

**Return of Private Foundation**

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

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**2022**

Open to Public Inspection

Form **990-PF**

Department of the Treasury  
Internal Revenue Service

For calendar year 2022 or tax year beginning

, and ending

Name of foundation <b>Firebird Foundation for Anthropological Research</b>		<b>A Employer identification number</b> <b>01-0524375</b>
Number and street (or P.O. box number if mail is not delivered to street address) <b>P.O. Box A</b>	Room/suite	<b>B Telephone number</b> <b>207-639-3939</b>
City or town, state or province, country, and ZIP or foreign postal code <b>Phillips, ME 04966-1501</b>		<b>C</b> If exemption application is pending, check here ... <input type="checkbox"/>
<b>G</b> Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		<b>D 1.</b> Foreign organizations, check here ..... <input type="checkbox"/> <b>2.</b> Foreign organizations meeting the 85% test, check here and attach computation ..... <input type="checkbox"/>
<b>H</b> Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		<b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here ... <input type="checkbox"/>
<b>I</b> Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ <b>60,520,966.</b>	<b>J</b> Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	<b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ... <input type="checkbox"/>

<b>Part I Analysis of Revenue and Expenses</b> <small>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)</small>		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
<b>Revenue</b>	<b>1</b> Contributions, gifts, grants, etc., received .....	25,069,426.		N/A	
	<b>2</b> Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
	<b>3</b> Interest on savings and temporary cash investments .....	475,015.	213,042.		Statement 1
	<b>4</b> Dividends and interest from securities .....	442,789.	442,789.		Statement 2
	<b>5a</b> Gross rents .....				
	<b>b</b> Net rental income or (loss) .....				
	<b>6a</b> Net gain or (loss) from sale of assets not on line 10 .....	3,986,152.			
	<b>b</b> Gross sales price for all assets on line 6a ..... <b>37,473,488.</b>				
	<b>7</b> Capital gain net income (from Part IV, line 2) .....		3,986,152.		
	<b>8</b> Net short-term capital gain .....				
	<b>9</b> Income modifications .....				
	<b>10a</b> Gross sales less returns and allowances .....				
<b>b</b> Less: Cost of goods sold .....					
<b>c</b> Gross profit or (loss) .....					
<b>11</b> Other income .....	120,861.	28,481.		Statement 3	
<b>12 Total.</b> Add lines 1 through 11 .....	30,094,243.	4,670,464.			
<b>Operating and Administrative Expenses</b>	<b>13</b> Compensation of officers, directors, trustees, etc. ....	71,305.	0.		71,305.
	<b>14</b> Other employee salaries and wages .....	219,884.	0.		219,884.
	<b>15</b> Pension plans, employee benefits .....	91,102.	0.		91,102.
	<b>16a</b> Legal fees ..... <b>Stmt 4</b>	11,354.	0.		11,354.
	<b>b</b> Accounting fees ..... <b>Stmt 5</b>	9,500.	4,750.		4,750.
	<b>c</b> Other professional fees ..... <b>Stmt 6</b>	323,430.	201,135.		122,295.
	<b>17</b> Interest .....				
	<b>18</b> Taxes ..... <b>Stmt 7</b>	66,997.	7,517.		9,220.
	<b>19</b> Depreciation and depletion .....	12,778.	0.		
	<b>20</b> Occupancy .....	25,297.	0.		25,297.
	<b>21</b> Travel, conferences, and meetings .....	18,369.	0.		18,369.
	<b>22</b> Printing and publications .....				
	<b>23</b> Other expenses ..... <b>Stmt 8</b>	43,056.	0.		43,056.
	<b>24 Total operating and administrative expenses.</b> Add lines 13 through 23 .....	893,072.	213,402.		616,632.
	<b>25</b> Contributions, gifts, grants paid .....	2,056,095.			2,056,095.
<b>26 Total expenses and disbursements.</b> Add lines 24 and 25 .....	2,949,167.	213,402.		2,672,727.	
<b>27</b> Subtract line 26 from line 12:					
<b>a</b> Excess of revenue over expenses and disbursements ...	27,145,076.				
<b>b Net investment income</b> (if negative, enter -0-)		4,457,062.			
<b>c Adjusted net income</b> (if negative, enter -0-)			N/A		

**Firebird Foundation for Anthropological Research**

<b>Part II Balance Sheets</b> Attached schedules and amounts in the description column should be for end-of-year amounts only.		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	1 Cash - non-interest-bearing	29,914.	15,496.	15,496.
	2 Savings and temporary cash investments	1,950,315.	2,008,914.	2,008,914.
	3 Accounts receivable			
	Less: allowance for doubtful accounts			
	4 Pledges receivable			
	Less: allowance for doubtful accounts			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable			
	Less: allowance for doubtful accounts			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations Stmt 12	1,001,645.	5,355,005.	4,958,447.
	b Investments - corporate stock Stmt 13	20,520,076.	32,359,904.	34,247,990.
	c Investments - corporate bonds Stmt 14	1,964,526.	5,877,137.	5,581,940.
	11 Investments - land, buildings, and equipment: basis			
Less: accumulated depreciation				
12 Investments - mortgage loans Stmt 15	1,738,718.	5,277,758.	5,086,065.	
13 Investments - other Stmt 16	10,082,551.	10,052,459.	7,668,883.	
14 Land, buildings, and equipment: basis 930,207.				
Less: accumulated depreciation Stmt 11 163,035.	760,523.	767,172.	856,094.	
15 Other assets (describe Statement 17)	132,606.	97,137.	97,137.	
16 <b>Total assets</b> (to be completed by all filers - see the instructions. Also, see page 1, item I)	38,180,874.	61,810,982.	60,520,966.	
<b>Liabilities</b>	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe Statement 18)	95,452.	70,055.	
23 <b>Total liabilities</b> (add lines 17 through 22)	95,452.	70,055.		
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow FASB ASC 958, check here</b> <input checked="" type="checkbox"/> <b>and complete lines 24, 25, 29, and 30.</b>			
	24 Net assets without donor restrictions	38,085,422.	61,740,927.	
	25 Net assets with donor restrictions			
	<b>Foundations that do not follow FASB ASC 958, check here</b> <input type="checkbox"/> <b>and complete lines 26 through 30.</b>			
	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 <b>Total net assets or fund balances</b>	38,085,422.	61,740,927.	
30 <b>Total liabilities and net assets/fund balances</b>	38,180,874.	61,810,982.		

**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	38,085,422.
2 Enter amount from Part I, line 27a	2	27,145,076.
3 Other increases not included in line 2 (itemize) See Statement 9	3	2,949.
4 Add lines 1, 2, and 3	4	65,233,447.
5 Decreases not included in line 2 (itemize) See Statement 10	5	3,492,520.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29	6	61,740,927.

**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (for example, real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a Publicly Traded Securities	P		
b Capital Gains Dividends			
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 37,470,815.		33,487,336.	3,983,479.
b 2,673.			2,673.
c			
d			
e			

(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	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			3,983,479.
b			2,673.
c			
d			
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 ..... }	2	3,986,152.
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	N/A

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary - see instructions)	1	61,953.
b All other domestic foundations enter 1.39% (0.0139) of line 27b. Exempt foreign organizations, enter 4% (0.04) of Part I, line 12, col. (b) .....		
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) .....	2	0.
3 Add lines 1 and 2 .....	3	61,953.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only; others, enter -0-) .....	4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- .....	5	61,953.
6 Credits/Payments:		
a 2022 estimated tax payments and 2021 overpayment credited to 2022 .....	6a	85,575.
b Exempt foreign organizations - tax withheld at source .....	6b	0.
c Tax paid with application for extension of time to file (Form 8868) .....	6c	50,000.
d Backup withholding erroneously withheld .....	6d	0.
7 Total credits and payments. Add lines 6a through 6d .....	7	135,575.
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached .....	8	0.
9 Tax due. If the total of lines 5 and 8 is more than 7, enter amount owed .....	9	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid .....	10	73,622.
11 Enter the amount of line 10 to be: Credited to 2023 estimated tax 73,622. Refunded .....	11	0.

**Part VI-A Statements Regarding Activities**

		Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? .....		X
1b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition ..... If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
1c	Did the foundation file Form 1120-POL for this year? .....		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ <u>0.</u> (2) On foundation managers. \$ <u>0.</u>		
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ <u>0.</u>		
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? .....		X
	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 bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes .....		X
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year? .....		X
4b	If "Yes," has it filed a tax return on Form 990-T for this year? .....		N/A
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? .....		X
	If "Yes," attach the statement required by General Instruction T.		
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 remain in the governing instrument? .....	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 .....	X	
8a	Enter the states to which the foundation reports or with which it is registered. See instructions. _____ <b>ME</b>		
8b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .....	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2022 or the tax year beginning in 2022? See the instructions for Part XIII. If "Yes," complete Part XIII .....		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses .....		X
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions .....		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions .....		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? .....	X	
	Website address <u>https://www.firebirdfellowships.org/</u>		
14	The books are in care of <u>Elizabeth Choate</u> Telephone no. <u>207-639-3939</u> Located at <u>P.O. Box A, Phillips, ME</u> ZIP+4 <u>04966-1501</u>		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here ..... <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year .....		N/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, securities, or other financial account in a foreign country? .....	X	
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country <u>Bhutan</u>		

**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.

	Yes	No
<b>1a</b> 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? .....	1a(1)	X
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? .....	1a(2)	X
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? .....	1a(3)	X
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? .....	1a(4)	X
(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)? .....	1a(5)	X
(6) Agree to pay money or property to a government official? ( <b>Exception.</b> 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.) .....	1a(6)	X
<b>b</b> If any answer is "Yes" to 1a(1)-(6), did <b>any</b> 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 .....	1b	X
<b>c</b> Organizations relying on a current notice regarding disaster assistance, check here <input type="checkbox"/>		
<b>d</b> 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? .....	1d	X
<b>2</b> 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)):		
<b>a</b> 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? .....	2a	X
If "Yes," list the years _____, _____, _____, _____		
<b>b</b> Are there any years listed in 2a for which the foundation is <b>not</b> 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 <b>all</b> years listed, answer "No" and attach statement - see instructions.) .....	2b	N/A
<b>c</b> If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here. _____, _____, _____, _____		
<b>3a</b> Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? .....	3a	X
<b>b</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 Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2022.) .....	3b	N/A
<b>4a</b> Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? .....	4a	X
<b>b</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? .....	4b	X

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

	Yes	No
<b>5a</b> 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))?		X
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?		X
(3) Provide a grant to an individual for travel, study, or other similar purposes?	X	
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions		X
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?		X
<b>b</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		X
<b>c</b> Organizations relying on a current notice regarding disaster assistance, check here <input type="checkbox"/>		
<b>d</b> 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? <span style="float:right">N/A</span>		
If "Yes," attach the statement required by Regulations section 53.4945-5(d).		
<b>6a</b> Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		X
<b>b</b> Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870.		X
<b>7a</b> At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?		X
<b>b</b> If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? <span style="float:right">N/A</span>		
<b>8</b> Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment(s) during the year?		X

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Charity R. Appell P.O. Box A Phillips, ME 04966-1501	Exec. Director/Vice President 20.00	54,130.	17,175.	0.
Steven G. Hoch P.O. Box A Phillips, ME 04966-1501	Director 10.00	0.	0.	0.
Laura P. Appell-Warren P.O. Box A Phillips, ME 04966-1501	Pres./Sec./Treas./Director 10.00	0.	0.	0.
Amity A. Doolittle P.O. Box A Phillips, ME 04966-1501	Director/Vice President 10.00	0.	0.	0.

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Patricia Gordon P.O. Box A, Phillips, ME 04966-1501	Administrative 36.00	101,017.	20,064.	0.
Cheryl Keith P.O. Box A, Phillips, ME 04966-1501	Administrative 36.00	82,984.	19,523.	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. If none, enter "NONE."**

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
Fidelity Brokerage Services LLC P.O. Box 28019, Albuquerque, NM 87125	Investment Advisory	203,877.
University of California, LA 405 Hilgard Avenue, Los Angeles, CA 90095	Consulting	60,500.
Total number of others receiving over \$50,000 for professional services .....		0

**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 number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 See Statement 19	636,059.
2	
3	
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 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	55,684,766.
b	Average of monthly cash balances .....	1b	2,004,163.
c	Fair market value of all other assets (see instructions) .....	1c	14,161.
d	<b>Total</b> (add lines 1a, b, and c) .....	1d	57,703,090.
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	57,703,090.
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions) .....	4	865,546.
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3 .....	5	56,837,544.
6	<b>Minimum investment return.</b> Enter 5% (0.05) of line 5 .....	6	2,841,877.

**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	2,841,877.
2a	Tax on investment income for 2022 from Part V, line 5 .....	2a	61,953.
b	Income tax for 2022. (This does not include the tax from Part V.) .....	2b	
c	Add lines 2a and 2b .....	2c	61,953.
3	Distributable amount before adjustments. Subtract line 2c from line 1 .....	3	2,779,924.
4	Recoveries of amounts treated as qualifying distributions .....	4	2,292.
5	Add lines 3 and 4 .....	5	2,782,216.
6	Deduction from distributable amount (see instructions) .....	6	0.
7	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1 .....	7	2,782,216.

**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	2,672,727.
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	19,427.
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	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part XII, line 4 .....	4	2,692,154.

Form 990-PF (2022)



**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				2,782,216.
2 Undistributed income, if any, as of the end of 2022:				
a Enter amount for 2021 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2022:				
a From 2017				
b From 2018				
c From 2019				
d From 2020				
e From 2021		3,992.		
f Total of lines 3a through e	3,992.			
4 Qualifying distributions for 2022 from Part XI, line 4: \$ 2,692,154.				
a Applied to 2021, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2022 distributable amount				2,692,154.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2022 (If an amount appears in column (d), the same amount must be shown in column (a).)	3,992.			3,992.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	0.			
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				86,070.
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	0.			
9 Excess distributions carryover to 2023. Subtract lines 7 and 8 from line 6a	0.			
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				

**Firebird Foundation for  
Anthropological Research**

**Part XIII Private Operating Foundations** (see instructions 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 the ruling \_\_\_\_\_

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

	Tax year				(e) Total
	(a) 2022	(b) 2021	(c) 2020	(d) 2019	
<b>2 a</b> Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part IX for each year listed _____					
<b>b</b> 85% (0.85) of line 2a _____					
<b>c</b> Qualifying distributions from Part XI, line 4, for each year listed _____					
<b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities _____					
<b>e</b> Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c _____					
<b>3</b> Complete 3a, b, or c for the alternative test relied upon:					
<b>a</b> "Assets" alternative test - enter:					
<b>(1)</b> Value of all assets _____					
<b>(2)</b> Value of assets qualifying under section 4942(j)(3)(B)(i) _____					
<b>b</b> "Endowment" alternative test - enter 2/3 of minimum investment return shown in Part IX, line 6, for each year listed _____					
<b>c</b> "Support" alternative test - enter:					
<b>(1)</b> Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) _____					
<b>(2)</b> Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii) _____					
<b>(3)</b> Largest amount of support from an exempt organization _____					
<b>(4)</b> Gross investment income _____					

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

**1 Information Regarding Foundation Managers:**  
**a** List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)  
 None

**b** List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.  
 None

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

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

**See Statement 20**

**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:

**Firebird Foundation for  
Anthropological Research**

Form 990-PF (2022)

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**Part XIV Supplementary Information** *(continued)*

<b>3 Grants and Contributions Paid During the Year or Approved for Future Payment</b>				
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)				
<b>a Paid during the year</b>				
Blackfoot Challenge P.O. Box 103 Ovando, MT 59854	N/A	PC	General operating support	150,000.
Chewonki Foundation 485 Chewonki Neck Road Wiscasset, ME 04578	N/A	PC	General operating support	300,000.
Christian Poske Worthbarg 11 Damendorft, Schleswig-Holstein, GERMANY 24361	N/A	I	Fellowships in the Collection of Oral Literature & Traditional Knowledge	7,263.
Christopher Holz c/o CQU University Rockhampton, Queensland, AUSTRALIA QLD 4701	N/A	I	Fellowships in the Collection of Oral Literature & Traditional Knowledge	7,120.
Cold Spring School, Inc. 263 Chapel Street New Haven, CT 06513	N/A	PC	General operating support	200,000.
<b>Total</b>	<b>See continuation sheet(s)</b>			<b>3a</b> 2,056,095.
<b>b Approved for future payment</b>				
<b>None</b>				
<b>Total</b>				
				<b>3b</b> 0.

Form 990-PF (2022)

Part XV-A Analysis of Income-Producing Activities

Table with 5 main columns: (a) Business code, (b) Amount, (c) Exclusion code, (d) Amount, (e) Related or exempt function income. Rows include: 1 Program service revenue, 2 Membership dues and assessments, 3 Interest on savings and temporary cash investments (475,015), 4 Dividends and interest from securities (442,789), 8 Gain or (loss) from sales of assets other than inventory (3,986,152), 11 Other revenue: Pass-through Ordinary Income/(Loss) (28,481), Investment Income (92,380), 12 Subtotal (5,024,817), 13 Total (5,024,817).

(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 (other than by providing funds for such purposes).

**Firebird Foundation for  
Anthropological Research**

Form 990-PF (2022)

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**Part XVI Information Regarding Transfers to and Transactions and Relationships With Noncharitable Exempt Organizations**

		Yes	No
1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a Transfers from the reporting foundation to a noncharitable exempt organization of:			
(1) Cash .....	1a(1)		X
(2) Other assets .....	1a(2)		X
b Other transactions:			
(1) Sales of assets to a noncharitable exempt organization .....	1b(1)		X
(2) Purchases of assets from a noncharitable exempt organization .....	1b(2)		X
(3) Rental of facilities, equipment, or other assets .....	1b(3)		X
(4) Reimbursement arrangements .....	1b(4)		X
(5) Loans or loan guarantees .....	1b(5)		X
(6) Performance of services or membership or fundraising solicitations .....	1b(6)		X
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees .....	1c		X
d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.			

(a) Line no.	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
		N/A	

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

b If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

<b>Sign Here</b>	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.				May the IRS discuss this return with the preparer shown below? See instr. <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
	Signature of officer or trustee <i>Kenna P Appelbaum</i> _____	Date <b>Nov 8, 2023</b> _____	Title <b>President</b> _____		
<b>Paid Preparer Use Only</b>	Print/Type preparer's name	Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
	Connor Smart	<i>Connor Smart</i>	11/07/23		P02285543
	Firm's name <b>Baker Newman &amp; Noyes</b>	Firm's EIN <b>01-0494526</b>			
Firm's address <b>P.O. Box 507 Portland, ME 04112</b>				Phone no. <b>(207)879-2100</b>	

Form 990-PF (2022)

**Part XIV** Supplementary Information

**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Dario Novellino 41 Castello Fraz. Maranola Formia, ITALY 04023	N/A	I	Fellowships in the Collection of Oral Literature & Traditional Knowledge	36,000.
Forest Society of Maine 115 Franklin Street Bangor, ME 04401	N/A	PC	General operating support	40,021.
Hans Stefan Danerek JI KH Abdurrahman, No. 114 Cipayung Depok, Jawa Barat, INDONESIA RT07 RW01	N/A	I	Fellowships in the Collection of Oral Literature & Traditional Knowledge	9,000.
Kavita Rastogi Raja Bazar Lucknow, Uttar Pradesh, INDIA 222/46	N/A	I	Fellowships in the Collection of Oral Literature & Traditional Knowledge	7,718.
Khawaja Rehman c/o Education Colleges, Block D District Kashmir, PAKISTAN	N/A	I	Fellowships in the Collection of Oral Literature & Traditional Knowledge	8,100.
Lesley Hatipone Machiridza 9589 Lundistar Drive Rhodene, Masvigo, ZIMBABWE	N/A	I	Fellowships in the Collection of Oral Literature & Traditional Knowledge	8,139.
Living Tongue Institute for Endangered Languages 4676 Commercial Street SE, # 454 Salem, OR 97302	N/A	PC	Fellowships in the Collection of Oral Literature & Traditional Knowledge	9,000.
Maine Coast Heritage Trust 1 Bowdoin Mill Island, Suite 201 Topsham, ME 04086	N/A	PC	General operating support	150,000.
Maine Mountain Collaborative 45 Exchange Street Portland, ME 04101	N/A	PC	General operating support	75,000.
Marguerite Biesele 4811-B Shoalwood Avenue Austin, TX 78756	N/A	I	Fellowships in the Collection of Oral Literature & Traditional Knowledge	9,000.
<b>Total from continuation sheets</b>				<b>1,391,712.</b>

**Part XIV Supplementary Information**

**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Mechek Sampar Awan P.O. Bishnupur Nungsai Chiru Village, Manipur, INDIA	N/A	I	Fellowships in the Collection of Oral Literature & Traditional Knowledge	9,000.
Neighborhood Music School 100 Audubon Street New Haven, CT 06510	N/A	PC	General operating support	567,000.
Northeast Wilderness Trust 17 State Street, Suite 302 Montpelier, VT 05602	N/A	PC	General operating support	25,000.
O Odogun c/o Akpo re Ufuoma Development Initiative Effurun, Delta State, NIGERIA 330102	N/A	I	Fellowships in the Collection of Oral Literature & Traditional Knowledge	8,927.
Pauthang Haokip NTH 81 JNU New Delhi, INDIA 110067	N/A	I	Fellowships in the Collection of Oral Literature & Traditional Knowledge	9,396.
Phillips Public Library P.O. Box O Phillips, ME 04966	N/A	PC	General operating support	10,000.
Rangeley Lakes Heritage Trust 2424 Main Street Rangeley, ME 04970	N/A	PC	General operating support	275,000.
Razzeko Delley Ezengo, c/o Intaya Public School Roing, Arunachal Pradesh, INDIA 792110	N/A	I	Fellowships in the Collection of Oral Literature & Traditional Knowledge	5,400.
Song Zhanfeng Building 3, Huazangsi Township Wuwei City, Gansu Province, CHINA	N/A	I	Fellowships in the Collection of Oral Literature & Traditional Knowledge	7,065.
Tiatoshi Jamir c/o Nagaland University Meriema, Nagaland, INDIA 797004	N/A	I	Fellowships in the Collection of Oral Literature & Traditional Knowledge	8,946.
<b>Total from continuation sheets</b>				

**Part XIV** Supplementary Information

**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
University of Sydney City Road Sydney, Camperdown, AUSTRALIA NSW 2006	N/A	GOV	f/b/o Center for Cultural Linguistic Diversity & TRICL	114,000.
<b>Total from continuation sheets</b> .....				



**Schedule B**  
**(Form 990)**

Department of the Treasury  
Internal Revenue Service

**Schedule of Contributors**

Attach to Form 990 or Form 990-PF.  
Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No. 1545-0047

**2022**

Name of the organization <b>Firebird Foundation for Anthropological Research</b>	Employer identification number <b>01-0524375</b>
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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 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 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990), 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 (entering "N/A" in column (b) instead of the contributor name and address), 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), 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 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990).

Name of organization <b>Firebird Foundation for Anthropological Research</b>	Employer identification number <b>01-0524375</b>
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**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	Estate of George N. Appell  c/o Laura P. Appell Warren; P.O. Box A  Phillips, ME 04966	\$ 25,059,426.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions.)
2	Fidelity Investments Charitable Gift Fund  200 Seaport Boulevard  Boston, MA 02210	\$ 10,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
		\$ _____	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)

Name of organization <b>Firebird Foundation for Anthropological Research</b>	Employer identification number <b>01-0524375</b>
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**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
1	Publicly traded securities _____ _____ _____	\$ 8,318,836.	04/05/22
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____
_____	_____ _____ _____	\$ _____	_____

Name of organization <b>Firebird Foundation for Anthropological Research</b>	Employer identification number <b>01-0524375</b>
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**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 info. once.) \$ \_\_\_\_\_  
 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
<b>(e) Transfer of gift</b>			
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
<b>(e) Transfer of gift</b>			
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
<b>(e) Transfer of gift</b>			
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
<b>(e) Transfer of gift</b>			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	

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Form 990-PF Interest on Savings and Temporary Cash Investments Statement 1

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Source	(a) Revenue Per Books	(b) Net Investment Income	(c) Adjusted Net Income
Portfolios and Bank Accounts	213,042.	213,042.	
Tax-Exempt Interest	261,973.	0.	
Total to Part I, line 3	475,015.	213,042.	

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Form 990-PF Dividends and Interest from Securities Statement 2

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Source	Gross Amount	Capital Gains Dividends	(a) Revenue Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income
Investment Portfolios	445,462.	2,673.	442,789.	442,789.	
To Part I, line 4	445,462.	2,673.	442,789.	442,789.	

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Form 990-PF Other Income Statement 3

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Description	(a) Revenue Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income
Pass-through Ordinary Income/(Loss)	28,481.	28,481.	
Investment Income Recorded Per Books	92,380.	0.	
Total to Form 990-PF, Part I, line 11	120,861.	28,481.	

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Form 990-PF	Legal Fees			Statement	4
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
Legal Fees	11,354.	0.		11,354.	
To Fm 990-PF, Pg 1, ln 16a	11,354.	0.		11,354.	

Form 990-PF	Accounting Fees			Statement	5
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
Accounting Fees	9,500.	4,750.		4,750.	
To Form 990-PF, Pg 1, ln 16b	9,500.	4,750.		4,750.	

Form 990-PF	Other Professional Fees			Statement	6
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
Payroll Service Providers Investment Advisory Services	3,026.	0.		3,026.	
Consulting and Management	201,135. 119,269.	201,135. 0.		0. 119,269.	
To Form 990-PF, Pg 1, ln 16c	323,430.	201,135.		122,295.	

Form 990-PF	Taxes			Statement	7
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
Excise Taxes	50,260.	0.		0.	
Foreign Taxes	7,517.	7,517.		0.	
Sales and Use Taxes	161.	0.		161.	
Property Taxes	9,059.	0.		9,059.	
To Form 990-PF, Pg 1, ln 18	66,997.	7,517.		9,220.	

Form 990-PF	Other Expenses			Statement	8
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes	
Insurance	7,000.	0.		7,000.	
Information Technology	6,890.	0.		6,890.	
Currency Conversions	889.	0.		889.	
State Filing Fees	75.	0.		75.	
Office and Administrative Dues and Subscriptions	27,261. 941.	0. 0.		27,261. 941.	
To Form 990-PF, Pg 1, ln 23	43,056.	0.		43,056.	

Form 990-PF	Other Increases in Net Assets or Fund Balances	Statement	9
Description		Amount	
Recoveries of Prior Period Distributions		2,292.	
Accrual-to-Cash Adjustment		657.	
Total to Form 990-PF, Part III, line 3		2,949.	

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Form 990-PF	Other Decreases in Net Assets or Fund Balances	Statement	10
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Description	Amount
Excise Tax Timing Differences	24,740.
Unrealized Loss on Investments	3,467,780.
<b>Total to Form 990-PF, Part III, line 5</b>	<b>3,492,520.</b>

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Form 990-PF	Depreciation of Assets Not Held for Investment	Statement	11
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Description	Cost or Other Basis	Accumulated Depreciation	Book Value	Fair Market Value
Land	32,290.	0.	32,290.	32,290.
Buildings	845,547.	129,294.	716,253.	805,175.
Leasehold Improvements	1,583.	1,583.	0.	
Equipment	50,787.	32,158.	18,629.	18,629.
<b>To 990-PF, Part II, ln 14</b>	<b>930,207.</b>	<b>163,035.</b>	<b>767,172.</b>	<b>856,094.</b>

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Form 990-PF	U.S. and State/City Government Obligations	Statement	12
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Description	U.S. Gov't	Other Gov't	Book Value	Fair Market Value
140000 shs CALIFORNIA HEALTH FACS (CUSIP: 13032UVJ4)		X	149,014.	118,679.
75000 shs SAN DIEGO CNTY CALIF WTR (CUSIP: 797412DW0)		X	76,028.	54,710.
US TREASURY BONDS	X		2,086,853.	1,821,280.
65000 shs PNC FINL SVCS (CUSIP: 693475BB0)		X	59,302.	57,055.
60000 shs NXP BV / NXP FDG LLC (CUSIP: 62954HBE7)		X	59,900.	57,537.
150000 shs KING CNTY WASH TAXABLE (CUSIP: 49474FF54)		X	140,364.	140,015.
175000 shs MASSACHUSETTS ST SPL OBLIG (CUSIP: 576004GY5)		X	175,295.	171,768.
100000 shs WHEELING W VA WTRWKS (CUSIP: 963270GW7)		X	94,000.	91,533.



150000 shs NEW YORK NY CITY HSG DEV (CUSIP: 64966WHA8)	X	149,354.	140,826.
US TREASURY / AGENCY SECURITIES	X	2,364,895.	2,305,044.
Total U.S. Government Obligations		4,451,748.	4,126,324.
Total State and Municipal Government Obligations		903,257.	832,123.
Total to Form 990-PF, Part II, line 10a		5,355,005.	4,958,447.

Form 990-PF	Corporate Stock	Statement	13
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Description	Book Value	Fair Market Value
197154.132 shs BAFWX	6,473,711.	6,819,561.
227955.140 shs BAFLX	3,794,936.	4,290,116.
122506.732 shs BAFQX	977,604.	1,215,267.
315 shs CAN	31,789.	84,055.
5139 shs NOMD	88,971.	88,596.
242 shs ADBE	72,444.	81,440.
385 shs A	28,654.	57,615.
284 shs ALGN	57,811.	59,896.
1917 shs GOOG	73,252.	170,095.
1442 shs GOOGL	56,397.	127,228.
1562 shs AMZN	190,240.	131,208.
497 shs AMP	41,509.	154,751.
594 shs ADI	59,231.	97,434.
330 shs ELV	49,454.	169,280.
1568 shs AAPL	39,994.	203,730.
4455 shs AVTR	135,656.	93,956.
4643 shs BAC	82,188.	153,776.
624 shs BX	26,569.	46,295.
77 shs BKNG	87,045.	155,177.
742 shs BFAM	85,778.	46,820.
590 shs CNI	34,414.	70,139.
1453 shs KMX	64,144.	88,473.
2553 shs CARR	55,081.	105,311.
1973 shs EW	59,648.	147,206.
833 shs META	103,977.	100,243.
143 shs FCNCA	107,755.	108,445.
584 shs FISV	57,743.	59,025.
270 shs INTU	72,458.	105,089.
409 shs LOW	27,154.	81,489.
859 shs MA	85,777.	298,700.
774 shs MRK	46,587.	85,875.
1508 shs MSFT	113,157.	361,649.
297 shs NFLX	68,545.	87,579.
906 shs OTIS	51,884.	70,949.
1878 shs PINS	105,083.	45,597.
1627 shs SCHW	111,178.	135,464.

1258 shs TJX	62,292.	100,136.
660 shs TMUS	84,589.	92,400.
1687 shs TSM	106,778.	125,665.
341 shs URI	17,986.	121,198.
500 shs UNH	109,551.	265,090.
1451 shs V	115,052.	301,460.
296 shs SBAC	50,986.	82,972.
1959 shs XBI	158,522.	162,597.
335 shs BHVN	4,511.	4,650.
1345 shs ESTA	93,663.	88,299.
4263 shs G	189,454.	197,462.
2808 shs MMYT	73,863.	77,417.
4821 shs ABCM	82,500.	75,015.
8901 shs ANGI	66,312.	20,917.
4507 shs ACCD	59,824.	35,110.
3521 shs AGL	89,575.	56,829.
3214 shs ALHC	47,331.	37,797.
373 shs ARVN	17,182.	12,761.
376 shs ASND	43,864.	45,921.
1665 shs AZEK	56,609.	33,833.
1271 shs BSY	42,928.	46,976.
1364 shs BL	114,242.	91,756.
549 shs BPMC	45,894.	24,052.
2010 shs BFAM	203,807.	126,831.
1391 shs AZTA	87,855.	80,984.
1314 shs BRKR	87,673.	89,812.
351 shs CWST	25,354.	27,838.
125 shs CRL	37,247.	27,238.
593 shs CHH	72,169.	66,796.
1052 shs CCOI	67,576.	60,048.
2681 shs DT	116,095.	102,682.
3486 shs EVOP	94,584.	117,966.
1406 shs EHC	85,172.	84,093.
1109 shs ENTG	111,635.	72,739.
1230 shs ENV	84,230.	75,891.
398 shs FCNCA	59,371.	63,202.
603 shs FATE	22,678.	6,084.
1573 shs FUL	108,010.	112,658.
1671 shs HQY	108,424.	103,000.
1103 shs IAA	41,457.	44,120.
164 shs IEX	36,005.	37,446.
1000 shs NARI	78,641.	63,560.
10110 shs INFN	80,762.	68,141.
619 shs JBT	73,298.	56,533.
228 shs KRTX	44,177.	44,802.
620 shs KNX	30,991.	32,494.
611 shs LSCC	34,182.	39,642.
2219 shs LESL	44,721.	27,094.
268 shs LFUS	69,222.	59,014.
615 shs MSA	86,989.	88,677.
7591 shs MCW	76,472.	70,065.
5470 shs NEO	132,041.	50,543.
953 shs NBIX	93,205.	113,826.
426 shs NVRO	32,613.	16,870.

1370 shs KIDS	66,724.	54,430.
2724 shs PHR	84,059.	88,149.
3651 shs PINS	86,116.	88,646.
846 shs POWI	68,984.	60,675.
1958 shs PRO	68,634.	47,501.
2294 shs PB	168,631.	166,728.
529 shs KWR	109,992.	88,290.
2052 shs RTO	82,408.	63,222.
3386 shs SIBN	71,313.	46,050.
1714 shs SMPL	61,761.	65,183.
187 shs SITE	30,954.	21,939.
1525 shs SUMO	18,897.	12,353.
385 shs TTWO	48,160.	40,090.
211 shs BLD	45,015.	33,019.
251 shs VMI	64,436.	82,998.
3398 shs VZIO	29,604.	25,179.
1543 shs WCN	197,114.	204,540.
509 shs WEX	94,490.	83,298.
742 shs WWD	80,728.	71,685.
1397 shs WK	134,620.	117,306.
144 shs XPEL	8,879.	8,649.
2755 shs ZWS	88,504.	58,268.
2121 shs ZUO	32,775.	13,490.
1659 shs DBRG	41,293.	18,149.
580 shs EGP	93,593.	85,875.
495 shs HELE	103,464.	54,900.
366 shs ALRS	8,418.	8,546.
2960 shs AMAL	66,547.	68,198.
952 shs AIZ	141,855.	119,057.
3307 shs TBBK	81,667.	93,853.
639 shs CRAI	49,113.	78,233.
4153 shs CTS	143,347.	163,711.
186 shs CABO	138,300.	132,406.
365 shs CCF	33,783.	31,485.
916 shs CVEO	20,789.	28,488.
932 shs FIX	74,786.	107,255.
1699 shs CULP	18,544.	7,798.
2444 shs DCOM	85,131.	77,793.
1526 shs EXP	207,270.	202,729.
8460 shs EBC	172,801.	145,935.
3589 shs SATS	87,182.	59,865.
3369 shs FSS	121,273.	156,557.
1566 shs FBNC	71,076.	67,087.
865 shs THG	121,897.	116,887.
2044 shs NGVT	149,938.	143,979.
4774 shs IMXI	115,086.	116,342.
461 shs KAI	84,493.	81,887.
5111 shs LZB	175,938.	116,633.
10710 shs MTG	149,289.	139,230.
7229 shs MWA	98,583.	77,784.
3076 shs NCR	71,222.	72,009.
1053 shs NXST	164,578.	184,307.
1704 shs ONTO	123,052.	116,025.
4338 shs OMI	182,354.	84,721.

525 shs CNXN	25,032.	24,623.
5277 shs PPBI	198,948.	166,542.
4776 shs PDCO	145,695.	133,871.
1783 shs PGC	57,878.	66,363.
2351 shs POR	127,605.	115,199.
2567 shs PFC	75,557.	69,232.
757 shs PRI	112,852.	107,357.
1086 shs SPXC	54,800.	71,296.
3591 shs SFM	96,955.	116,241.
4031 shs SGU	44,097.	48,574.
2962 shs THR	52,904.	59,477.
2386 shs THS	89,609.	117,821.
1910 shs UMBF	172,728.	159,523.
3385 shs UNFI	136,201.	131,033.
481 shs VRTS	112,731.	92,083.
2603 shs WSFS	128,519.	118,020.
8011 shs WOW	155,106.	72,980.
1151 shs CTO	22,107.	21,040.
682 shs EGP	120,936.	100,977.
4968 shs EPRT	128,985.	116,599.
2815 shs GTY	83,602.	95,288.
3829 shs GMRE	60,405.	36,299.
13641 shs LADR	159,502.	136,956.
1172 shs AKAM	114,909.	98,800.
1228 shs AXP	228,352.	181,437.
905 shs AWK	125,289.	137,940.
349 shs AMP	103,249.	108,668.
781 shs AMGN	192,884.	205,122.
3342 shs CARR	146,415.	137,858.
1635 shs CIEN	95,154.	83,352.
1264 shs CL	102,469.	99,591.
1590 shs ED	151,851.	151,543.
736 shs CMI	151,874.	178,325.
194 shs DE	79,601.	83,179.
974 shs EMR	90,854.	93,562.
1761 shs ES	155,291.	147,642.
985 shs FIX	104,400.	66,832.
4419 shs FITB	193,986.	144,987.
2688 shs GILD	166,489.	230,765.
2094 shs HOLX	143,443.	156,652.
1364 shs IFF	155,368.	143,002.
7760 shs KEY	153,774.	135,179.
1446 shs LKQ	67,600.	77,231.
4167 shs MRK	340,100.	462,329.
2778 shs MET	182,596.	201,044.
2042 shs MU	158,615.	102,059.
1861 shs MS	155,352.	158,222.
2393 shs ORCL	185,377.	195,604.
2696 shs OGN	92,314.	75,299.
829 shs OC	73,021.	70,714.
1183 shs PNC	228,751.	186,843.
1751 shs PG	267,815.	265,382.
1001 shs DGX	144,959.	156,596.
202 shs REGN	133,656.	145,741.

2094 shs HSIC	179,463.	167,248.
4111 shs SFM	127,757.	133,074.
940 shs STLD	58,471.	91,838.
1766 shs TJX	114,870.	140,574.
459 shs TGT	101,295.	68,409.
3376 shs USB	180,679.	147,227.
393 shs UPS	78,574.	68,319.
499 shs URI	161,277.	177,355.
3827 shs UNM	115,971.	157,022.
301 shs VMI	68,169.	99,532.
6495 shs VZ	342,769.	255,903.
452 shs VRTX	124,099.	130,529.
1098 shs VMW	131,487.	134,790.
1551 shs WAB	139,268.	154,805.
2353 shs WY	95,826.	72,943.
1310 shs ZBH	154,302.	167,025.
586 shs ARE	114,625.	85,363.
499 shs CCI	93,096.	67,684.
3250 shs HASI	142,410.	94,185.
6956 shs KIM	169,492.	147,328.
<b>Total to Form 990-PF, Part II, line 10b</b>	<b>32,359,904.</b>	<b>34,247,990.</b>

Form 990-PF	Corporate Bonds	Statement	14
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Description	Book Value	Fair Market Value
120000 shs BANK NOVA SCOTIA (CUSIP: 0641596E1)	116,117.	111,840.
95000 shs T-MOBILE (CUSIP: 85207UAJ4)	97,975.	98,071.
320000 shs INTERNATIONAL BANK (CUSIP: 459058JB0)	322,909.	293,952.
655000 shs COUNCIL EUROPE DEV BK (CUSIP: 222213BA7)	648,160.	632,403.
120000 shs MORGAN STANLEY (CUSIP: 6174468R3)	115,625.	110,098.
118000 shs FORTIS (CUSIP: 349553AM9)	119,233.	109,456.
115000 shs NXP B V / NXP (CUSIP: 62954HBE7)	114,810.	110,280.
110000 shs CVS HEALTH CORP (CUSIP: 126650CX6)	120,923.	106,396.
110000 shs MARVELL TECHNOLOGY (CUSIP: 573874AN4)	116,709.	104,843.
130000 shs VMWARE INC (CUSIP: 928563AK1)	119,663.	106,155.
105000 shs AT&T INC (CUSIP: 00206RHJ4)	97,707.	99,852.
620000 shs ASIAN DEVELOPMENT BANK (CUSIP: 045167FL2)	577,674.	544,095.
60000 shs EUROPEAN INVT BK (CUSIP: 298785JR8)	54,962.	52,503.
35000 shs ORACLE CORP (CUSIP: 68389XCH6)	34,967.	36,329.
125000 shs EQUINIX INC (CUSIP: 29444UBE5)	119,692.	108,803.
125000 shs AMPHENOL CORP (CUSIP: 032095AJ0)	121,251.	106,695.
60000 shs CONSOLIDATED EDISON CO (CUSIP: 209111FX6)	58,728.	53,962.
125000 shs CROWN CASTLE INC (CUSIP: 22822VAR2)	118,138.	109,349.
105000 shs ALEXANDRIA REAL ESTATE (CUSIP: 015271AU3)	115,978.	102,293.

132000 shs XYLEM INC (CUSIP: 98419MAL4)	123,562.	107,078.
70000 shs ROPER TECHNOLOGIES (CUSIP: 776743AL0)	51,453.	53,926.
135000 shs PERKINELMER INC (CUSIP: 714046AN9)	121,666.	105,777.
130000 shs PHYSICIANS RLTY LP (CUSIP: 71951QAC6)	118,874.	101,470.
65000 shs FORD MTR (CUSIP: 345370DA5)	58,579.	48,746.
130000 shs APTIV PLC (CUSIP: 00217GAB9)	116,940.	106,794.
365000 shs INTERNATIONAL FIN CORP (CUSIP: 45950KCS7)	360,124.	362,044.
300000 shs INTER-AMERICAN DEV (CUSIP: 4581X0DM7)	294,937.	295,128.
60000 shs TRIMBLE INC (CUSIP: 896239AB6)	60,275.	59,583.
60000 shs KROGER NOTE (CUSIP: 501044CS8)	60,349.	59,496.
60000 shs AMERICAN EXPRESS (CUSIP: 025816CC1)	60,361.	58,937.
60000 shs HUNT JB TRANS (CUSIP: 445658CD7)	60,456.	58,969.
60000 shs CITI GROUP (CUSIP: 172967MR9)	59,303.	59,150.
65000 shs BANK NOVA SCOTIA (CUSIP: 0641596E1)	61,435.	60,580.
60000 shs JP MORGAN CHASE & CO (CUSIP: 46647PBS4)	58,330.	57,861.
300000 shs EUROPEAN INVESTMENT BANK (CUSIP: 298785GQ3)	298,818.	290,925.
60000 shs KEYSIGHT TECHNOLOGIES (CUSIP: 49338LAB9)	61,216.	59,080.
60000 shs APTIV PLC (CUSIP: 00217GAA1)	58,197.	56,619.
60000 shs DISNEY WALT CO (CUSIP: 254687FN1)	60,307.	58,115.
30000 shs NIKE INC (CUSIP: 654106AH6)	29,508.	28,654.
60000 shs ANALOG DEVICES (CUSIP: 032654AS4)	59,882.	57,707.
60000 shs VF CORP (CUSIP: 918204BA5)	58,790.	56,322.
60000 shs COUNCIL EUROPE DEV BK (CUSIP: 222213BA7)	59,870.	57,930.
65000 shs AMERICAN TOWER (CUSIP: 03027XBB5)	60,113.	58,674.
65000 shs BK OF AMERICA (CUSIP: 06051GKE8)	61,618.	59,950.
65000 shs UNITEDHEALTH GROUP (CUSIP: 91324PDW9)	60,564.	58,906.
65000 shs GOLDMAN SACHS GROUP (CUSIP: 38141GXS8)	59,795.	58,774.
100000 shs ROYAL BK CDA (CUSIP: 78016EZT7)	90,594.	87,370.
<b>Total to Form 990-PF, Part II, line 10c</b>	<b>5,877,137.</b>	<b>5,581,940.</b>

Form 990-PF	Mortgage Loans	Statement 15
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Description	Book Value	Fair Market Value
90000 shs FEDL HOME LN MTG (CUSIP: 3137BSPW7)	85,161.	81,436.
50000 shs JOHN DEERE OWNER TR SER (CUSIP: 477870AC3)	0.	117.
60000 shs FEDL HOME LN MTG (CUSIP: 3137BHCY1)	50,824.	47,850.
50000 shs TOYOTA AUTO REC OWN SER (CUSIP: 89190GAC1)	49,995.	48,076.
400000 shs FEDL NATL MTG ASSN POOL (CUSIP: 3138LKU70)	390,875.	371,352.
124000 shs VERIZON MASTER TR SER (CUSIP: 92348KBC6)	123,978.	124,672.

50000 shs CNH EQUIP TR (CUSIP: 12657WAE0)	49,998.	44,120.
312000 shs FED NATL MTG ASSN POOL (CUSIP: 3138L6D47)	286,679.	271,092.
45000 shs FEDL HOME LN MTG CRP POOL (CUSIP: 3132WWX98)	43,438.	36,059.
200000 shs FED NATL MTG ASSN POOL (CUSIP: 31383LNKS9)	199,719.	184,912.
105000 shs FED NATL MTG ASSN POOL (CUSIP: 3138LNP88)	102,727.	98,384.
115000 shs FED NATL MTG ASSN POOL (CUSIP: 36179VAL4)	33,590.	30,564.
550000 shs FED NATL MTG ASSN SER (CUSIP: 38379HTQ8)	107,669.	103,159.
250000 shs FED NATL MTG ASSN POOL (CUSIP: 36178D2K6)	65,975.	58,015.
160000 shs FED NATL MTG ASSN POOL (CUSIP: 3622A3AG5)	44,628.	42,075.
110000 shs FED NATL MTG ASSN SER (CUSIP: 38382LDA6)	28,180.	22,812.
50000 shs FED NATL MTG ASSN SER (CUSIP: 38382WT80)	35,347.	29,525.
50000 shs FED NATL MTG ASSN SER (CUSIP: 38382RNR5)	29,640.	22,953.
65000 shs FED NATL MTG ASSN POOL (CUSIP: 3617QYQF5)	41,192.	40,375.
140000 shs UNIFORM MBS POOL (CUSIP: 3140XBGG9)	106,146.	105,770.
150000 shs UNIFORM MBS POOL (CUSIP: 3140XCL63)	111,126.	110,971.
40000 shs UNIFORM MBS POOL (CUSIP: 3132DMZE8)	29,534.	28,771.
80000 shs UNIFORM MBS POOL (CUSIP: 3140QMRB2)	59,729.	60,979.
60000 shs UNIFORM MBS POOL (CUSIP: 3140XFPJ4)	48,215.	48,037.
80000 shs UNIFORM MBS POOL (CUSIP: 3133B3G76)	63,817.	65,408.
280000 shs UNIFORM MBS POOL (CUSIP: 3133B4M44)	228,795.	227,376.
125000 shs UNIFORM MBS POOL (CUSIP: 3140XFQ53)	100,655.	97,734.
90000 shs UNIFORM MBS POOL (CUSIP: 38383FV59)	80,839.	73,981.
320000 shs UNIFORM MBS POOL (CUSIP: 3140QNL1)	250,780.	251,080.
45000 shs UNIFORM MBS POOL (CUSIP: 3140QNL26)	37,531.	37,389.
130000 shs UNIFORM MBS POOL (CUSIP: 3140QNNV0)	104,973.	105,694.
115000 shs UNIFORM MBS POOL (CUSIP: 3140MHUX5)	96,321.	96,394.
120000 shs UNIFORM MBS POOL (CUSIP: 3140XGGF0)	103,028.	101,830.
200000 shs UNIFORM MBS POOL (CUSIP: 3140XH5F5)	165,471.	165,691.
200000 shs GOVT NATL MTG ASSN POOL (CUSIP: 36179W3B2)	205,814.	196,785.
235000 shs UNIFORM MBS POOL (CUSIP: 3140MGQQ7)	202,233.	198,746.
200000 shs GOVT NATL MTG ASSN POOL (CUSIP: 36179W5B0)	167,650.	167,308.
215000 shs GOVT NATL MTG ASSN POOL (CUSIP: 36179XAB2)	214,179.	209,532.
115000 shs UNIFORM MBS POOL (CUSIP: 3140MRBN6)	111,649.	111,877.
100000 shs UNIFORM MBS POOL (CUSIP: 3140MYAG7)	97,512.	97,074.
75000 shs UNIFORM MBS POOL (CUSIP: 3133BMRM9)	73,930.	74,894.
100000 shs GOVT NATL MTG ASSN SER (CUSIP: 38381DFG0)	89,166.	72,098.
115000 shs FEDL NATL MTG ASSN SER (CUSIP: 3136AY6X6)	106,562.	101,091.

70000 shs VERIZON MASTER TR SER (CUSIP: 92348KBC6)	69,988.	70,380.
150000 shs FEDL NATL MTG ASSN POOL (CUSIP: 3138L2JW8)	89,271.	84,344.
60000 shs FEDL NATL MTG ASSN SER (CUSIP: 3136B0YM2)	56,471.	53,300.
215000 shs FEDL NATL MTG ASSN SER (CUSIP: 3136B1XJ8)	190,900.	179,342.
200000 shs GOVT NATL MTG ASSN SER (CUSIP: 38374TAY0)	159,527.	151,926.
441000 shs GOVT NATL MTG ASSN SER (CUSIP: 38379HTQ8)	86,331.	82,715.
Total to Form 990-PF, Part II, line 12	5,277,758.	5,086,065.

Form 990-PF	Other Investments	Statement 16
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Description	Valuation Method	Book Value	Fair Market Value
Generation IM Global	COST	5,000,000.	3,914,042.
Capital Global Equity	COST	5,026,344.	3,723,814.
Susquehanna Pfaltzgraff Co.	COST	26,115.	31,027.
Total to Form 990-PF, Part II, line 13		10,052,459.	7,668,883.

Form 990-PF	Other Assets	Statement 17
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Description	Beginning of Yr Book Value	End of Year Book Value	Fair Market Value
Life Insurance Cash Surrender Value	37,762.	0.	0.
Prepaid Taxes	98,694.	85,764.	85,764.
Due from/(to) Affiliated Organizations	-3,850.	-6,213.	-6,213.
Deposits in Transit, per Book (net)	0.	17,586.	17,586.
To Form 990-PF, Part II, line 15	132,606.	97,137.	97,137.



Form 990-PF	Other Liabilities	Statement	18
<u>Description</u>		<u>BOY Amount</u>	<u>EOY Amount</u>
Accrued Excise Taxes		87,000.	62,260.
SIMPLE Match Obligations		8,452.	7,795.
Total to Form 990-PF, Part II, line 22		<u>95,452.</u>	<u>70,055.</u>

Form 990-PF	Summary of Direct Charitable Activities	Statement	19
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Activity One

The Foundation continued its mission to research, preserve, and promote the culture, history, art, and literature of indigenous peoples. The Foundation's work contributes to a world renowned archive of oral literature and traditional ecological knowledge, forwarding anthropological and traditional ecological knowledge and research. The collective efforts of the Foundation increases our understanding of the human conditions, enlarges our understanding of the impact of modern society on indigenous peoples, and increases our understanding of the interrelationship between all human societies and their environments. The Foundation publishes and disseminates the results of its research, and circulates educational material online through its own and affiliate websites, which is generally free of charge and available to the general public. The Foundation also engages in direct research and expeditions to broaden our understanding of indigenous cultures, communities, and traditions.

Expenses

To Form 990-PF, Part VIII-A, line 1

636,059.

Form 990-PF

Grant Application Submission Information  
Part XIV, Lines 2a through 2d

Statement 20

Name and Address of Person to Whom Applications Should be Submitted

Firebird Foundation for Anthropological Research  
P.O. Box A  
Phillips, ME 04966

<u>Telephone Number</u>	<u>Name of Grant Program</u>
(207) 639-3939	Firebird Fellowships

Email Address

firebird@firebirdfoundation.org

Form and Content of Applications

The Foundation provides fellowships to enable anthropologists, linguists, and other scholars, as well as individuals or teams of local researchers in indigenous societies, to collect and preserve these unique oral traditions. Fellows are encouraged, where possible, to foster the development of local teams of collectors to continue the work of recording traditional literature, language, and ecological knowledge. Transcriptions of the recordings are encouraged. There is no application form. Applicants are asked to submit a proposal with a budget by email to address noted above. Applications are accepted on a continuous basis and grants are awarded quarterly. The primary selection criteria are the importance of collecting oral literature among the society in which the applicant will be working, the methods to be used, the goals to be achieved, and the urgency of the project.

Any Submission Deadlines

None

Restrictions and Limitations on Awards

Anyone engaged in the documentation of threatened oral literature and traditional ecological knowledge may apply for a fellowship. Specific academic credentials are not required, but academic credentials are taken into consideration. Fellowships are currently awarded by the Foundations board. Foundation directors and members of the selection committee are ineligible to receive grants, as are their family members; certain descendants and family members of George N. Appell and Laura W.R. Appell are also ineligible. The terms and conditions of each fellowship are set forth in a letter sent to the grant recipient. The Foundation must receive a current report for each fellowship of the progress made and use of grant funds at least annually, and a final report on the results of the grantees research with an accounting for the funds expended.