Form **990-PF**Department of the Treasury

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. 1545-0047

2022

Open to Public Inspection

For calendar year 2022 or tax year beginning and ending A Employer identification number Name of foundation Susannah M. Swihart Charitable 01-0534479 Foundation Number and street (or P.O. box number if mail is not delivered to street address) B Telephone number 207-829-9231 16 Town Landing Road City or town, state or province, country, and ZIP or foreign postal code C If exemption application is pending, check here ... 04110 Cumberland Foreside, ME D 1. Foreign organizations, check here G Check all that apply: Initial return Initial return of a former public charity X Final return Amended return 2. Foreign organizations meeting the 85% test, check here and attach computation Address change Name change X Section 501(c)(3) exempt private foundation H Check type of organization: E If private foundation status was terminated Section 4947(a)(1) nonexempt charitable trust U Other taxable private foundation under section 507(b)(1)(A), check here ... I Fair market value of all assets at end of year J Accounting method: X Cash Accrual F If the foundation is in a 60-month termination, Other (specify) (from Part II, col. (c), line 16) under section 507(b)(1)(B), check here ... (Part I, column (d), must be on cash basis.) \$ Part I Analysis of Revenue and Expenses (c) Adjusted net (d) Disbursements (b) Net investment (a) Revenue and (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).) income expenses per books income 3,000. N/A Contributions, gifts, grants, etc., received 2 Check X if the foundation is not required to attach Sch. B Interest on savings and temporary cash investments Statement 3 43,016. 43,016 Statement Dividends and interest from securities 5a Gross rents **b** Net rental income or (loss) 31,673. 6a Net gain or (loss) from sale of assets not on line 10 b Gross sales price for all assets on line 6a 47,398. 31,673 7 Capital gain net income (from Part IV, line 2) Net short-term capital gain Income modifications ... 10a Gross sales less returns and allowances b Less: Cost of goods sold ... c Gross profit or (loss) 11 Other income 77,690. 74,690. Total. Add lines 1 through 11 12 0. 13 Compensation of officers, directors, trustees, etc. 14 Other employee salaries and wages 15 Pension plans, employee benefits Expenses 16a Legal fees b Accounting fees Stmt 3 3.000. 1,500. 1,500. c Other professional fees Stmt 4 109. 109. Administrative 17 Interest 3,022 934. Taxes Stmt 5 18 Depreciation and depletion 19 20 Occupancy 21 Travel, conferences, and meetings and 22 Printing and publications 23 Other expenses Operating 24 Total operating and administrative 2,543 1,500. expenses. Add lines 13 through 23 6,131 1,857,416. 857,416 25 Contributions, gifts, grants paid 26 Total expenses and disbursements. 2,543. 1,858,916. 1,863,547 Add lines 24 and 25 27 Subtract line 26 from line 12: -1,785,857a Excess of revenue over expenses and disbursements ... 72,147. b Net investment income (if negative, enter -0-) N/Ac Adjusted net income (if negative, enter -0-).

223501 12-06-22 LHA For Paperwork Reduction Act Notice, see instructions.

Form **990-PF** (2022)

Page 2

Castar non-interest-bearing 15,900.	П	ort	Balance Sheets Attached schedules and amounts in the description	Beginning of year	End o	f year
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Part IV Capital Gains a	nd Losses for Tax on I	nvestment Income					,
(a) List and describe the	ne kind(s) of property sold (for exa ehouse; or common stock, 200 sh	imple, real estate.	(b) How acquir P - Purchase D - Donation	ed (c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a Publicly Traded	Securities	10 0		P			
b					\top		
C			\neg				
d						***************************************	
6			\neg				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other bas plus expense of sale			. ((h) Gain or (los (e) plus (f) minus	
a 47,398.		15,	725.				31,673.
b			****				
C							
d							
е			***************************************				
Complete only for assets showing	gain in column (h) and owned by	the foundation on 12/31/69.			(1) (ains (Col. (h) gair	n minus
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any			col. (I	k), but not less tha Losses (from col.	ın -0-) or
a				1			31,673.
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2 Capital gain net income or (net capital gain or (loss) 1 Net short-term capital gain or (loss) 1 If gain, also enter in Part I, line 8, concept I, line 8 2 Part V Excise Tax Base	as defined in sections 1222(5) ar olumn (c). See instructions. If (los	nd (6): s), enter -0- in	4040	3	040	N/A	31,673.
					948 - 8	see instructi	ons)
1a Exempt operating foundations de						5	1 000
Date of ruling or determination let		tach copy of letter if necessa	ary - se	e instructior	is)	1	1,003.
b All other domestic foundations er							
2 Tax under section 511 (domestic	col. (b)				J		0
						2	1,003.
4 Subtitle A (income) tax (domestic	e section 4047(a)(1) trusts and toy	ahla faundationa anks athers				3	Ι,003.
5 Tax based on investment income	Subtract line 4 from line 2. If re	able loulidations only, others	s, enter	-U-)		4	1,003.
6 Credits/Payments:	e. Oubtract line 4 Hottl line 3. H Ze	10 01 1655, 611161 -0-				5	1,003.
a 2022 estimated tax payments and	1 2021 overnavment credited to 20	022 6a		1	400.		
b Exempt foreign organizations - tax					0.		
c Tax paid with application for exter	usion of time to file (Form 8868)	6c		****	0.		
d Backup withholding erroneously v					0.		
7 Total credits and payments. Add I						7	1,400.
8 Enter any penalty for underpayme	ent of estimated tax. Check here	if Form 2220 is attache	d	***************		8	0.
9 Tax due. If the total of lines 5 and						9	
10 Overpayment. If line 7 is more th			• • • • • • • • • •			10	397.
11 Enter the amount of line 10 to be:	Credited to 2023 estimated tax	own distribution of the Till and the		^	unded	11	397.
							Form 990-PF (2022)

Susannah	Μ.	Swihart	Charitable
Founda	atio	on	

Pa	rt VI-A Statements Regarding Activities			
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in		Yes	2
	any political campaign?	1a		X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition	1b		X
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or	71		
	distributed by the foundation in connection with the activities.			
C	Did the foundation file Form 1120-POL for this year?	10		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:			
	(1) On the foundation. \$ 0 . (2) On foundation managers. \$ 0 .			
е	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation			
	managers. \$0 .			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		<u>X</u>
	If "Yes," attach a detailed description of the activities.			
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or			37
	bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3		X
	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b	37	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? Stmt 6 Stmt 7	5	X	
	If "Yes," attach the statement required by General Instruction T.			4
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:			
	By language in the governing instrument, or			
	By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law		v	
	remain in the governing instrument?	6 7	X	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XIV		Λ	
	File the state of the foundation and the which it is undefined. One instructions			ĺ
88	Enter the states to which the foundation reports or with which it is registered. See instructions. ME			ĺ
	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate)			
L	of each state as required by General Instruction G? If "No," attach explanation	8b	х	l
0	10 40 (V/C) = 40	- 05		
9	year 2022 or the tax year beginning in 2022? See the instructions for Part XIII. If "Yes," complete Part XIII	9		Х
10		10		X
	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of	"		
1 1	section 512(b)(13)? If "Yes," attach schedule. See instructions	11		x
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges?	<u> </u>		
14	If "Yes," attach statement. See instructions See Statement 8 See Statement 9	12	Х	
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Х	
	Website address N/A			
14	The books are in care of Susannah M. Swihart Telephone no. 207-82			
	Located at 16 Town Landing Road, Cumberland Foreside, ME ZIP+4 04	110		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here			Ш
	and enter the amount of tax-exempt interest received or accrued during the year		/A	
16	At any time during calendar year 2022, did the foundation have an interest in or a signature or other authority over a bank,		Yes	
	securities, or other financial account in a foreign country?	16		X
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the			
	foreign country			-
	For	m 99	0-PF	(2022)

Foundation

Part VI-B	Statements Regarding Activities for Which Form 4720 May Be Required			
File For	m 4720 if any item is checked in the "Yes" column, unless an exception applies.		Yes	No
1a During th	e year, did the foundation (either directly or indirectly):			
(1) Enga	ge in the sale or exchange, or leasing of property with a disqualified person?	1a(1)		X
	ow money from, lend money to, or otherwise extend credit to (or accept it from)			- 4
a dis	qualified person?	1a(2)		х
(3) Furn	ish goods, services, or facilities to (or accept them from) a disqualified person?	1a(3)	Х	
	compensation to, or pay or reimburse the expenses of, a disqualified person?			Х
	sfer any income or assets to a disqualified person (or make any of either available	1000		
for t	ne benefit or use of a disqualified person)?	1a(5)		X
	e to pay money or property to a government official? (Exception. Check "No"	3.0		
if the	foundation agreed to make a grant to or to employ the official for a period after			
term	ination of government service, if terminating within 90 days.)	1a(6)		X
	ower is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations			
	3.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b		X
	ions relying on a current notice regarding disaster assistance, check here		- 1	
	undation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected			
before th	first day of the tax year beginning in 2022?	1d		X
2 Taxes on	failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation			
defined in	section 4942(j)(3) or 4942(j)(5)):	1 1		
	of tax year 2022, did the foundation have any undistributed income (Part XII, lines	1 1		
6d and 6	o) for tax year(s) beginning before 2022?	2a		X
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			
statemen	- see instructions.) N/A	2b		
c If the pro	risions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.			
-	undation hold more than a 2% direct or indirect interest in any business enterprise at any time			
		1 1		
during th	year?	3a		X
b If "Yes," d	id it have excess business holdings in 2022 as a result of (1) any purchase by the foundation or disqualified persons after			
May 26,	969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose	1 1		
	is acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Form 4720,			
	C, to determine if the foundation had excess business holdings in 2022.) N/A	3b		
	undation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
	undation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that			
had not b	een removed from jeopardy before the first day of the tax year beginning in 2022?	4b		X
	Fo	orm 990)-PF((2022)

Susannah M. Swihart Char	itable		01-0534	179		Page 6
Form 990-PF (2022) Foundation Part VI-B Statements Regarding Activities for Which I	Form 4720 May Be F			4//		ago O
5a During the year, did the foundation pay or incur any amount to:	on may be			-	Yes	No
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	n 4945(e))?			5a(1)		Х
(2) Influence the outcome of any specific public election (see section 4955); of				1		
any voter registration drive?				5a(2)		X
(3) Provide a grant to an individual for travel, study, or other similar purposes				5a(3)		X
(4) Provide a grant to an organization other than a charitable, etc., organizatio						
4945(d)(4)(A)? See instructions				5a(4)		X
(5) Provide for any purpose other than religious, charitable, scientific, literary,						
the prevention of cruelty to children or animals?				5a(5)		X
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify un	der the exceptions described i	n Regulations				
section 53.4945 or in a current notice regarding disaster assistance? See instr	uctions	,	N/A	5b		
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 f	rom the tax because it maintai	ned				
expenditure responsibility for the grant?			N/A	5d		
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			15		
a personal benefit contract?				6a		X
b Did the foundation, during the year, pay premiums, directly or indirectly, on a p	personal benefit contract?			6b		X
If "Yes" to 6b, file Form 8870.						
7a At any time during the tax year, was the foundation a party to a prohibited tax s				7a		X
b If "Yes," did the foundation receive any proceeds or have any net income attrib			N/A	7b		
8 Is the foundation subject to the section 4960 tax on payment(s) of more than 8	\$1,000,000 in remuneration or					
excess parachute payment(s) during the year?				8		X
Part VII Information About Officers, Directors, Trust Paid Employees, and Contractors		nagers, Highly	/			
1 List all officers, directors, trustees, and foundation managers and		(c) Compensation	(d) Cantributions	- T	(-) Evr	NODCO.
(a) Name and address	(b) Title, and average hours per week devoted to position	(If not paid, enter -0-)	(d) Contributions employee benefit pla and deferred compensation	ns a	(e) Exp ccount allowa	, other nces
Susannah M. Swihart	Trustee					
16 Town Landing Road			,			^
Cumberland Foreside, ME 04110	5.00	0.) •		0.
Abigail Armstrong	Trustee					
16 Town Landing Road	- 00		,			0
Cumberland Foreside, ME 04110	5.00	0.	() •		0.
	1					
				+		
	1					
	-					
2 Compensation of five highest-paid employees (other than those inc	cluded on line 1). If none.	enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions employee benefit pl and deferred	to ins a	(e) Exp account allowa	, other
NONE	dovoted to position		compensation	+		
TAOTATE	1					
				-		

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

Form 990-PF (2022) Foundation	01-0534479 Page 7
Part VII Information About Officers, Directors, Trustees, Foundation Managers, Highl Paid Employees, and Contractors (continued)	У
3 Five highest-paid independent contractors for professional services. If none, enter "NONE." (a) Name and address of each person paid more than \$50,000 (b) Type of services.	vice (c) Compensation
	VICE (C) Compensation
NONE	
Total number of others receiving over \$50,000 for professional services	C
Part VIII-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	Expenses
number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Ехрепзез
1N/A	
2	
3	
A	
4	
Part VIII-B Summary of Program-Related Investments	
Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
2	
All attended and related investments. Cas instructions	
All other program-related investments. See instructions.	
3	

0.

Total. Add lines 1 through 3

a Suitability test (prior IRS approval required)

b Cash distribution test (attach the required schedule)

01-0534479 Foundation Page 8 Form 990-PF (2022) Part IX Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.) Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: 1,600,199. 1a a Average monthly fair market value of securities 20,109. 1b b Average of monthly cash balances 10 c Fair market value of all other assets (see instructions) 1,620,308. 1d d Total (add lines 1a, b, and c) e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) le l Acquisition indebtedness applicable to line 1 assets 2 3 Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions) 4 1,596,003. 5 Net value of noncharitable-use assets. Subtract line 4 from line 3 79,800. Minimum investment return. Enter 5% (0.05) of line 5 Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain Part X foreign organizations, check here and do not complete this part.) 79,800. Minimum investment return from Part IX, line 6 1,003. Tax on investment income for 2022 from Part V, line 5 Income tax for 2022. (This does not include the tax from Part V.) 1,003 2c Add lines 2a and 2b 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) 78.797. 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) Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes: 1,858,916. 1a a Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26 1b b Program-related investments - total from Part VIII-B 2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes

3a

3b

4

1,858,916.

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Amounts set aside for specific charitable projects that satisfy the:

Qualifying distributions. Add lines 1a through 3b. Enter here and on Part XII, line 4

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				78,797.
2 Undistributed income, if any, as of the end of 2022:				
a Enter amount for 2021 only			0.	
b Total for prior years:				
i rotal for prior yours.		0.		
3 Excess distributions carryover, if any, to 2022:				
1 44 404				
L F 0010				
12 225				
10 400				
16 030				
	62,884.			
f Total of lines 3a through e	02,004.			
4 Qualifying distributions for 2022 from Part XI, line 4: \$ 1,858,916.				
			0.	
a Applied to 2021, but not more than line 2a				
b Applied to undistributed income of prior		0.		
years (Election required - see instructions)		0.		
c Treated as distributions out of corpus	0.			
(Election required - see instructions)	0 •			78,797.
d Applied to 2022 distributable amount	1 700 110			10,131.
e Remaining amount distributed out of corpus	1,780,119.			
5 Excess distributions carryover applied to 2022 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
8 Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	1,843,003.			
b Prior years' undistributed income. Subtract				
line 4b from line 2b		0.		
c Enter the amount of prior years'				
undistributed income for which a notice of				
deficiency has been issued, or on which the section 4942(a) tax has been previously				
assessed		0.		
d Subtract line 6c from line 6b. Taxable				
amount - see instructions		0.		
e Undistributed income for 2021. Subtract line				
4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2022. Subtract				
lines 4d and 5 from line 1. This amount must				
be distributed in 2023				0.
7 Amounts treated as distributions out of				
corpus to satisfy requirements imposed by				
section 170(b)(1)(F) or 4942(g)(3) (Election				
may be required - see instructions)	0.			
8 Excess distributions carryover from 2017				
not applied on line 5 or line 7	14,121.			
9 Excess distributions carryover to 2023.	7			
Subtract lines 7 and 8 from line 6a	1,828,882.			
10 Analysis of line 9:	_,			
a Excess from 2018				
b Excess from 2019 13, 225.				
c Excess from 2020 19, 499.				
d Excess from 2021 16, 039.				
e Excess from 2022 1,780,119.				
6 EV 0622 HOLLI SOSS T 1 100 1 T T 3 •				

223581 12-06-22

Form **990-PF** (2022)

Foundation

Part XIII Private Operating Fo	oundations (see ins	structions and Part VI-	A, question 9)	N/A	
1 a If the foundation has received a ruling or	determination letter that	it is a private operating			**************************************
foundation, and the ruling is effective for	2022, enter the date of t	he ruling			
b Check box to indicate whether the founda	ition is a private operatin	g foundation described i	n section	4942(j)(3) or 49)42(j)(5)
2 a Enter the lesser of the adjusted net	Tax year		Prior 3 years		
income from Part I or the minimum	(a) 2022	(b) 2021	(c) 2020	(d) 2019	(e) Total
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	CANAL CONTRACTOR OF THE CONTRA				
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					
000 000					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)			0.200	484	
b "Endowment" alternative test - enter					
2/3 of minimum investment return shown in Part IX, 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		Ni house to make the same of t			
(4) Gross investment income					
Part XIV Supplementary Info	mation (Comple	te this part only	if the foundation	had \$5,000 or me	ore in assets
at any time during the	ne year-see insti	ructions.)			
1 Information Regarding Foundation					
a List any managers of the foundation who	have contributed more	than 2% of the total conf	tributions received by the t	foundation before the clo	se of any tax
year (but only if they have contributed m	ore than \$5,000). (See s	ection 507(d)(2).)			
Susannah M. Swihart					
b List any managers of the foundation who other entity) of which the foundation has			(or an equally large portio	n of the ownership of a p	artnership or
None	a 1070 of grouter interes	J.,			
2 Information Regarding Contribution	on Grant Gift Loon	Scholarship etc. D	rograms'		
			ile organizations and does	not accept unsolicited re	auests for funds. If
the foundation makes gifts, grants, etc.,					4
a The name, address, and telephone numb					
a mo namo, adantos, and tolophone name	or or ornar address or a	to porcon to mism app.			
		CONTROL OF THE CONTRO		w.	
b The form in which applications should be	submitted and informa	tion and materials they s	hould include:		
c Any submission deadlines:		Water and the second			
d Any restrictions or limitations on awards	, such as by geographic	al areas, charitable fields	, kinds of institutions, or o	ther factors:	

Foundation

Part XIV Supplementary Information	(continued)			
3 Grants and Contributions Paid During the Y		Payment		
Recipient	If recipient is an individual, show any relationship to	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	any foundation manager or substantial contributor	recipient		
a Paid during the year				
Morgan Stanley Global Impact Funding Trust Inc.	N/A	PC	General Operating Support	
2000 Westchester Avenue				1 837 /16
Purchase, NY 10577				1,837,416.
The Tides Institute	N/A	PC	General Operating	
43 Water Street			Support	
Eastport, ME 04631				10,000.
United Way of Southern Maine	N/A	PC	General Operating	
550 Forest Avenue, #100			Support	10,000.
Portland, ME 04101				20,000.
				d
				1,857,416.
b Approved for future payment	1	T		1,037,110.
Approved for fatare payment				
None				
				and the second
Total			3b	0.
LOTAL			UO	

Part XV-A	Analysis of	Income-Producing	Activities

nter gross amounts unless otherwise indicated.	Unrelated	d business income		by section 512, 513, or 514	(e)
	(a) Business	(b) Amount	Exclu- sion code	(d) Amount	Related or exempt function income
1 Program service revenue:	code		- Code		
a					
b	-		+		
C		- Company - Comp	++		
d	-		+		
e			+		
f	-		+		
g Fees and contracts from government agencies					
2 Membership dues and assessments			++		
Interest on savings and temporary cash			1 1	1	
investments			14	1.	
Dividends and interest from securities			14	43,016.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other				_	
than inventory			18	31,673.	
9 Net income or (loss) from special events					
O Gross profit or (loss) from sales of inventory					
1 Other revenue:					
a					
b					
С	1				
d		,			
8					
2 Subtotal. Add columns (b), (d), and (e)		C).	74,690.	
3 Total. Add line 12, columns (b), (d), and (e)					74,69
	19				
See worksheet in line 13 instructions to verify calculations.) Part XV-B Relationship of Activities	to the Acco	omplishment of	Exempt	Purposes	
Line No. Explain below how each activity for which inc	ome is reported i	in column (e) of Part XV	-A contribute	ed importantly to the accomp	lishment of
the foundation's exempt purposes (other tha	n by providing fu	nds for such purposes).	/ Continue	ou importantly to the accomp	
the foundation o exempt purposes (other tha	in by providing rai	ndo ioi daoi pai para-yi			
			WW.		
					- Aug
					, , , , , , , , , , , , , , , , , , ,
		AND AND AND	3 - 3 - 3 - 3 - 3 - 3 - 3 - 3 - 3 - 3 -		

Foundation

Part X		egarding Transfers to a	ınd Transactions aı	nd Relationsh	ips With Nonchar	itable		
Exempt Organizations 1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c)							Yes	No
	1 Did the organization directly or indirectly engage in any of the following with any other organization described in 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							X
(2) Other assets								X
	r transactions;							
(1) Sales of assets to a noncharitable exempt organization								X
		ncharitable exempt organization				1b(1) 1b(2)		X
						1b(3)		X
(3) Rental of facilities, equipment, or other assets (4) Reimbursement arrangements						1b(4)		X
(5) Loans or loan guarantees						1b(5)		X
		mbership or fundraising solicitatio				1b(6)		X
		iling lists, other assets, or paid em				1c		X
		"Yes," complete the following sche				ther ass	ets,	
or s	ervices given by the reporting fo	oundation. If the foundation receiv	ed less than fair market valu					
-		other assets, or services received.		(d) Description	of transfers, transactions, and s	haring an	rangeme	nte
(a)Line no	. (b) Amount involved	(c) Name of noncharitable N/A	o ovombr or Aguiranon	(u) Description	or nansiers, nansaonons, and s		3.,901110	
		N/A	- Andrews					
	+							
							Walter	
						,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,		
	 					-		
			China Carlos Car		to the second se			
· Elementary ·					A CONTRACTOR OF THE CONTRACTOR			
								-
				1				
		T SECTION TO SECTION T						
		tly affiliated with, or related to, one				7./	v] No
		on 501(c)(3)) or in section 527?				Yes		NO
b IT "Y	es," complete the following sch (a) Name of org		(b) Type of organization		(c) Description of relations	air		
	N/A	ganization	(b) Type of organization		(v) Boodipaon of Commence			
:	N/A							
-					- Awn - I Samue			
	Under penalties of perjury, I declar	e that I have examined this return, include		d statements, and to the	e best of my knowledge	the IRS	discuss	this
Sign	and belief, it is true, correct, and co	omplete. Declaration of preparer (other the	han taxpayer) is based on all infor	rmation of which prepare	er has any knowledge.	the IRS irn with th wn below	e prepa	er
Here	S 0 6	121	14/20/23	Trustee	Sile	Yes	i Occ in	No
	Signature of officer or trustee		Date	Title				
	Print/Type preparer's na	ame Preparer's s	signature	Date	Check if PTIN			
	, and a second s	1	., 9	-	self- employed			
Paid	aid Connor Smart 2004/20/23 P022855					543		
Prepa			es		Firm's EIN 01-04	9452	6	
Use C		_		- N				
	Firm's address P.C). Box 507						
	Por	tland, ME 04112	2		Phone no. (207)	879-	210	0
					Fo	orm 99	0-PF	(2022)

Form 990-PF Interest on Savi	ngs and Temp	oorary Cash	Investments	Statement 1	
Source	(a) Rever Per Bo	nue Net	(b) Investment Income	(c) Adjusted Net Income	
Morgan Stanley		1.	1.		
Total to Part I, line 3		1.			
Form 990-PF Dividend	ds and Intere	est from Sec	curities	Statement 2	
Source Gross Amount	Capital Gains Dividends	(a) Revenue s Per Bool			
Fidelity Investments 6,973 Morgan Stanley 36,043		0. 6,9° 0. 36,0°			
To Part I, line 4 43,010	5.	43,0	16. 43,03	16.	
Form 990-PF	Accounti	ng Fees		Statement 3	
Description	(a) Expenses Per Books	(b) Net Invest ment Incom	territoria de la companya della companya de la companya della comp		
Accounting Fees	3,000.	1,50	0.	1,500.	
To Form 990-PF, Pg 1, ln 16b	3,000.	1,50	0.	1,500.	
Form 990-PF	Other Profes	sional Fees		Statement 4	
Description	(a) Expenses Per Books	(b) Net Invest ment Incom			
Investment Fees	109.	10	9.	0.	
To Form 990-PF, Pg 1, ln 16c	109.	10	9.	0.	

Form 990-PF	Tax	es	Statement 5		
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
Excise Taxes Foreign Taxes	2,088. 934.	0. 934.		0. 0.	
To Form 990-PF, Pg 1, ln 18	3,022.	934.		0.	
Form 990-PF Statemen Termination	t Concerning , etc Pa	Liquidation, rt VI-A, Line		tatement 6	

Explanation

During 2022, the trustees of the Foundation voted to terminate and formally dissolve the Foundation. At that time, the Foundation began making liquidating distributions as part of the process to terminate as a private foundation. The Foundation completed liquidation of its remaining assets by paying out grants to various 501(c)(3) organizations described as public charities under Section 509(a)(1) along with final administrative and state filing fees. At the time of this filing, The Foundation has no remaining right, title, or interest in any assets and therefore does not owe any private foundation termination tax under Section 507(c) of the Internal Revenue Code. The \$397 refund due to the Foundation from the IRS on this return will be signed over to the Morgan Stanley Global Impact Funding Trust in 2023, once the refund is received. As this will be the final tax return filed by the Foundation, the \$397 refund has been included in the total amount paid to the Morgan Stanley Global Impact Funding Trust, as is reported on this Form 990-PF, Part XIV.

Founda

Form 990-PF Dissolution Statement Statement 7

Name of Recipient
The Tides Institute

Address of Recipient

43 Water Street
Eastport, ME 04631

Explanation of Distributed Assets

Cash for charitable purposes

Name of Recipient

United Way of Southern Maine

Address of Recipient

550 Forest Avenue, #100 Portland, ME 04101

Fair Market Value of Assets

10,000.

Explanation of Distributed Assets

Cash for charitable purposes

Name of Recipient

Morgan Stanley Global Impact Funding Trust Inc.

Address of Recipient

2000 Westchester Avenue Purchase , NY 10577

Fair Market Value of Assets

1,837,416.

Explanation of Distributed Assets

Cash and stock for charitable purposes

Explanation Concerning Part VI-A, Line 12 Form 990-PF Qualifying Distribution Statement

Statement

8

Explanation

During the period covered by this tax return, the Foundation made qualified charitable disbursements to the Morgan Stanley Global Impact Funding Trust Inc. (the "Trust"), a 501(c)(3) tax exempt public charity under Section 170(b)(1)(A)(vi). To the best of the Foundation's knowledge, the Trust has been organized as such for at least a continuous 60-months prior to the Foundation making liquidating distributions. The contributions paid by the Foundation are to be managed, maintained, and used by a donor advised fund over which the Foundation's trustees have advisory privileges. The intended use of these funds will to be support charitable purposes with a similar scope and vision as the Foundation was established to support. The Foundation has elected to treat these contributions as qualifying distributions on this tax return.

Form 990-PF Explanation Concerning Part VI-A, Line 12 Statement 9
Section 170(c)(2)(B) Statement

Explanation

The contributed funds to the donor advised fund are to be used to accomplish one or more purposes that are described under Section 170(c)(2)(B), specifically for the sole and exclusive purpose of distributing the proceeds to one or more other charitable organizations which are qualified under Section 170(c), 170(b)(1)(A), 2055(a), and 2522(a).

Electronic Filing PDF Attachment

THE SUSANNAH M. SWIHART CHARITABLE FOUNDATION

Trustees' Resolution of Dissolution

WHEREAS, SUSANNAH M. SWIHART, as Trustee, established The Susannah M. Swihart Charitable Foundation (the "Foundation") by Declaration of Trust dated December 19, 1999, as amended by an Amendment dated June 26, 2002, with herself as initial Trustee and ABIGAIL S. ARMSTRONG and KARL TURNER as Successor Trustees (the "Trust"); and

WHEREAS, SUSANNAH M. SWIHART and ABIGAIL S. ARMSTRONG are the current Trustees of the Trust; and

WHEREAS, Article SECOND (b) of the Trust provides as follows:

"(b) This trust shall continue for ever unless the trustees terminate it and distribute all of the principal and income, which action may be taken by the trustees, in their discretion, at any time. On such termination, the then remaining principal and any balance of net income shall be distributed to or for the use of such one or more charitable organizations, in such amounts, and for such charitable purposes as the trustees, in their discretion, shall then select and determine."

and;

WHEREAS, the term "charitable organizations" is defined under Article SECOND (d) of the Trust to mean corporations, trusts, funds, foundations, or community chests created or organized in the United States or in any of its possessions, <u>provided</u> that all such organizations must be those which are operated exclusively for charitable purposes and which are entitled to exemption under Section 501(c)(3) of the Code; and references to "charitable purposes" shall include only public charitable or educational, religious, scientific, or literary purposes within the meaning of Section 170(c)(2)(B) of the Code; and

WHEREAS, the Trustees now wish to terminate the Foundation and distribute the remaining principal and income in accordance with the attached Plan of Dissolution;

Susannah M. Swihart Charitable Foundation EIN: 01-0534479

THE SUSANNAH M. SWIHART CHARITABLE FOUNDATION

Trustees' Resolution of Dissolution

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WHEREAS, the Trustees now wish to terminate the Foundation and distribute the remaining principal and income in accordance with the attached Plan of Dissolution;

Susannah M. Swihart Charitable Foundation EIN: 01-0534479

Exhibit A

THE SUSANNAH M. SWIHART CHARITABLE FOUNDATION PLAN OF DISSOLUTION

- 1. The Susannah M. Swihart Fund. The Susannah M. Swihart Foundation (the "Foundation") shall distribute all of its assets to the donor-advised fund at Morgan Stanley Global Impact Funding Trust ("MS GIFT"), known as the Susannah M. Swihart Charitable Account, on the terms set forth in the attached Advised Fund Agreement. Although certain Trustees of the Foundation will serve as advisers to the fund, MS GIFT will have final authority over the investment and distribution of the Susannah M. Swihart Charitable Account.
- 2. MS GIFT is a tax-exempt organization organized and operated exclusively for the charitable purposes described in Sections 501(c)(3) and 170(b)(1)(A) of the Internal Revenue Code of 1986, as amended, and has been in existence (and so described) for a continuous period of more than 60 calendar months immediately preceding the date hereof.
- 3. <u>Winding Up</u>. The Foundation shall cease the active conduct of its business, wind up its affairs, and distribute all of its assets to the Susannah M. Swihart Charitable Account at MS GIFT, retaining only a reserve to pay final expenses.
- 4. <u>Final 990-PF</u>. The Trustees of the Foundation shall execute and file a final Form 990-PF and any other applicable returns with the Internal Revenue Service.
- 5. <u>Dissolution</u>. The Trustees shall then transfer the remaining assets of the Foundation to the Susannah M. Swihart Charitable Account at MS GIFT.

Susannah M. Swihart Charitable Foundation EIN: 01-0534479

NOW THEREFORE, pursuant to the power reserved under Article SECOND (b) of the Trust, the undersigned Trustees hereby agree to terminate The Susannah M. Swihart Charitable by distribution of all assets to one or more charitable organizations and for such charitable purposes in accordance with the attached Plan of Dissolution, and to do all things necessary or advisable to implement the Plan of Dissolution.

Dated: November 19, 2022

Susannah M. Swihart, Trustee

Abigail S. Armstrong, Trustee

Susannah M. Swihart Charitable Foundation EIN: 01-0534479

Exhibit A

THE SUSANNAH M. SWIHART CHARITABLE FOUNDATION PLAN OF DISSOLUTION

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- 3. <u>Winding Up</u>. The Foundation shall cease the active conduct of its business, wind up its affairs, and distribute all of its assets to the Susannah M. Swihart Charitable Account at MS GIFT, retaining only a reserve to pay final expenses.
- 4. <u>Final 990-PF</u>. The Trustees of the Foundation shall execute and file a final Form 990-PF and any other applicable returns with the Internal Revenue Service.
- 5. <u>Dissolution</u>. The Trustees shall then transfer the remaining assets of the Foundation to the Susannah M. Swihart Charitable Account at MS GIFT.

Susannah M. Swihart Charitable Foundation EIN: 01-0534479

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Dated: November 19, 2022

Susannah M. Swihart, Trustee

Abigail S. Armstrong, Trustee

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