

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

Return of Private Foundation
or Section 4947(a)(1) Trust Treated as Private Foundation
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 ▶ 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 01-01-2022, and ending 12-31-2022

| | | | |
|--|--|---|--|
| Name of foundation YOUNG THOMAS TA - IRREV | | A Employer identification number 31-6664108 | |
| Number and street (or P.O. box number if mail is not delivered to street address) 116 ALLEGHENY CENTER MALL P8YB3502L | | B Telephone number (see instructions) (412) 807-5594 | |
| City or town, state or province, country, and ZIP or foreign postal code PITTSBURGH, PA 15212 | | C If exemption application is pending, check here <input type="checkbox"/> | |
| G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change | | D 1. Foreign organizations, check here..... <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation ... <input type="checkbox"/> | |
| H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation | | E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> | |
| I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ <u>124,601</u> | | J Accounting method: <input type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ <i>(Part I, column (d) must be on cash basis.)</i> | |
| | | F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/> | |

| Part I Analysis of Revenue and Expenses <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)</i> | | (a) Revenue and expenses per books | (b) Net investment income | (c) Adjusted net income | (d) Disbursements for charitable purposes (cash basis only) |
|---|--|------------------------------------|---------------------------|-------------------------|---|
| Revenue | 1 Contributions, gifts, grants, etc., received (attach schedule) | | | | |
| | 2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B | | | | |
| | 3 Interest on savings and temporary cash investments | | | | |
| | 4 Dividends and interest from securities | 3,010 | 2,962 | | |
| | 5a Gross rents | | | | |
| | b Net rental income or (loss) | | | | |
| | 6a Net gain or (loss) from sale of assets not on line 10 | -426 | | | |
| | b Gross sales price for all assets on line 6a <u>39,921</u> | | | | |
| | 7 Capital gain net income (from Part IV, line 2) | | | 0 | |
| | 8 Net short-term capital gain | | | 0 | |
| | 9 Income modifications | | | | |
| | 10a Gross sales less returns and allowances | | | | |
| b Less: Cost of goods sold | | | | | |
| c Gross profit or (loss) (attach schedule) | | | | | |
| 11 Other income (attach schedule) | | | | | |
| 12 Total. Add lines 1 through 11 | 2,584 | 2,962 | | | |
| Operating and Administrative Expenses | 13 Compensation of officers, directors, trustees, etc. | 1,957 | 979 | | 978 |
| | 14 Other employee salaries and wages | | 0 | 0 | 0 |
| | 15 Pension plans, employee benefits | | 0 | 0 | |
| | 16a Legal fees (attach schedule) | | | | 0 |
| | b Accounting fees (attach schedule) | | | | |
| | c Other professional fees (attach schedule) | | | | 0 |
| | 17 Interest | | | | 0 |
| | 18 Taxes (attach schedule) (see instructions) | 150 | 28 | | 0 |
| | 19 Depreciation (attach schedule) and depletion | 0 | 0 | | |
| | 20 Occupancy | | | | |
| | 21 Travel, conferences, and meetings | | 0 | 0 | |
| | 22 Printing and publications | | 0 | 0 | |
| | 23 Other expenses (attach schedule) | 100 | | | 100 |
| | 24 Total operating and administrative expenses. Add lines 13 through 23 | 2,207 | 1,007 | 0 | 1,078 |
| | 25 Contributions, gifts, grants paid | 13,660 | | | 13,660 |
| 26 Total expenses and disbursements. Add lines 24 and 25 | 15,867 | 1,007 | 0 | 14,738 | |
| 27 Subtract line 26 from line 12: | | | | | |
| a Excess of revenue over expenses and disbursements | -13,283 | | | | |
| b Net investment income (if negative, enter -0-) | | 1,955 | | | |
| c Adjusted net income (if negative, enter -0-) | | | 0 | | |

| Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.) | | Beginning of year | End of year | |
|--|--|-------------------|----------------|-----------------------|
| | | (a) Book Value | (b) Book Value | (c) Fair Market Value |
| Assets | 1 Cash—non-interest-bearing | | | |
| | 2 Savings and temporary cash investments | 11,727 | 13,277 | 13,277 |
| | 3 Accounts receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____ | | 0 | 0 |
| | 4 Pledges receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____ | | | |
| | 5 Grants receivable | | | |
| | 6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) | | | |
| | 7 Other notes and loans receivable (attach schedule) ▶ _____ Less: allowance for doubtful accounts ▶ _____ 0 | | | |
| | 8 Inventories for sale or use | | | |
| | 9 Prepaid expenses and deferred charges | | | |
| | 10a Investments—U.S. and state government obligations (attach schedule) | | | |
| | b Investments—corporate stock (attach schedule) | | | |
| | c Investments—corporate bonds (attach schedule) | | | |
| | 11 Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____ | | | |
| | 12 Investments—mortgage loans | | | |
| | 13 Investments—other (attach schedule) | 131,268 | 116,424 | 111,324 |
| | 14 Land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____ | | | |
| 15 Other assets (describe ▶ _____) | | | | |
| 16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I) | 142,995 | 129,701 | 124,601 | |
| Liabilities | 17 Accounts payable and accrued expenses | | | |
| | 18 Grants payable | | | |
| | 19 Deferred revenue | | | |
| | 20 Loans from officers, directors, trustees, and other disqualified persons | | | |
| | 21 Mortgages and other notes payable (attach schedule) | | | |
| | 22 Other liabilities (describe ▶ _____) | | | |
| | 23 Total liabilities (add lines 17 through 22) | | 0 | |
| Net Assets or Fund Balances | Foundations that follow FASB ASC 958, check here ▶ <input type="checkbox"/> and complete lines 24, 25, 29 and 30. | | | |
| | 24 Net assets without donor restrictions | | | |
| | 25 Net assets with donor restrictions | | | |
| | Foundations that do not follow FASB ASC 958, check here ▶ <input checked="" type="checkbox"/> and complete lines 26 through 30. | | | |
| | 26 Capital stock, trust principal, or current funds | 142,995 | 129,701 | |
| | 27 Paid-in or capital surplus, or land, bldg., and equipment fund | | | |
| | 28 Retained earnings, accumulated income, endowment, or other funds | | | |
| 29 Total net assets or fund balances (see instructions) | 142,995 | 129,701 | | |
| 30 Total liabilities and net assets/fund balances (see instructions) . | 142,995 | 129,701 | | |

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 | 142,995 |
| 2 Enter amount from Part I, line 27a | 2 | -13,283 |
| 3 Other increases not included in line 2 (itemize) ▶ _____ | 3 | 278 |
| 4 Add lines 1, 2, and 3 | 4 | 129,990 |
| 5 Decreases not included in line 2 (itemize) ▶ _____ | 5 | 289 |
| 6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29 . | 6 | 129,701 |

Part IV Capital Gains and Losses for Tax on Investment Income

| (a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.) | (b) How acquired P—Purchase D—Donation | (c) Date acquired (mo., day, yr.) | (d) Date sold (mo., day, yr.) |
|--|---|---|-------------------------------------|
| 1a See Additional Data Table | | | |
| b | | | |
| c | | | |
| d | | | |
| e | | | |

| (e) Gross sales price | (f) Depreciation allowed (or allowable) | (g) Cost or other basis plus expense of sale | (h) Gain or (loss) (e) plus (f) minus (g) |
|------------------------------------|---|--|---|
| a See Additional Data Table | | | |
| b | | | |
| c | | | |
| d | | | |
| e | | | |

| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 | | | (l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h)) |
|---|---|--|---|
| (i) F.M.V. as of 12/31/69 | (j) Adjusted basis as of 12/31/69 | (k) Excess of col. (i) over col. (j), if any | |
| a See Additional Data Table | | | |
| b | | | |
| 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 | -426 |
| 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 | |

| Part V Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), 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 | 27 |
| 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 | 27 |
| 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 | 27 |
| 6 | Credits/Payments: | | |
| a | 2022 estimated tax payments and 2021 overpayment credited to 2022 | 6a | 118 |
| b | Exempt foreign organizations—tax withheld at source | 6b | 0 |
| c | Tax paid with application for extension of time to file (Form 8868) | 6c | 0 |
| d | Backup withholding erroneously withheld | 6d | |
| 7 | Total credits and payments. Add lines 6a through 6d. | 7 | 118 |
| 8 | Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2221 is attached. | 8 | 0 |
| 9 | Tax due. If the total of lines 5 and 8 is more than line 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 | 91 |
| 11 | Enter the amount of line 10 to be: Credited to 2023 estimated tax ▶ 28 Refunded ▶ | 11 | 63 |

| 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? | 1a | No |
| b | Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition. <i>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.</i> | 1b | No |
| c | Did the foundation file Form 1120-POL for this year?. | 1c | No |
| d | Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ \$ _____ (2) On foundation managers. ▶ \$ _____ | | |
| e | Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ _____ | | |
| 2 | Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i> | 2 | No |
| 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? <i>If "Yes," attach a conformed copy of the changes</i> | 3 | No |
| 4a | Did the foundation have unrelated business gross income of \$1,000 or more during the year?. | 4a | No |
| b | If "Yes," has it filed a tax return on Form 990-T for this year?. | 4b | |
| 5 | Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i> | 5 | No |
| 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? | 6 | Yes |
| 7 | Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XIV.</i> | 7 | Yes |
| 8a | Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ OH _____ | | |
| b | 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? <i>If "No," attach explanation.</i>  | 8b | No |
| 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 taxable year beginning in 2022? See the instructions for Part XIII. If "Yes," complete Part XIII | 9 | No |
| 10 | Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i> | 10 | No |

Part VI-A Statements Regarding Activities (continued)

Table with 3 columns: Question number, Question text, and Yes/No columns. Rows 11-14.

Located at 116 ALLEGHENY CENTER MALL PITTSBURGH PA ZIP+4 15212

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here and enter the amount of tax-exempt interest received or accrued during the year 15

Table with 3 columns: Question number, Question text, and Yes/No columns. Row 16.

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.

Main table for Part VI-B with 3 columns: Question number, Question text, and Yes/No columns. Rows 1a-4b.

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

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

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

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

| (a) Name and address | (b) Title, and average hours per week devoted to position | (c) Compensation (If not paid, enter -0-) | (d) Contributions to employee benefit plans and deferred compensation | (e) Expense account, other allowances |
|---|---|---|---|---------------------------------------|
| PNC BANK N A 116 ALLEGHENY CENTER MALL PITTSBURGH, PA 15212 | TRUSTEE 1 | 1,957 | | |

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

| (a) Name and address of each employee paid more than \$50,000 | (b) Title, and average hours per week devoted to position | (c) Compensation | (d) Contributions to employee benefit plans and deferred compensation | (e) Expense account, other allowances |
|---|---|------------------|---|---------------------------------------|
| NONE | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |
| | | | | |

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

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

| 3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE". | | |
|---|---------------------|------------------|
| (a) Name and address of each person paid more than \$50,000 | (b) Type of service | (c) Compensation |
| NONE | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| Total number of others receiving over \$50,000 for professional services. ▶ | | 0 |

Part VIII-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 | |
| | |
| 2 | |
| | |
| 3 | |
| | |
| 4 | |
| | |

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

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

| 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 | 145,499 |
| b | Average of monthly cash balances. | 1b | 0 |
| c | Fair market value of all other assets (see instructions). | 1c | 0 |
| d | Total (add lines 1a, b, and c). | 1d | 145,499 |
| 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 | 145,499 |
| 4 | Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions). | 4 | 2,182 |
| 5 | Net value of noncharitable-use assets. Subtract line 4 from line 3.. . . . | 5 | 143,317 |
| 6 | Minimum investment return. Enter 5% (0.05) of line 5. | 6 | 7,166 |

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 | 7,166 |
| 2a | Tax on investment income for 2022 from Part V, line 5. | 2a | 27 |
| b | Income tax for 2022. (This does not include the tax from Part V.). | 2b | |
| c | Add lines 2a and 2b. | 2c | 27 |
| 3 | Distributable amount before adjustments. Subtract line 2c from line 1. | 3 | 7,139 |
| 4 | Recoveries of amounts treated as qualifying distributions. | 4 | 0 |
| 5 | Add lines 3 and 4. | 5 | 7,139 |
| 6 | Deduction from distributable amount (see instructions). | 6 | 0 |
| 7 | Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XII, line 1. | 7 | 7,139 |

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 | 14,738 |
| 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 | 0 |
| 3 | Amounts set aside for specific charitable projects that satisfy the: | | |
| a | Suitability test (prior IRS approval required). | 3a | 0 |
| b | Cash distribution test (attach the required schedule). | 3b | 0 |
| 4 | Qualifying distributions. Add lines 1a through 3b. Enter here and on Part XII, line 4.. . . . | 4 | 14,738 |

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 | | | | 7,139 |
| 2 Undistributed income, if any, as of the end of 2022: | | | | |
| a Enter amount for 2021 only. | | | 8,155 | |
| b Total for prior years: 2020, 20____, 20____ | | 5,505 | | |
| 3 Excess distributions carryover, if any, to 2022: | | | | |
| a From 2017. | 0 | | | |
| b From 2018. | 0 | | | |
| c From 2019. | 0 | | | |
| d From 2020. | 0 | | | |
| e From 2021. | 0 | | | |
| f Total of lines 3a through e. | 0 | | | |
| 4 Qualifying distributions for 2022 from Part XI, line 4: \$ <u>14,738</u> | | | | |
| a Applied to 2021, but not more than line 2a | | | 8,155 | |
| b Applied to undistributed income of prior years (Election required—see instructions). | | 5,505 | | |
| c Treated as distributions out of corpus (Election required—see instructions). | 0 | | | |
| d Applied to 2022 distributable amount. | | | | 1,078 |
| 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).) | 0 | | | 0 |
| 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 instructions. | | | 0 | |
| f Undistributed income for 2022. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2023. | | | | 6,061 |
| 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 (see instructions). | 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. | 0 | | | |
| b Excess from 2019. | 0 | | | |
| c Excess from 2020. | 0 | | | |
| d Excess from 2021. | 0 | | | |
| e Excess from 2022. | 0 | | | |

Part XIII Private Operating Foundations (see instructions and Part VI-A, question 9)

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2022, enter the date of the ruling ▶

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

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

| | Tax year | Prior 3 years | | | (e) Total |
|--|----------|---------------|----------|----------|-----------|
| | (a) 2022 | (b) 2021 | (c) 2020 | (d) 2019 | |
| b 85% (0.85) of line 2a | | | | | |
| c Qualifying distributions from Part XI, line 4 for each year listed | | | | | |
| d Amounts included in line 2c not used directly for active conduct of exempt activities | | | | | |
| e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c | | | | | |
| 3 Complete 3a, b, or c for the alternative test relied upon: | | | | | |
| a "Assets" alternative test—enter: | | | | | |
| (1) Value of all assets | | | | | |
| (2) Value of assets qualifying under section 4942(j)(3)(B)(i) | | | | | |
| b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part 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 | | | | | |
| (4) 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).)

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

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

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

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

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

c Any submission deadlines:

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

Part XIV **Supplementary Information** (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

| Recipient | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|---|---|--------------------------------|----------------------------------|--------|
| Name and address (home or business) | | | | |
| a <i>Paid during the year</i> See Additional Data Table | | | | |
| Total ▶ 3a | | | | |
| b <i>Approved for future payment</i> | | | | |
| Total ▶ 3b | | | | |

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income

| (a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.) | (b) How acquired P—Purchase D—Donation | (c) Date acquired (mo., day, yr.) | (d) Date sold (mo., day, yr.) |
|--|--|--------------------------------------|----------------------------------|
| 1 26.478 BAIRD AGGREGATE BOND FUND FD 72 | | 2020-08-26 | 2022-02-28 |
| 1 52.613 BLACKROCK CORE BOND PORTFOLIO CL INSTL FUND 332 | | 2021-08-23 | 2022-02-28 |
| 18. FIDELITY REAL ESTATE ETF ETF | | 2021-08-23 | 2022-02-28 |
| 46. FIDELITY REAL ESTATE ETF ETF | | 2020-04-28 | 2022-02-28 |
| 14.399 OAKMARK INTL SM CAP-R6 | | 2019-05-29 | 2022-02-28 |
| 2. ISHARES TR S&P 500 INDEX FD | | 2021-08-23 | 2022-02-28 |
| 3. ISHARES BARCLAYS 7-10 YR TREAS BOND ETF | | 2020-08-26 | 2022-02-28 |
| 6. ISHARES TR S&P SMLCAP 600 | | 2020-04-28 | 2022-02-28 |
| 2.037 MFS VALUE FUND-R6 | | 2013-01-11 | 2022-02-28 |
| 30.656 PIMCO INCOME FUND CLASS INS | | | 2022-02-28 |

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

| (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) |
|-----------------------|--|---|--|
| 290 | | 314 | -24 |
| 495 | | 524 | -29 |
| 551 | | 573 | -22 |
| 1,408 | | 1,049 | 359 |
| 263 | | 201 | 62 |
| 873 | | 898 | -25 |
| 335 | | 365 | -30 |
| 644 | | 376 | 268 |
| 104 | | 54 | 50 |
| 351 | | 368 | -17 |

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 | | | (l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h)) |
|---|-----------------------------------|--|--|
| (i) F.M.V. as of 12/31/69 | (j) Adjusted basis as of 12/31/69 | (k) Excess of col. (i) over col. (j), if any | |
| | | | -24 |
| | | | -29 |
| | | | -22 |
| | | | 359 |
| | | | 62 |
| | | | -25 |
| | | | -30 |
| | | | 268 |
| | | | 50 |
| | | | -17 |

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income

| (a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.) | (b) How acquired P—Purchase D—Donation | (c) Date acquired (mo., day, yr.) | (d) Date sold (mo., day, yr.) |
|--|--|--------------------------------------|----------------------------------|
| 18.636 T ROWE PR GROWTH STOCK-I | | 2013-01-07 | 2022-02-28 |
| 1 23.667 WESTERN ASSET CORE PLUS BOND FUND CLASS IS | | | 2022-02-28 |
| 45. WISDOMTREE U.S. QUALITY DIVI ETF | | 2020-08-26 | 2022-02-28 |
| 1.891 CAMBIAR INTL EQUITY FUND-INS | | 2022-02-28 | 2022-09-16 |
| 85.918 CAMBIAR INTL EQUITY FUND-INS | | | 2022-09-16 |
| 85.341 SEAFARER OVERSEAS GROWTH & INCOME INSTL CLASS | | | 2022-09-16 |
| 1.365 TOUCHSTONE SANDS EM GR-R6 | | 2022-02-28 | 2022-09-16 |
| 54.69 TOUCHSTONE SANDS EM GR-R6 | | | 2022-09-16 |
| 16.34 BAIRD MIDCAP INST | | 2022-02-28 | 2022-10-19 |
| 1. ISHARES TR S&P SMLCAP 600 | | 2020-04-28 | 2022-10-19 |

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

| (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) |
|-----------------------|--|---|--|
| 1,675 | | 724 | 951 |
| 266 | | 298 | -32 |
| 2,776 | | 2,261 | 515 |
| 39 | | 48 | -9 |
| 1,790 | | 2,178 | -388 |
| 962 | | 1,274 | -312 |
| 18 | | 23 | -5 |
| 720 | | 1,180 | -460 |
| 332 | | 404 | -72 |
| 91 | | 63 | 28 |

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 | | | (l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h)) |
|---|-----------------------------------|--|--|
| (i) F.M.V. as of 12/31/69 | (j) Adjusted basis as of 12/31/69 | (k) Excess of col. (i) over col. (j), if any | |
| | | | 951 |
| | | | -32 |
| | | | 515 |
| | | | -9 |
| | | | -388 |
| | | | -312 |
| | | | -5 |
| | | | -460 |
| | | | -72 |
| | | | 28 |

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income

| List and describe the kind(s) of property sold (e.g., real estate, (a) 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.) |
|--|--|--|--|
| 7. ISHARES CORE MSCI EAFE ETF ETF | | 2022-02-28 | 2022-10-19 |
| 1 68. ISHARES CORE MSCI EAFE ETF ETF | | | 2022-10-19 |
| 2.761 JENSEN QUALITY GROWTH-Y | | 2022-02-28 | 2022-10-19 |
| 2.329 JENSEN QUALITY GROWTH-Y | | 2019-03-28 | 2022-10-19 |
| 11.264 LONGLEAF PARTNERS FDS TR INTL FD | | 2021-03-23 | 2022-10-19 |
| 6.52 MFS VALUE FUND-R6 | | 2013-01-11 | 2022-10-19 |
| 38.199 PIMCO INCOME FUND CLASS INS | | | 2022-10-19 |
| 29.67 T ROWE PR GROWTH STOCK-I | | 2013-01-07 | 2022-10-19 |
| .997 PRINCIPAL MIDCAP FUND-R6 | | 2022-02-28 | 2022-10-19 |
| 5.749 T ROWE PRICE VALUE FUND-I | | 2022-02-28 | 2022-10-19 |

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

| (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) |
|------------------------------|---|--|---|
| 376 | | 487 | -111 |
| 3,648 | | 4,069 | -421 |
| 146 | | 166 | -20 |
| 123 | | 115 | 8 |
| 133 | | 210 | -77 |
| 300 | | 172 | 128 |
| 389 | | 444 | -55 |
| 1,954 | | 1,152 | 802 |
| 30 | | 36 | -6 |
| 227 | | 258 | -31 |

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 | | | (l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h)) |
|---|---|--|---|
| (i) F.M.V. as of 12/31/69 | (j) Adjusted basis as of 12/31/69 | (k) Excess of col. (i) over col. (j), if any | |
| | | | -111 |
| | | | -421 |
| | | | -20 |
| | | | 8 |
| | | | -77 |
| | | | 128 |
| | | | -55 |
| | | | 802 |
| | | | -6 |
| | | | -31 |

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income

| List and describe the kind(s) of property sold (e.g., real estate, (a) 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.) |
|--|--|--|--|
| 10.346 TRIBUTARY SMALL COMPANY FD INST PLUS FD 1705 | | 2022-02-28 | 2022-10-19 |
| 1 587.851 WESTERN ASSET CORE PLUS BOND FUND CLASS IS | | | 2022-10-19 |
| 21.633 PZENA EMERG MKTS VALUE-INST | | 2022-09-16 | 2022-11-21 |
| 10.385 BAIRD MIDCAP INST | | 2022-02-28 | 2022-11-21 |
| 65.824 BAIRD AGGREGATE BOND FUND FD 72 | | | 2022-11-21 |
| 157.578 BLACKROCK CORE BOND PORTFOLIO CL INSTL FUND 332 | | | 2022-11-21 |
| 7. FIDELITY REAL ESTATE ETF ETF | | 2022-10-19 | 2022-11-21 |
| 3. FIDELITY REAL ESTATE ETF ETF | | 2020-04-28 | 2022-11-21 |
| 24.899 SEAFARER OVERSEAS GROWTH & INCOME INSTL CLASS | | 2021-03-23 | 2022-11-21 |
| 23.507 OAKMARK INTL SM CAP-R6 | | 2019-05-29 | 2022-11-21 |

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

| (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) |
|------------------------------|---|--|---|
| 300 | | 333 | -33 |
| 5,238 | | 7,163 | -1,925 |
| 225 | | 225 | |
| 229 | | 257 | -28 |
| 629 | | 780 | -151 |
| 1,289 | | 1,543 | -254 |
| 178 | | 164 | 14 |
| 76 | | 68 | 8 |
| 285 | | 371 | -86 |
| 378 | | 328 | 50 |

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 | | | (l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h)) |
|---|---|--|---|
| (i) F.M.V. as of 12/31/69 | (j) Adjusted basis as of 12/31/69 | (k) Excess of col. (i) over col. (j), if any | |
| | | | -33 |
| | | | -1,925 |
| | | | -28 |
| | | | -151 |
| | | | -254 |
| | | | 14 |
| | | | 8 |
| | | | -86 |
| | | | 50 |

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income

| List and describe the kind(s) of property sold (e.g., real estate, (a) 2-story brick warehouse; or common stock, 200 shs. MLC Co.) | (b) How acquired P—Purchase D—Donation | (c) Date acquired (mo., day, yr.) | (d) Date sold (mo., day, yr.) |
|--|--|--|--|
| 1. INVESCO QQQ TRUST ETF | | 2020-08-26 | 2022-11-21 |
| 1 27.695 WCM FOCUSED INTL GROWTH-INS | | | 2022-11-21 |
| 4. ISHARES TR S&P 500 INDEX FD | | 2022-10-19 | 2022-11-21 |
| 6. ISHARES BARCLAYS 7-10 YR TREAS BOND ETF | | 2020-08-26 | 2022-11-21 |
| 2. ISHARES TR S&P SMLCAP 600 | | 2020-04-28 | 2022-11-21 |
| 7. ISHARES MSCI EAFE VALUE ETF | | 2022-09-16 | 2022-11-21 |
| 9.561 JENSEN QUALITY GROWTH-Y | | 2019-03-28 | 2022-11-21 |
| 15.938 LAZARD US CONCENTRATED-INST | | 2022-02-28 | 2022-11-21 |
| 18.649 LONGLEAF PARTNERS FDS TR INTL FD | | 2021-03-23 | 2022-11-21 |
| 9.569 MFS VALUE FUND-R6 | | 2013-01-11 | 2022-11-21 |

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

| (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) |
|------------------------------|---|--|---|
| 282 | | 289 | -7 |
| 549 | | 604 | -55 |
| 1,583 | | 1,482 | 101 |
| 578 | | 729 | -151 |
| 198 | | 125 | 73 |
| 311 | | 294 | 17 |
| 540 | | 471 | 69 |
| 254 | | 287 | -33 |
| 247 | | 348 | -101 |
| 486 | | 252 | 234 |

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 | | | (l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h)) |
|---|---|--|---|
| (i) F.M.V. as of 12/31/69 | (j) Adjusted basis as of 12/31/69 | (k) Excess of col. (i) over col. (j), if any | |
| | | | -7 |
| | | | -55 |
| | | | 101 |
| | | | -151 |
| | | | 73 |
| | | | 17 |
| | | | 69 |
| | | | -33 |
| | | | -101 |
| | | | 234 |

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income

| (a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.) | (b) How acquired P—Purchase D—Donation | (c) Date acquired (mo., day, yr.) | (d) Date sold (mo., day, yr.) |
|--|--|--------------------------------------|----------------------------------|
| 22.796 NUANCE MID CAP VALUE-Z | | 2022-02-28 | 2022-11-21 |
| 1 37.812 PIMCO INCOME FUND CLASS INS | | 2019-08-29 | 2022-11-21 |
| 9.906 PRINCIPAL MIDCAP FUND-R6 | | 2022-02-28 | 2022-11-21 |
| .612 PRINCIPAL MIDCAP FUND-R6 | | 2020-08-26 | 2022-11-21 |
| 1.846 T ROWE PRICE VALUE FUND-I | | 2022-02-28 | 2022-11-21 |
| 8.923 T ROWE PRICE VALUE FUND-I | | 2018-09-12 | 2022-11-21 |
| 14.232 TOUCHSTONE SANDS EM GR-R6 | | 2022-02-28 | 2022-11-21 |
| 12.51 TRIBUTARY SMALL COMPANY FD INST PLUS FD 1705 | | 2022-02-28 | 2022-11-21 |
| 105.385 WASATCH INTL OPPORTUNIT-INST | | 2022-02-28 | 2022-11-21 |
| 114.108 WESTERN ASSET CORE PLUS BOND FUND CLASS IS | | 2019-08-29 | 2022-11-21 |

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

| (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) |
|-----------------------|--|---|--|
| 301 | | 315 | -14 |
| 393 | | 439 | -46 |
| 329 | | 357 | -28 |
| 20 | | 20 | |
| 78 | | 83 | -5 |
| 379 | | 337 | 42 |
| 178 | | 237 | -59 |
| 393 | | 402 | -9 |
| 302 | | 378 | -76 |
| 1,066 | | 1,382 | -316 |

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

| Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 | | | (l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h)) |
|---|-----------------------------------|--|--|
| (i) F.M.V. as of 12/31/69 | (j) Adjusted basis as of 12/31/69 | (k) Excess of col. (i) over col. (j), if any | |
| | | | -14 |
| | | | -46 |
| | | | -28 |
| | | | |
| | | | -5 |
| | | | 42 |
| | | | -59 |
| | | | -9 |
| | | | -76 |
| | | | -316 |

Form 990PF Part XIV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

| Recipient | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|--|---|--------------------------------|----------------------------------|-----------------------|
| Name and address (home or business) | | | | |
| a <i>Paid during the year</i> | | | | |
| KENNEDY DIONE PAGE C/O PNC BANK 116 ALLEGHENY CENTER MALL PITTSBURGH, PA 15212 | NONE | I | SCHOLARSHIP | 1,000 |
| CAMERON ALEXANDER MILES C/O PNC BANK 116 ALLEGHENY CENTER MALL PITTSBURGH, PA 15212 | NONE | I | SCHOLARSHIP | 1,000 |
| BRAY'DEN LITTLE C/O PNC BANK 116 ALLEGHENY CENTER MALL PITTSBURGH, PA 15212 | NONE | I | SCHOLARSHIP | 6,071 |
| Total | | | | ▶ 3a 13,660 |

Form 990PF Part XIV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

| Recipient | If recipient is an individual, show any relationship to any foundation manager or substantial contributor | Foundation status of recipient | Purpose of grant or contribution | Amount |
|--|---|--------------------------------|----------------------------------|--------|
| Name and address (home or business) | | | | |
| a <i>Paid during the year</i> | | | | |
| BRIANN LITTLE C/O PNC BANK 116 ALLEGHENY CENTER MALL PITTSBURGH, PA 15212 | NONE | I | SCHOLARSHIP | 4,553 |
| KALIA KNIGHT C/O PNC BANK 116 ALLEGHENY CENTER MALL PITTSBURGH, PA 15212 | NONE | I | SCHOLARSHIP | 536 |
| SARAH ROSS C/O PNC BANK 116 ALLEGHENY CENTER MALL PITTSBURGH, PA 15212 | NONE | I | SCHOLARSHIP | 500 |
| Total ▶ 3a | | | | 13,660 |

TY 2022 Applied to Prior Year Election

Name: YOUNG THOMAS TA - IRREV

EIN: 31-6664108

Election: Pursuant to IRC 4942 (h)(2) and reg. 53.4942(a)-3(d)(2), this foundation hereby elects to treat current year qualifying distributions in excess of the immediately preceding tax year's undistributed income as being made out of undistributed income from the tax year ending 12-31-2020 in the amount of \$5,505.

TY 2022 Explanation of Non-Filing with Attorney General Statement

Name: YOUNG THOMAS TA - IRREV

EIN: 31-6664108

Statement:

The Ohio Attorney General requires that charitable organizations operating or organized within the State submit an annual registration through an online portal that highlights key information from the Form 990-PF for public disclosure purposes. The Trust completes this registration as required in lieu of furnishing a copy of its Form 990-PF to comply with the specific reporting instructions of the State of Ohio.

TY 2022 Investments - Other Schedule**Name:** YOUNG THOMAS TA - IRREV**EIN:** 31-6664108**Investments Other Schedule 2**

| Category/ Item | Listed at Cost or FMV | Book Value | End of Year Fair Market Value |
|--------------------------------|------------------------------|-------------------|--------------------------------------|
| 57071813 BAIRD MIDCAP INST | | | |
| 57071854 BAIRD AGGREGATE BOND | | | |
| 316092857 FIDELITY REAL ESTATE | AT COST | 1,871 | 2,034 |
| 317609295 SEAFARER OVERSEAS GR | AT COST | 1,987 | 2,056 |
| 413838657 OAKMARK INTL SM CAP- | | | |
| 461418444 WCM FOCUSED INTL GRO | AT COST | 2,702 | 3,274 |
| 464287200 ISHARES CORE S&P 500 | AT COST | 11,015 | 13,447 |
| 464287440 ISHARES BARCLAYS 7-1 | AT COST | 10,623 | 8,908 |
| 464287804 ISHARES CORE S&P SMA | AT COST | 1,128 | 1,704 |
| 476313408 JENSEN QUALITY GROWT | AT COST | 4,191 | 4,653 |
| 552983694 MFS VALUE FUND CLASS | | | |
| 741479109 T ROWE PRICE GROWTH | | | |
| 779578103 T ROWE PRICE VALUE F | | | |
| 936793686 WASATCH INTL OPPORTU | AT COST | 2,093 | 1,796 |
| 957663503 WESTERN ASSET CORE P | | | |
| 46090E103 INVESCO QQQ TRUST ET | AT COST | 2,277 | 2,130 |
| 00769G543 CAMBIAR INTL EQUITY | | | |
| 46432F842 ISHARES CORE MSCI EA | | | |
| 52106N459 LAZARD GLOBAL LISTED | | | |
| 72201F490 PIMCO INCOME FUND CL | AT COST | 6,678 | 5,979 |
| 74256W584 PRINCIPAL MIDCAP FUN | AT COST | 2,346 | 2,257 |
| 89154Q562 TOUCHSTONE SANDS EM | | | |
| 94987W794 WELLS FARGO CORE BON | | | |
| 97717X669 WISDOMTREE U.S. QUAL | | | |
| 057071813 BAIRD MIDCAP INST | AT COST | 2,021 | 1,997 |
| 057071854 BAIRD AGGREGATE BOND | AT COST | 9,910 | 9,059 |
| 09260B309 BLACKROCK CORE BOND | AT COST | 21,484 | 18,111 |
| 413838566 OAKMARK INTL SM CAP- | AT COST | 1,403 | 1,842 |
| 543069405 LONGLEAF PARTNERS FD | AT COST | 2,062 | 1,548 |
| 55273H353 MFS VALUE FUND-R6 | AT COST | 1,716 | 3,090 |

Investments Other Schedule 2

| Category/ Item | Listed at Cost or FMV | Book Value | End of Year Fair Market Value |
|--------------------------------|------------------------------|-------------------|--------------------------------------|
| 741479406 T ROWE PR GROWTH STO | | | |
| 779578301 T ROWE PRICE VALUE F | AT COST | 3,198 | 3,546 |
| 957663669 WESTERN ASSET CORE P | AT COST | 14,786 | 12,041 |
| 00770X675 PZENA EMERG MKTS VAL | AT COST | 1,760 | 1,831 |
| 464288877 ISHARES MSCI EAFE VA | AT COST | 1,671 | 1,835 |
| 52106N616 LAZARD US CONCENTRAT | AT COST | 2,373 | 1,963 |
| 56167N712 NUANCE MID CAP VALUE | AT COST | 2,175 | 1,932 |
| 89154M702 TOUCHSTONE SANDS EM | AT COST | 1,901 | 1,799 |
| 89609H704 TRIBUTARY SMALL COMP | AT COST | 3,053 | 2,492 |

TY 2022 Other Decreases Schedule**Name:** YOUNG THOMAS TA - IRREV**EIN:** 31-6664108

| Description | Amount |
|----------------------------------|---------------|
| PRIOR YEAR ROC ADJUSTMENT | 78 |
| 2022 TRANSACTIONS POSTED IN 2023 | 209 |
| ROUNDING | 2 |

TY 2022 Other Expenses Schedule**Name:** YOUNG THOMAS TA - IRREV**EIN:** 31-6664108**Other Expenses Schedule**

| Description | Revenue and Expenses per Books | Net Investment Income | Adjusted Net Income | Disbursements for Charitable Purposes |
|-------------------|--------------------------------|-----------------------|---------------------|---------------------------------------|
| STATE FILING FEES | 100 | 0 | | 100 |

TY 2022 Other Increases Schedule**Name:** YOUNG THOMAS TA - IRREV**EIN:** 31-6664108**Other Increases Schedule**

| Description | Amount |
|----------------------------------|---------------|
| 2021 TRANSACTIONS POSTED IN 2022 | 153 |
| PRIOR YEAR ADJUSTMENT | 125 |

TY 2022 Taxes Schedule**Name:** YOUNG THOMAS TA - IRREV**EIN:** 31-6664108**Taxes Schedule**

| Category | Amount | Net Investment Income | Adjusted Net Income | Disbursements for Charitable Purposes |
|--------------------------------|---------------|----------------------------------|--------------------------------|--|
| FEDERAL TAX PAYMENT - PRIOR YE | 63 | 0 | | 0 |
| FEDERAL ESTIMATES - PRINCIPAL | 59 | 0 | | 0 |
| FOREIGN TAXES ON QUALIFIED FOR | 23 | 23 | | 0 |
| FOREIGN TAXES ON NONQUALIFIED | 5 | 5 | | 0 |