

**Return of Private Foundation**

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

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**2021**

Open to Public Inspection

Form **990-PF**

Department of the Treasury  
Internal Revenue Service

For calendar year 2021 or tax year beginning , and ending

Name of foundation <b>SCANSOURCE CHARITABLE FOUNDATION</b>		<b>A Employer identification number</b> 57-1002959
Number and street (or P.O. box number if mail is not delivered to street address) <b>6 LOGUE CT.</b>	Room/suite	<b>B Telephone number</b> 864-286-4603
City or town, state or province, country, and ZIP or foreign postal code <b>GREENVILLE, SC 29615</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>5,519,707.</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 .....	166,287.			
	<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 .....				
	<b>4</b> Dividends and interest from securities .....	134,272.	134,272.		<b>STATEMENT 1</b>
	<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 .....	258,720.			
	<b>b</b> Gross sales price for all assets on line 6a .....	850,222.			
	<b>7</b> Capital gain net income (from Part IV, line 2) .....		258,720.		
	<b>8</b> Net short-term capital gain .....			N/A	
	<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 .....					
<b>12 Total.</b> Add lines 1 through 11 .....	559,279.	392,992.	0.		
<b>Operating and Administrative Expenses</b>	<b>13</b> Compensation of officers, directors, trustees, etc. ....	0.	0.	0.	0.
	<b>14</b> Other employee salaries and wages .....				
	<b>15</b> Pension plans, employee benefits .....				
	<b>16a</b> Legal fees .....				
	<b>b</b> Accounting fees .....				
	<b>c</b> Other professional fees ..... <b>STMT 2</b>	68,050.	68,050.	0.	0.
	<b>17</b> Interest .....				
	<b>18</b> Taxes .....				
	<b>19</b> Depreciation and depletion .....				
	<b>20</b> Occupancy .....				
	<b>21</b> Travel, conferences, and meetings .....				
	<b>22</b> Printing and publications .....				
	<b>23</b> Other expenses ..... <b>STMT 3</b>	60,273.	22,142.	0.	38,131.
	<b>24 Total operating and administrative expenses.</b> Add lines 13 through 23 .....	128,323.	90,192.	0.	38,131.
	<b>25</b> Contributions, gifts, grants paid .....	446,716.			446,716.
<b>26 Total expenses and disbursements.</b> Add lines 24 and 25 .....	575,039.	90,192.	0.	484,847.	
<b>27</b> Subtract line 26 from line 12:					
<b>a</b> Excess of revenue over expenses and disbursements ...	-15,760.				
<b>b Net investment income</b> (if negative, enter -0-) .....		302,800.			
<b>c Adjusted net income</b> (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.		
		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	103,728.	263,028.	263,028.
	2 Savings and temporary cash investments			
	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			
	b Investments - corporate stock			
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment: basis			
Less: accumulated depreciation				
12 Investments - mortgage loans				
13 Investments - other	STMT 4	5,010,352.	5,256,679.	5,256,679.
14 Land, buildings, and equipment: basis				
Less: accumulated depreciation				
15 Other assets (describe)				
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		5,114,080.	5,519,707.	5,519,707.
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			
	22 Other liabilities (describe)			
23 Total liabilities (add lines 17 through 22)		0.	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	0.	0.	
	27 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	28 Retained earnings, accumulated income, endowment, or other funds	5,114,080.	5,519,707.	
	29 Total net assets or fund balances	5,114,080.	5,519,707.	
30 Total liabilities and net assets/fund balances	5,114,080.	5,519,707.		

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	5,114,080.
2 Enter amount from Part I, line 27a	2	-15,760.
3 Other increases not included in line 2 (itemize) UNREALIZED GAINS/LOSSES	3	421,387.
4 Add lines 1, 2, and 3	4	5,519,707.
5 Decreases not included in line 2 (itemize)	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29	6	5,519,707.

**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		01/01/21	12/31/21
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 795,725.		591,502.	204,223.
b 54,497.			54,497.
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) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			204,223.
b			54,497.
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	258,720.
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	204,223.

**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	4,209.
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	4,209.
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	4,209.
6 Credits/Payments:		
a 2021 estimated tax payments and 2020 overpayment credited to 2021 .....	6a	2,908.
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	0.
7 Total credits and payments. Add lines 6a through 6d .....	7	2,908.
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 SEE STATEMENT 5 ▶	9	1,301.
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid ▶	10	
11 Enter the amount of line 10 to be: Credited to 2022 estimated tax ▶ Refunded ▶	11	

**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
b 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
c 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
b 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. ▶ <u>NONE</u>		
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? 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 2021 or the tax year beginning in 2021? 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>WWW.SCANSOURCE.ORG</u>		
14 The books are in care of ▶ <u>SHELLEY WINDSOR</u> Telephone no. ▶ <u>864-329-8288</u> Located at ▶ <u>6 LOGUE COURT, GREENVILLE, SC</u> ZIP+4 ▶ <u>29615</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 ..... ▶ <u>15</u> N/A		
16 At any time during calendar year 2021, 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 ▶		

**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)? .....		
(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(5)	X
	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	N/A
<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 2021? .....	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 2021, did the foundation have any undistributed income (Part XII, lines 6d and 6e) for tax year(s) beginning before 2021? .....	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 2021 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 2021.) .....	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 2021? .....	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	N/A	
<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? If "Yes," attach the statement required by Regulations section 53.4945-5(d).	N/A	
<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?	N/A	
<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
SEE STATEMENT 8		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
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. 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 N/A	
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	
3 All other program-related investments. See instructions.	

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	5,075,166.
b	Average of monthly cash balances .....	1b	197,734.
c	Fair market value of all other assets (see instructions) .....	1c	
d	<b>Total</b> (add lines 1a, b, and c) .....	1d	5,272,900.
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	5,272,900.
4	Cash deemed held for charitable activities. Enter 1.5% (0.015) of line 3 (for greater amount, see instructions) .....	4	79,094.
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3 .....	5	5,193,806.
6	<b>Minimum investment return.</b> Enter 5% (0.05) of line 5 .....	6	259,690.

**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	259,690.
2a	Tax on investment income for 2021 from Part V, line 5 .....	2a	4,209.
b	Income tax for 2021. (This does not include the tax from Part V.) .....	2b	
c	Add lines 2a and 2b .....	2c	4,209.
3	Distributable amount before adjustments. Subtract line 2c from line 1 .....	3	255,481.
4	Recoveries of amounts treated as qualifying distributions .....	4	0.
5	Add lines 3 and 4 .....	5	255,481.
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	255,481.

**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	484,847.
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	
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	484,847.

Form 990-PF (2021)



**Part XII** Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2020	(c) 2020	(d) 2021
1 Distributable amount for 2021 from Part X, line 7				255,481.
2 Undistributed income, if any, as of the end of 2021:				
a Enter amount for 2020 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2021:				
a From 2016	318,324.			
b From 2017	841,206.			
c From 2018	1,251,509.			
d From 2019	238,939.			
e From 2020	453,619.			
f Total of lines 3a through e	3,103,597.			
4 Qualifying distributions for 2021 from Part XI, line 4: ▶ \$	484,847.			
a Applied to 2020, 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 2021 distributable amount				255,481.
e Remaining amount distributed out of corpus	229,366.			
5 Excess distributions carryover applied to 2021 (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:	3,332,963.			
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
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 2020. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2021. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2022				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2016 not applied on line 5 or line 7	318,324.			
9 Excess distributions carryover to 2022. Subtract lines 7 and 8 from line 6a	3,014,639.			
10 Analysis of line 9:				
a Excess from 2017	841,206.			
b Excess from 2018	1,251,509.			
c Excess from 2019	238,939.			
d Excess from 2020	453,619.			
e Excess from 2021	229,366.			

**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 2021, 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) 2021	(b) 2020	(c) 2019	(d) 2018	
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part IX for each year listed					
b 85% (0.85) of line 2a					
c Qualifying distributions from Part XI, line 4, for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test - 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).)

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 9**

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)*

<b>3 Grants and Contributions Paid During the Year or Approved for Future Payment</b>				
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
<b>a Paid during the year</b>				
864PRIDE 30 POINTE CIR GREENVILLE, SC 29615	NONE	PC	COMMUNITY OUTREACH	15,000.
ANGEL FLIGHT SOARS INC 2000 AIRPORT ROAD, SUITE 227, ATLANTA, GA, 30341 ATLANTA, GA 30341	NONE	PC	FAMILY ASSISTANCE	10,000.
CALVARY HOME FOR CHILDREN 110 CALVARY HOME CIR ANDERSON, SC 29621	NONE	PC	COMMUNITY OUTREACH	19,331.
CENTER FOR DEVELOPMENTAL SERVICES 29 N ACADEMY ST GREENVILLE, SC 29601	NONE	PC	COMMUNITY OUTREACH	5,000.
CHILDREN'S CANCER PARTNERS OF THE CAROLINAS 900 S. PINE STREET SUITE F SPARTANBURG, SC 29302	NONE	PC	FAMILY ASSISTANCE	5,000.
<b>Total</b> ..... <b>SEE CONTINUATION SHEET(S)</b> ..... ▶ <b>3a</b>				<b>446,716.</b>
<b>b Approved for future payment</b>				
NONE				
<b>Total</b> ..... ▶ <b>3b</b>				<b>0.</b>

**Part XV-A Analysis of Income-Producing Activities**

Enter gross amounts unless otherwise indicated.

	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1 Program service revenue:					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies .....					
2 Membership dues and assessments .....					
3 Interest on savings and temporary cash investments .....					
4 Dividends and interest from securities .....			14	134,272.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property .....					
b Not debt-financed property .....					
6 Net rental income or (loss) from personal property .....					
7 Other investment income .....					
8 Gain or (loss) from sales of assets other than inventory .....			18	258,720.	
9 Net income or (loss) from special events .....					
10 Gross profit or (loss) from sales of inventory .....					
11 Other revenue:					
a _____					
b _____					
c _____					
d _____					
e _____					
12 Subtotal. Add columns (b), (d), and (e) .....		0.		392,992.	0.
13 Total. Add line 12, columns (b), (d), and (e) .....					392,992.

(See worksheet in line 13 instructions to verify calculations.)

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

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).

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

Table with 3 columns: Question, Yes, No. Contains questions 1a through 1c regarding transfers and transactions with noncharitable exempt organizations.

Table with 4 columns: (a) Line no., (b) Amount involved, (c) Name of noncharitable exempt organization, (d) Description of transfers, transactions, and sharing arrangements. Row 1 contains '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

Table with 3 columns: (a) Name of organization, (b) Type of organization, (c) Description of relationship. Row 1 contains 'N/A'.

Sign Here 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. BOARD MEMBER

Paid Preparer Use Only Print/Type preparer's name, Preparer's signature, Date, Check self-employed, PTIN, Firm's name, Firm's EIN, Firm's address, Phone no.

**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
CHILDREN'S MUSEUM OF THE UPSTATE 300 COLLEGE STREET GREENVILLE, SC 29601	NONE	PC	COMMUNITY OUTREACH	5,000.
CHRISTMAS SHOES 411 SWEETWATER ROAD GREER, SC 29650	NONE	PC	COMMUNITY OUTREACH	5,000.
CLARITY 29 N. ACADEMY STREET GREENVILLE, SC 29601	NONE	PC	EDUCATIONAL ASSISTANCE	14,135.
CREATIVE ADVANCEMENT CENTERS 131 SUNNY RAY DRIVE, DUNCAN DUNCAN, SC 29334	NONE	PC	EDUCATIONAL ASSISTANCE	5,000.
DUNBAR CHILD DEVELOPMENT CENTER 200 MORGAN ST GREER, SC 29651	NONE	PC	EDUCATIONAL ASSISTANCE	17,157.
FIRST IMPRESSION OF SC 15 GRAND AVE GREENVILLE, SC 29607	NONE	PC	COMMUNITY OUTREACH	5,000.
FRIENDS OF MOMENTUM BIKE CLUB 225 SOUTH PLEASANTBURG DRIVE SUITE E3 GREENVILLE, SC 29607	NONE	PC	COMMUNITY OUTREACH	5,000.
GIRLS ON THE RUN UPSTATE PO BOX 170773 SPARTANBURG, SC 29301	NONE	PC	COMMUNITY OUTREACH	3,000.
GIRLUP GVL 2121 ANDERSON RD GREENVILLE, SC 29611	NONE	PC	COMMUNITY OUTREACH	5,000.
GREENVILLE CENTER FOR CREATIVE ARTS 101 ABNEY ST, GREENVILLE, SC 29611	NONE	PC	COMMUNITY OUTREACH	5,000.
<b>Total from continuation sheets</b>				<b>392,385.</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
GREENVILLE COUNTY HUMAN RELATIONS COMMISSION 301 UNIVERSITY RIDGE #1600 GREENVILLE, SC 29601	NONE	GOV	COMMUNITY OUTREACH	10,000.
GREENVILLE TECH FOUNDATION 556 PERRY AVE SUITE B 110 GREENVILLE, SC 29611	NONE	PC	EDUCATIONAL ASSISTANCE	10,000.
GREER RELIEF AND RESOURCES AGENCY 202 VICTORIA ST GREER, SC 29651	NONE	PC	FAMILY ASSISTANCE	1,000.
HABITAT FOR HUMANITY OF GREENVILLE COUNTY P.O. BOX 1206 GREENVILLE, SC 29615	NONE	POF	FAMILY ASSISTANCE	10,000.
HISPANIC ALLIANCE 225 S PLEASANTBURG DR GREENVILLE, SC 29607	NONE	PC	COMMUNITY OUTREACH	5,000.
HOPE CENTER FOR CHILDREN 202 HUDSON L. BARKSDALE BOULEVARD SPARTANBURG, SC 29306	NONE	PC	COMMUNITY OUTREACH	7,500.
JASMINE ROAD, INC. P.O. BOX 25452 GREENVILLE, SC 29609	NONE	PC	COMMUNITY OUTREACH	10,000.
LOAVES & FISHES 648 GRIFFITH RD B CHARLOTTE, NC 28217	NONE	PC	FAMILY ASSISTANCE	5,000.
MAKE-A-WISH SOUTH CAROLINA 225 S PLEASANTBURG DR C17 GREENVILLE, SC 29607	NONE	PC	FAMILY ASSISTANCE	7,500.
MENTAL FITNESS, INC. 250 S. CHURCH STREET, UNIT 402 SPARTANBURG, SC 29306	NONE	PC	COMMUNITY OUTREACH	2,500.
<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
MEYER CENTER 1132 RUTHERFORD RD GREENVILLE, SC 29609	NONE	PC	EDUCATIONAL ASSISTANCE	25,000.
MILL COMMUNITY MINISITRIES 1186 PENDLETON ST GREENVILLE, SC 29611	NONE	PC	COMMUNITY OUTREACH	100,000.
NEW MIND HEALTH AND CARE, INC. 709 DUNBAR ST GREENVILLE, SC 29601	NONE	PC	COMMUNITY OUTREACH	5,000.
PENDLETON PLACE 1133 PENDLETON ST GREENVILLE, SC 29601	NONE	PC	FAMILY ASSISTANCE	8,920.
PREDESTINED TEEN OUTREACH 111 HILLCREST DR STE C EASLEY, SC 29640	NONE	PC	COMMUNITY OUTREACH	12,500.
PRISMA HEALTH 701 GROVE RD, GREENVILLE, SC 29605	NONE	PC	FAMILY ASSISTANCE	21,973.
PUBLIC EDUCATION PARTNERS 225 S PLEASANTBURG DR, SUITE E6 GREENVILLE, SC 29607	NONE	PC	EDUCATIONAL ASSISTANCE	10,000.
SAFE HARBOR, INC. 429 N MAIN ST GREENVILLE, SC 29601	NONE	PC	FAMILY ASSISTANCE	5,000.
SC CHILDREN'S THEATRE 153 AUGUSTA ST GREENVILLE, SC 29601	NONE	PC	COMMUNITY OUTREACH	3,000.
SOUTH CAROLINA HUNTERS FOR THE HUNGRY 980 SUNNY ACRES RD PACOLET, SC 29734	NONE	PC	FAMILY ASSISTANCE	5,000.
<b>Total from continuation sheets</b>				



**Part XIV Supplementary Information**

<b>3 Grants and Contributions Paid During the Year (Continuation)</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)				
SPECIALIZED ALT. FOR FAMILIES & YOUTH-SC 4925 LACROSS ROAD, SUITE 111 NOTH CHARLESTON, SC 29406	NONE	PC	COMMUNITY OUTREACH	1,000.
STRIDES 109 NEW PERRY RD GREENVILLE, SC 29617	NONE	PC	EDUCATIONAL ASSISTANCE	2,000.
THE FAMILY EFFECT 1400 CLEVELAND ST GREENVILLE, SC 29607	NONE	PC	FAMILY ASSISTANCE	14,000.
UNITED MINISTRIES 606 PENDLETON ST GREENVILLE, SC 29601	NONE	PC	FELLOSHIPS	6,200.
UNITED WAY OF GREENVILLE COUNTY 105 EDINBURGH CT #2529 GREENVILLE, SC 29607	NONE	PC	COMMUNITY OUTREACH	10,000.
UPSTATE CIRCLE OF FRIENDS 29 RIDGEWAY DR GREENVILLE, SC 29605	NONE	PC	FAMILY ASSISTANCE	10,000.
YMCA JUDSON COMMUNITY CENTER 2 EIGHTH ST GREENVILLE, SC 29611	NONE	PC	COMMUNITY OUTREACH	5,000.
YOUTHBASE 103 S TEXAS AVE GREENVILLE, SC 29611	NONE	PC	COMMUNITY OUTREACH	10,000.
<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

**2021**

Name of the organization

SCANSOURCE CHARITABLE FOUNDATION

Employer identification number

57-1002959

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).

LHA For Paperwork Reduction Act Notice, see the instructions for Form 990, 990-EZ, or 990-PF.

Schedule B (Form 990) (2021)

Name of organization  <b>SCANSOURCE CHARITABLE FOUNDATION</b>	Employer identification number  <b>57-1002959</b>
---	---

**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	SCANSOURCE PR MATCH  6 LOGUE COURT  GREENVILLE, SC 29615	\$ 43,006.	Person <input type="checkbox"/> Payroll <input checked="" type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions.)
2	SCANSOURCE EMPLOYEES - PR WH  6 LOGUE COURT  GREENVILLE, SC 29615	\$ 43,006.	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>SCANSOURCE CHARITABLE FOUNDATION</b>	Employer identification number  <b>57-1002959</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
		\$ _____	
		\$ _____	
		\$ _____	
		\$ _____	
		\$ _____	
		\$ _____	
		\$ _____	

Name of organization  <b>SCANSOURCE CHARITABLE FOUNDATION</b>	Employer identification number  <b>57-1002959</b>
---	---

**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

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift	
Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

## FORM 990-PF

## DIVIDENDS AND INTEREST FROM SECURITIES

## STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
MERRILL LYNCH	188,769.	54,497.	134,272.	134,272.	0.
TO PART I, LINE 4	188,769.	54,497.	134,272.	134,272.	0.

## FORM 990-PF

## OTHER PROFESSIONAL FEES

## STATEMENT 2

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT FEES	68,050.	68,050.	0.	0.
TO FORM 990-PF, PG 1, LN 16C	68,050.	68,050.	0.	0.

## FORM 990-PF

## OTHER EXPENSES

## STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
STATE REGISTRATION FEES	50.	0.	0.	50.
BANK SERVICE CHARGES	279.	279.	0.	0.
OFFICE SUPPLIES	21,863.	21,863.	0.	0.
COAT PROJECT	18,459.	0.	0.	18,459.
OTHER PROGRAM EXPENSES	12,747.	0.	0.	12,747.
STAFF DEVELOPMENT	5,612.	0.	0.	5,612.
MISCELLANEOUS	1,263.	0.	0.	1,263.
TO FORM 990-PF, PG 1, LN 23	60,273.	22,142.	0.	38,131.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT 4	
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
MERRILL LYNCH #726-04204 - CASH HOLDING FUNDS	FMV	6,588.	6,588.
MERRILL LYNCH #726-04204 - GOVERNMENT SECURITIES	FMV	210,944.	210,944.
MERRILL LYNCH #726-04204 - CORPORATE BONDS	FMV	147,043.	147,043.
MERRILL LYNCH #726-04204 - MUTUAL FUNDS/CEF/UIT	FMV	119,140.	119,140.
MERRILL LYNCH #726-04204 - ESTIMATED ACCRUED INTEREST	FMV	1,578.	1,578.
MERRILL LYNCH #726-04205 - CASH HOLDING FUNDS	FMV	50,644.	50,644.
MERRILL LYNCH #726-04205 - EQUITIES	FMV	2,498,588.	2,498,588.
MERRILL LYNCH #726-04206 - CASH HOLDING FUNDS	FMV	86,988.	86,988.
MERRILL LYNCH #726-04206 - MUTUAL FUNDS/CEF/UIT	FMV	2,135,166.	2,135,166.
TOTAL TO FORM 990-PF, PART II, LINE 13		5,256,679.	5,256,679.

FORM 990-PF	INTEREST AND PENALTIES	STATEMENT 5
TAX DUE FROM FORM 990-PF, PART V		1,301.
LATE PAYMENT INTEREST		5.
LATE PAYMENT PENALTY		13.
TOTAL AMOUNT DUE		1,319.

FORM 990-PF	LATE PAYMENT INTEREST				STATEMENT 6	
DESCRIPTION	DATE	AMOUNT	BALANCE	RATE	DAYS	INTEREST
TAX DUE	05/15/22	1,301.	1,301.	.0400	36	5.
DATE FILED	06/20/22		1,306.			
TOTAL LATE PAYMENT INTEREST						5.

FORM 990-PF

LATE PAYMENT PENALTY

STATEMENT 7

DESCRIPTION	DATE	AMOUNT	BALANCE	MONTHS	PENALTY
TAX DUE	05/15/22	1,301.	1,301.	2	13.
DATE FILED	06/20/22		1,301.		
TOTAL LATE PAYMENT PENALTY					13.



FORM 990-PF

PART VII - LIST OF OFFICERS, DIRECTORS  
TRUSTEES AND FOUNDATION MANAGERS

STATEMENT 8

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
CAMILO FRANCO 6 LOGUE CT GREENVILLE, SC 29615	PRESIDENT 8.00	0.	0.	0.
JOSLYN ROZEMA 6 LOGUE CT GREENVILLE, SC 29615	VICE PRESIDENT 6.00	0.	0.	0.
JILL KREMER 6 LOGUE CT GREENVILLE, SC 29615	SECRETARY 4.00	0.	0.	0.
JENICA BRYANT 6 LOGUE CT GREENVILLE, SC 29615	TREASURER 4.00	0.	0.	0.
HASSIE DEMUTH 6 LOGUE CT GREENVILLE, SC 29615	BOARD MEMBER 1.00	0.	0.	0.
ABIGAIL DORMAN 6 LOGUE CT GREENVILLE, SC 29615	BOARD MEMBER 1.00	0.	0.	0.
JOEL DOUGLASS 6 LOGUE CT GREENVILLE, SC 29615	BOARD MEMBER 1.00	0.	0.	0.
TARISSA KNEZEVICH 6 LOGUE CT GREENVILLE, SC 29615	BOARD MEMBER 1.00	0.	0.	0.
FRANCISCO MENDEZ 6 LOGUE CT GREENVILLE, SC 29615	BOARD MEMBER 1.00	0.	0.	0.
SAVANNAH SEEGARS 6 LOGUE CT GREENVILLE, SC 29615	BOARD MEMBER 1.00	0.	0.	0.

SCANSOURCE CHARITABLE FOUNDATION

57-1002959

SHELLEY WINDSOR  
6 LOGUE CT  
GREENVILLE, SC 29615

BOARD MEMBER  
1.00

0.

0.

0.

MEGAN WEAVER  
6 LOGUE CT  
GREENVILLE, SC 29615

BOARD MEMBER  
1.00

0.

0.

0.

VIRGINIA CEBE  
6 LOGUE CT  
GREENVILLE, SC 29615

EXECUTIVE DIRECTOR  
20.00

0.

0.

0.

TOTALS INCLUDED ON 990-PF, PAGE 6, PART VII

0.

0.

0.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION  
PART XIV, LINES 2A THROUGH 2D

STATEMENT 9

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

JOEL DOUGLASS  
6 LOGUE COURT  
GREENVILLE, SC 29615

TELEPHONE NUMBER

864-286-4550

FORM AND CONTENT OF APPLICATIONS

SCANSOURCE CHARITABLE FOUNDATION REQUEST FOR FUNDING - INCLUDE ADDITIONAL  
INFO AS NEEDED

ANY SUBMISSION DEADLINES

NONE

RESTRICTIONS AND LIMITATIONS ON AWARDS

THE NEED MUST BE FOR AN AREA IN WHICH A SCANSOURCE OFFICE IS LOCATED