox"/>	<input type="checkbox"/>
8	<input type="checkbox"/>	<input type="checkbox"/>

Part VII 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

(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
LEE HACHADOORIAN 407 NASSAU STREET PRINCETON, NJ 08540	PRESIDENT 9.00	0	0	0
MATTHEW DOWNHOUR 407 NASSAU STREET PRINCETON, NJ 08540	VICE PRESIDENT 1.50	0	0	0
WYN ACHENBAUM 407 NASSAU STREET PRINCETON, NJ 08540	TREASURER 1.50	0	0	0
MATT LEICHTER 407 NASSAU STREET PRINCETON, NJ 08540	SECRETARY 1.50	0	0	0
JOHN BECK 407 NASSAU STREET PRINCETON, NJ 08540	EXECUTIVE COMMITTEE 1.50	0	0	0
KRIS FEDER 407 NASSAU STREET PRINCETON, NJ 08540	EXECUTIVE COMMITTEE 1.50	0	0	0
MARK MOLLINEAUX 407 NASSAU STREET PRINCETON, NJ 08540	EXECUTIVE COMMITTEE 1.50	0	0	0
BILL BATT 407 NASSAU STREET PRINCETON, NJ 08540	DIRECTOR 1.00	0	0	0
CHRISTOPHER ENGLAND 407 NASSAU STREET PRINCETON, NJ 08540	DIRECTOR 1.00	0	0	0
FRANK DE JONG 407 NASSAU STREET PRINCETON, NJ 08540	DIRECTOR 1.00	0	0	0
GABRIEL NAGY 407 NASSAU STREET PRINCETON, NJ 08540	DIRECTOR 1.00	0	0	0
JEREMY LUCAS 407 NASSAU STREET PRINCETON, NJ 08540	DIRECTOR 1.00	0	0	0
JOHN HOOKER 407 NASSAU STREET PRINCETON, NJ 08540	DIRECTOR 1.00	0	0	0
LARK LO SONTAG 407 NASSAU STREET PRINCETON, NJ 08540	DIRECTOR 1.00	0	0	0
MANU DELGADO-MEDRANO 407 NASSAU STREET PRINCETON, NJ 08540	DIRECTOR 1.00	0	0	0
MIHALI FELIPE 407 NASSAU STREET PRINCETON, NJ 08540	DIRECTOR 1.00	0	0	0
NIA JOHNSON 407 NASSAU STREET	DIRECTOR 1.00	0	0	0

(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
PRINCETON, NJ 08540				
RICH NYMOEN 407 NASSAU STREET PRINCETON, NJ 08540	DIRECTOR 1.00	0	0	0
RICHARD PEREIRA 407 NASSAU STREET PRINCETON, NJ 08540	DIRECTOR 1.00	0	0	0
STEVE SKLAR 407 NASSAU STREET PRINCETON, NJ 08540	DIRECTOR 1.00	0	0	0
VICTOR RAMIREZ 407 NASSAU STREET PRINCETON, NJ 08540	DIRECTOR 1.00	0	0	0
JOSEPHINE FAASS 407 NASSAU STREET PRINCETON, NJ 08540	EXECUTIVE DIRECTOR 40.00	155,856	22,186	0

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
STEPHANIE CULLINS 407 NASSAU STREET PRINCETON, NJ 08540	EXTERNAL AFFAIRS DIR 40.00	81,826	12,728	0
GAYLE LAMBERT 407 NASSAU STREET PRINCETON, NJ 08540	OPERATIONS & FINANCE 40.00	55,328	9,778	0

Total number of other employees paid over \$50,000. ▶ 0

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

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

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

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

0

Part VIII- 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 THE FOUNDATION CONDUCTS EDUCATION AND OUTREACH ACTIVITIES TO PROMOTE THE SOCIAL AND ECONOMIC THEORY OF HENRY GEORGE AND OTHER RELATED ECONOMISTS.	203,595
2 THE FOUNDATION PROMOTES THE SOCIAL AND ECONOMIC PHILOSOPHY OF HENRY GEORGE AND OTHER RELATED ECONOMISTS BY CONTRACTING THE SERVICES OF SCHOLARS, WRITERS AND OTHERS FOR PUBLISHING, RESEARCH AND OUTREACH PROJECTS. THE FOUNDATION ALSO UNDERTAKES INDEPENDENT RESEARCH FOR THIS MISSION.	153,445
3 THE FOUNDATION OFFERS SCHOLARSHIPS TO SELECTED UNDERGRADUATE COLLEGE, AND GRADUATE SCHOOL, STUDENTS IN FIELDS OF STUDY RELATED TO THE FOUNDATION'S MISSION.	153,742
4 THE FOUNDATION MAINTAINS A LIBRARY OF PUBLICATIONS RELATED TO ITS MISSION.	112,432

Part VIII- Summary of Program-Related Investments (see instructions)

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

Part IX 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	12,664,965
b	Average of monthly cash balances.	1b	91,382
c	Fair market value of all other assets (see instructions).	1c	119,073
d	Total (add lines 1a, b, and c).	1d	12,875,420
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	12,875,420
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions).	4	193,131
5	Net value of noncharitable-use assets. Subtract line 4 from line 3.. . . .	5	12,682,289
6	Minimum investment return. Enter 5% (0.05) of line 5.	6	634,114

Part X 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 IX, line 6.	1	
2a	Tax on investment income for 2022 from Part V, line 5.	2a	
b	Income tax for 2022. (This does not include the tax from Part V.).	2b	
c	Add lines 2a and 2b.	2c	
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1.	7	

Part XI 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	810,511
b	Program-related investments—total from Part VIII-B	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	4,548
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 XII, line 4.. . . .	4	815,059

Part XII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2021	(c) 2021	(d) 2022
1 Distributable amount for 2022 from Part X, line 7				
2 Undistributed income, if any, as of the end of 2022:				
a Enter amount for 2021 only.				
b Total for prior years: 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2022:				
a From 2017.				
b From 2018.				
c From 2019.				
d From 2020.				
e From 2021.				
f Total of lines 3a through e.				
4 Qualifying distributions for 2022 from Part XI, line 4: ▶ \$ _____				
a Applied to 2021, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2022 distributable amount				
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2022. (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
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 2021. Subtract line 4a from line 2a. Taxable amount—see instructions.				
f Undistributed income for 2022. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2023				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).				
8 Excess distributions carryover from 2017 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2023. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9:				
a Excess from 2018				
b Excess from 2019				
c Excess from 2020.				
d Excess from 2021				
e Excess from 2022				

Part XIII Private Operating Foundations (see instructions and Part VI-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 2022, 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)

Table with columns: Tax year, (a) 2022, (b) 2021, (c) 2020, (d) 2019, (e) Total. Rows include: 2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part IX for each year listed; b 85% (0.85) of line 2a; c Qualifying distributions from Part XI, 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; b "Endowment" alternative test; c "Support" alternative test.

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

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

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

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

a The name, address, and telephone number or email address of the person to whom applications should be addressed:

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 **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> ARIZONA STATE UNIVERSITY FOUNDATION 300 E UNIVERSITY DR 2061 TEMPE,AZ 85281	N/A	P C	SUPPORT RESEARCH PROJECT	5,000
CHAPMAN UNIVERSITY BHATHAL STUDENT CENTER 150 W SYCAMORE ORANGE,CA 92866	N/A	P C	SUPPORT RESEARCH PROJECT	5,000
RAND CORPORATION 1776 MAIN STREET SANTA MONICA,CA 90407	N/A	P C	SUPPORT RESEARCH PROJECT	5,000
TRUSTEES OF TUFTS COLLEGE INC 150 HARRISON AVE BOSTON,MA 02111	N/A	P C	SUPPORT RESEARCH PROJECT	35,000
UNIVERSITY OF CHICAGO 5801 S ELLIS AVE CHICAGO,IL 60637	N/A	P C	SUPPORT RESEARCH PROJECT	3,750
UNIVERSITY OF MARYLAND - COLLEGE PARK 3112 LEE BUILDING 7809 REGENTS DRIVE COLLEGE PARK,MD 20742	N/A	P C	SUPPORT RESEARCH PROJECT	4,992
UNIVERSITY OF PENNSYLVANIA RESEARCH SUPPORT CENTER DUHRING WING 412 236 S 34TH ST PHILADELPHIA,PA 191046311	N/A	P C	SUPPORT RESEARCH PROJECT	2,500
SCHOLARSHIPS AMERICA INC 7900 INTERNATIONAL DRIVE SUITE 500 MINNEAPOLIS,MN 55425	N/A	P C	PROGRESS OF IDEAS SCHOLARSHIP PROGRAM	25,000
Total				86,242
b <i>Approved for future payment</i> SCHOLARSHIPS AMERICA INC 7900 INTERNATIONAL DRIVE SUITE 500 MINNEAPOLIS,MN 55425	N/A	P C	PROGRESS OF IDEAS SCHOLARSHIP PROGRAM	42,500
TRUSTEES OF TUFTS COLLEGE INC 150 HARRISON AVE BOSTON,MA 02111	N/A	P C	SUPPORT RESEARCH PROJECT	50,000
Total				92,500

Part XV-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

- 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
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
8 Gain or (loss) from sales of assets other than inventory
9 Net income or (loss) from special events:
10 Gross profit or (loss) from sales of inventory
11 Other revenue:
a MISCELLANEOUS REVENUE
b
c
d
e

Table with 5 columns: (a) Business code, (b) Amount, (c) Exclusion code, (d) Amount, (e) Related or exempt function income. Includes rows for various income categories and a total row at the bottom.

12 Subtotal. Add columns (b), (d), and (e).
13 Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calculations.)

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

Table with 2 columns: Line No., Explain below how each activity for which income is reported in column (e) of Part XV-A contributed importantly to the accomplishment of the foundation's exempt purposes.

Additional Data

Return to Form

Software ID:

Software Version:

Form 990PF - Special Condition Description:

Special Condition Description

Schedule B

Schedule of Contributors

OMB No. 1545-0047

(Form 990)
Department of the Treasury
Internal Revenue Service

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

2022

Name of the organization ROBERT SCHALKENBACH FOUNDATION INC	Employer identification number 13-1656331
--	---

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
 ROBERT SCHALKENBACH FOUNDATION INC

Employer identification number
 13-1656331

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	NEILSON TRUST FUND B <hr/> C/O JP MORGAN TRUST 10 S DEARBORN <hr/> CHICAGO, IL 60603	<hr/> \$ 161,502	<input checked="" type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
2	NEILSON TRUST FUND A <hr/> C/O JP MORGAN TRUST 10 S DEARBORN <hr/> CHICAGO, IL 60603	<hr/> \$ 119,948	<input checked="" type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
3	DANICA FOUNDATION <hr/> 20 WEST 72ND STREET SUITE 506 <hr/> NEW YORK, NY 10023	<hr/> \$ 42,120	<input checked="" type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-	<hr/> <hr/> <hr/>	<hr/> \$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-	<hr/> <hr/> <hr/>	<hr/> \$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)
-	<hr/> <hr/> <hr/>	<hr/> \$	<input type="checkbox"/> Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash (Complete Part II for noncash contributions.)

Name of organization
ROBERT SCHALKENBACH FOUNDATION INC

Employer identification number

13-1656331

Part II **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____
-	_____ _____ _____	_____ \$	_____

Name of organization
ROBERT SCHALKENBACH FOUNDATION INC

Employer identification number

13-1656331

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	
_____		_____	
_____		_____	

Additional Data

Return to Form

Software ID:

Software Version:

TY 2022 IRS 990 e-File Render

Name: ROBERT SCHALKENBACH FOUNDATION INC

EIN: 13-1656331

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	18,500	954	954	16,597

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2022 IRS 990 e-File Render

Name: ROBERT SCHALKENBACH FOUNDATION INC

EIN: 13-1656331

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
OFFICE FURNITURE, COMPUTERS, AND EQUIPMENT		28,631	10,201	SL	5.000000000000	4,753	0	0	

TY 2022 IRS 990 e-File Render**Name:** ROBERT SCHALKENBACH FOUNDATION INC**EIN:** 13-1656331

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
VANGUARD HIGH YIELD CORP FUND ADM VWEAX	FMV	262,357	262,357
VANGUARD INTER-TERM INVEST-GR ADM VFIDX	FMV	348,683	348,683
VANGUARD LONG-TERM INVEST-GR ADM VWETX	FMV	387,778	387,778
VANGUARD SHORT-TERM INVEST-GR ADM VFSUX	FMV	852,452	852,452
VANGUARD TOTAL INT'L BOND IX ADM VTABX	FMV	1,270,176	1,270,176
VANGUARD TOTAL INT'L STOCK IX ADM VTIAX	FMV	3,437,577	3,437,577
VANGUARD TOTAL BOND MKT INDEX ADM VBTLX	FMV	1,579,884	1,579,884
VANGUARD TOTAL STOCK MKT IDX INST VITSX	FMV	5,137,637	5,137,637

TY 2022 IRS 990 e-File Render**Name:** ROBERT SCHALKENBACH FOUNDATION INC**EIN:** 13-1656331

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
OFFICE FURNITURE, COMPUTERS, AND EQUIPMENT	28,631	14,954	13,677	

TY 2022 IRS 990 e-File Render

Name: ROBERT SCHALKENBACH FOUNDATION INC

EIN: 13-1656331

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	2,733	141	141	2,592

TY 2022 IRS 990 e-File Render

Name: ROBERT SCHALKENBACH FOUNDATION INC

EIN: 13-1656331

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
INTEREST IN CHARITABLE REMAINDER TRUST	5,539,603	5,701,458	5,701,458
SECURITY DEPOSITS	5,700	6,213	6,213
OPERATING LEASE RIGHT-OF-USE ASSET		67,599	67,599

TY 2022 IRS 990 e-File Render

Name: ROBERT SCHALKENBACH FOUNDATION INC

EIN: 13-1656331

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TELEPHONE	16,133	435	435	15,138
SUPPLIES	5,355	74	74	5,523
OUTREACH	38,010	0	0	38,010
OFFICE EXPENSES	6,150	85	85	6,065
INSURANCE	9,207	128	128	10,256
POSTAGE & DELIVERY	659	9	9	681
MISCELLANEOUS EXPENSES	34,622	1,005	1,005	34,216

TY 2022 IRS 990 e-File Render

Name: ROBERT SCHALKENBACH FOUNDATION INC

EIN: 13-1656331

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
MISCELLANEOUS REVENUE	1,026		1,026

TY 2022 IRS 990 e-File Render**Name:** ROBERT SCHALKENBACH FOUNDATION INC**EIN:** 13-1656331

Description	Amount
UNREALIZED GAIN ON INVESTMENTS	855,802
CHANGE IN VALUE OF INTEREST IN CHARITABLE REMAINDER TRUST	161,855
PERIODIC PENSION RELATED CHANGES OTHER THAN PERIODIC PENSION CREDIT	57,942

TY 2022 IRS 990 e-File Render

Name: ROBERT SCHALKENBACH FOUNDATION INC

EIN: 13-1656331

Description	Beginning of Year - Book Value	End of Year - Book Value
OPERATING LEASE LIABILITY	0	69,453

TY 2022 IRS 990 e-File Render

Name: ROBERT SCHALKENBACH FOUNDATION INC

EIN: 13-1656331

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MANAGEMENT	31,362	31,362	31,362	0
PENSION CONSULTANT	5,125	264	264	4,861
OTHER PROFESSIONAL FEES	97,491	0	0	94,842

TY 2022 IRS 990 e-File Render

Name: ROBERT SCHALKENBACH FOUNDATION INC

EIN: 13-1656331

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXCISE TAXES	6,339	0	0	0