## Tax Exempt Entity Declaration and Signature for Electronic Filing

Department of the Treasury For calendar year 2021, or tax year beginning 07/01 , 2021, and ending $06 / 30,20 \quad 22$ Internal Revenue Service

For use with Forms 990, 990-EZ, 990-PF, 990-T, 1120-POL, 4720, 8868, 5227, 5330, and 8038-CP

OKLAHOMA MEDICAL RESEARCH FOUNDATION

## Part I Type of Return and Return Information

Check the box for the type of return being filed with Form 8453-TE and enter the applicable amount, if any, from the return. Form 8038-CP and Form 5330 filers may enter dollars and cents. For all other forms, enter whole dollars only. If you check the box on line 1a, 2a, 3a, 4a, 5a, $\mathbf{6 a}, \mathbf{7 a} \mathbf{8 a}, \mathbf{9 a}$, or $\mathbf{1 0 a}$ below, and the amount on that line of the return being filed with this form was blank, then leave line $\mathbf{1 b}, \mathbf{2 b}, \mathbf{3 b}, \mathbf{4 b}, \mathbf{5 b}$, $\mathbf{6 b}, \mathbf{7 b}, \mathbf{8}, \mathbf{9 b}$, or $\mathbf{1 0 b}$, whichever is applicable, blank (do not enter $-0-$ ). If you entered -0 - on the return, then enter -0 - on the applicable line below. Do not complete more than one line in Part I.

| 12 | Form 990 check here | b Total revenue, if any (Form 990, Part VIII, column (A), line 12) | 1b |  |
| :---: | :---: | :---: | :---: | :---: |
| 2a | Form 990-EZ check here . $\square$ | b Total revenue, if any (Form 990-EZ, line 9) | 2b |  |
| 3a | Form 1120-POL check here $\square$ | b Total tax (Form 1120-POL, line 22) | 3b |  |
| 4a | Form 990-PF check here | b Tax based on investment income (Form 990-PF, Part V, line 5) | 4b |  |
| 5 a | Form 8868 check here . | b Balance due (Form 8868, line 3c) | 5b |  |
| 6 a | Form 990-T check here . $\square$ | b Total tax (Form 990-T, Part III, line 4). | 6b | 9,704 |
| 7 a | Form 4720 check here . . $\square \square$ | b Total tax (Form 4720, Part III, line 1) | 7b |  |
| 8 a | Form 5227 check here . . $\square \square$ | b FMV of assets at end of tax year (Form 5227, Item D) | 8b |  |
| 9 a | Form 5330 check here . . $\square$ | b Tax due (Form 5330, Part II, line 19) | 9b |  |
| 10a | Form 8038-CP check here $\square \square$ | b Amount of credit payment requested (Form 8038-CP, Part III, line 22) | 10b |  |

## Part II Declaration of Officer or Person Subject to Tax

11a
I authorize the U.S. Treasury and its designated Financial Agent to initiate an Automated Clearing House (ACH) electronic funds withdrawal (direct debit) entry to the financial institution account indicated in the tax preparation software for payment of the federal taxes owed on this return, and the financial institution to debit the entry to this account. To revoke a payment, I must contact the U.S. Treasury Financial Agent at 1-888-353-4537 no later than 2 business days prior to the payment (settlement) date. I also authorize the financial institutions involved in the processing of the electronic payment of taxes to receive confidential information necessary to answer inquiries and resolve issues related to the payment.
b If a copy of this return is being filed with a state agency(ies) regulating charities as part of the IRS Fed/State program, I certify that I executed the electronic disclosure consent contained within this return allowing disclosure by the IRS of this Form 990/990-EZ/ 990-PF (as specifically identified in Part I above) to the selected state agency(ies).
Under penalties of perjury, I declare that $\quad \square \mathrm{I}$ am an officer of the above named entity or $\square \mathrm{I}$ am the person subject to tax with respect to (name of entity) $\qquad$ , (EIN) $\qquad$ ,
and that I have examined a copy of the 2021 electronic return and accompanying schedules and statements, and, to the best of my knowledge and belief, they are true, correct, and complete. I further declare that the amount in Part I above is the amount shown on the copy of the electronic return. I consent to allow my intermediate service provider, transmitter, or electronic return originator (ERO) to send the return to the IRS and to receive from the IRS (a) an acknowledgement of receipt or reason for rejection of the transmission, (b) the reason for any delay in processing the return or refund, and (c) the date of any refund.


## Part III Declaration of Electronic Return Originator (ERO) and Paid Preparer (see instructions)

I declare that I have reviewed the above return and that the entries on Form 8453-TE are complete and correct to the best of my knowledge. If I am only a collector, I am not responsible for reviewing the return and only declare that this form accurately reflects the data on the return. The entity officer or person subject to tax will have signed this form before I submit the return. I will give a copy of all forms and information to be filed with the IRS to the officer or person subject to tax, and have followed all other requirements in Pub. 4163, Modernized e-File (MeF) Information for Authorized IRS e-file Providers for Business Returns. If I am also the Paid Preparer, under penalties of perjury I declare that I have examined the above return and accompanying schedules and statements, and, to the best of my knowledge and belief, they are true, correct, and complete. This Paid Preparer declaration is based on all information of which I have any knowledge.
$\left.\begin{array}{l|l|l|l|l|l}\hline \text { ERO's } & \begin{array}{l}\text { ERO's } \\ \text { signature }\end{array} \\ \text { Use }\end{array}\right)$

Under penalties of perjury, I declare that I have examined the above return and accompanying schedules and statements, and, to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer is based on all information of which the preparer has any knowledge.

| Paid <br> Preparer <br> Use Only | Print/Type preparer SHAWN HUTCH | $\begin{aligned} & \text { er's name } \\ & \text { INSON } \end{aligned}$ | Preparer's signature | Shewn | Autctisean | $\begin{array}{\|l\|} \hline \begin{array}{l} \text { Date } \\ 5 / 8 / 23 \\ \hline \end{array} \\ \hline \end{array}$ | Check if selfemployed $\square$ | $\begin{aligned} & \text { PTIN } \\ & \text { P01048557 } \end{aligned}$ |
| :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: | :---: |
|  | Firm's name - KPMG LLP |  |  |  |  |  | Firm's EIN - | 13-5565207 |
|  | Firm's address - 300 NORTH GREENE STREET, SUITE 400, GREENSBORO, NC 27401 |  |  |  |  |  | Phone no. | (336) 275-3394 |



Part III Tax and Payments
1a Foreign tax credit (corporations attach Form 1118; trusts attach Form 1116)
b Other credits (see instructions)
c General business credit. Attach Form 3800 (see instructions)
d Credit for prior year minimum tax (attach Form 8801 or 8827)
e Total credits. Add lines 1a through 1d
2 Subtract line 1e from Part II, line 7
3 Other amounts due. Check if from: Form 4255 $\square$ Form 8611Form $8697 \square$ Form 8866 Other (attach statement)

| 1a |  |
| :---: | :---: |
| 1b |  |
| 1c |  |
| 1d |  |
| . | - |
| $8697$ | $\square$ Form 8866 |

4 Total tax. Add lines 2 and 3 (see instructions). $\square$ Check if includes tax previously deferred under section 1294. Enter tax amount here
5 Current net 965 tax liability paid from Form 965-A, Part II, column (k)
6a Payments: A 2020 overpayment credited to 2021
b 2021 estimated tax payments. Check if section 643(g) election applies $\square$
c Tax deposited with Form 8868
d Foreign organizations: Tax paid or withheld at source (see instructions)
e Backup withholding (see instructions)
f Credit for small employer health insurance premiums (attach Form 8941)
g Other credits, adjustments, and payments: $\square$ Form 2439 $\square$ Form $4136 \quad 0 \quad \square$ Other
$\qquad$

7 Total payments. Add lines 6a through 6 g
8 Estimated tax penalty (see instructions). Check if Form 2220 is attached
9 Tax due. If line 7 is smaller than the total of lines 4,5 , and 8 , enter amount owed
10 Overpayment. If line 7 is larger than the total of lines 4,5, and 8, enter amount overpaid
11 Enter the amount of line 10 you want: Credited to 2022 estimated tax $0 \quad 0 \quad$ Refunded


## Part IV Statements Regarding Certain Activities and Other Information (see instructions)

1 At any time during the 2021 calendar year, did the organization have an interest in or a signature or other authority over a financial account (bank, securities, or other) in a foreign country? If "Yes," the organization may have to file FinCEN Form 114, Report of Foreign Bank and Financial Accounts. If "Yes," enter the name of the foreign country here

2 During the tax year, did the organization receive a distribution from, or was it the grantor of, or transferor to, a foreign trust? If "Yes," see instructions for other forms the organization may have to file.
3 Enter the amount of tax-exempt interest received or accrued during the tax year \$ 824
4 Enter available pre-2018 NOL carryovers here \$
Do not include any post-2017 NOL carryover shown on Schedule A (Form 990-T). Don't reduce the NOL carryover shown here by any deduction reported on Part I, line 6.
5 Post-2017 NOL carryovers. Enter available Business Activity Code and post-2017 NOL carryovers. Don't reduce the amounts shown below by any NOL claimed on any Schedule A, Part II, line 17 for the tax year. See instructions.
Business Activity Code

6a Did the organization change its method of accounting? (see instructions)
b If 6 a is "Yes," has the organization described the change on Form 990, 990-EZ, 990-PF, or Form 1128 ? If "No," explain in Part V.

## Part V Supplemental Information

Provide the explanation required by Part IV, line 6b. Also, provide any other additional information. See instructions.


Go to www.irs.gov/Form990T for instructions and the latest information.
Department of the Treasury Internal Revenue Service - Do not enter SSN numbers on this form as it may be made public if your organization is a 501(c)(3).


1 Compensaion of oficers, director, and truses (Part ). .
1 Compensation of officers, directors, and trustees (Part X)
2 Salaries and wages
3 Repairs and maintenance
4 Bad debts
5 Interest (attach statement). See instructions
6 Taxes and licenses .
7 Depreciation (attach Form 4562). See instructions
8 Less depreciation claimed in Part III and elsewhere on return
9 Depletion
10 Contributions to deferred compensation plans
11 Employee benefit programs
12 Excess exempt expenses (Part VIII)
13 Excess readership costs (Part IX)
14 Other deductions (attach statement)
15 Total deductions. Add lines 1 through 14
16 Unrelated business income before net operating loss deduction. Subtract line 15 from Part I, line 13, column (C)
17 Deduction for net operating loss. See instructions
18 Unrelated business taxable income. Subtract line 17 from line 16

| 1 | 0 |
| :---: | ---: |
| 2 | 0 |
| 3 | 0 |
| 4 | 0 |
| 5 | 0 |
| 0 | 0 |
| 0 | 0 |
| 0 | $8 b$ |
| 9 | 0 |
| 10 | 0 |
| 11 | 0 |
| 12 | 0 |
| 13 | 0 |
| 14 | 0 |
| 15 | 0 |
|  | 0 |
| 16 | 0 |
| 17 | 0 |
| 18 | 0 |

For Paperwork Reduction Act Notice, see instructions.
Cat. No. 740360
Schedule A (Form 990-T) 2021


3 Total rents received or accrued. Add line 2c columns A through D. Enter here and on Part I, line 6, column (A) $\quad 0$
4 Deductions directly connected with the income in lines 2(a) and 2(b) (attach statement) $\square$
5 Total deductions. Add line 4 columns A through D. Enter here and on Part I, line 6, column (B)

## Part V Unrelated Debt-Financed Income (see instructions)

1 Description of debt-financed property (street address, city, state, ZIP code). Check if a dual-use. See instructions.
A $\square$
B $\square$
C $\square$
D $\square$

2 Gross income from or allocable to debt financed property
3 Deductions directly connected with or allocable to debt-financed property
a Straight line depreciation (attach statement)
b Other deductions (attach statement)
c Total deductions (add lines 3 a and 3b, columns A through D)
4 Amount of average acquisition debt on or allocable to debt - financed property (attach statement) .
5 Average adjusted basis of or allocable to debtfinanced property (attach statement) .
6 Divide line 4 by line 5
7 Gross income reportable. Multiply line 2 by line 6

| $\mathbf{A}$ | B | C | D |
| :---: | :---: | :---: | :---: |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

8 Total gross income (add line 7, columns A through D). Enter here and on Part I, line 7, column (A) . $\quad$.

10 Total allocable deductions. Add line 9, columns A through D. Enter here and on Part I, line 7, column (B) $\quad$ —
11 Total dividends - received deductions included in line 10


Part VII Investment Income of a Section 501(c)(7), (9), or (17) Organization (see instructions)


## Part IX Advertising Income

1 Name(s) of periodical(s). Check box if reporting two or more periodicals on a consolidated basis.
A
B
C
D
$\qquad$ $\longrightarrow$

Enter amounts for each periodical listed above in the corresponding column.
2 Gross advertising income

| A | B | C | D |
| :---: | :---: | :---: | :---: |
|  |  |  |  |

a Add columns A through D. Enter here and on Part I, line 11, column (A)
3 Direct advertising costs by periodical

|  |  |  |  |  |  |
| :--- | :--- | :--- | :--- | :--- | :--- | :--- | :--- |

4 Advertising gain (loss). Subtract line 3 from line 2. For any column in line 4 showing a gain, complete lines 5 through 8. For any column in line 4 showing a loss or zero, do not complete lines 5 through 7, and enter zero on line 8
5 Readership costs
6 Circulation income
7 Excess readership costs. If line 6 is less than line 5 , subtract line 6 from line 5 . If line 5 is less than line 6, enter zero
8 Excess readership costs allowed as a deduction. For each column showing a gain on line 4, enter the lesser of line 4 or line 7

|  |  |  |  |
| :--- | :--- | :--- | :--- |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

a Add line 8, columns A through D. Enter the greater of the line 8a, columns total or zero here and on Part II, line 13

## Part X Compensation of Officers, Directors, and Trustees (see instructions)

| 1. Name | 2. Title | 3. Percentage of time devoted to business | 4. Compensation attributable to unrelated business |
| :---: | :---: | :---: | :---: |
| (1) |  | \% |  |
| (2) |  | \% |  |
| (3) |  | \% |  |
| (4) |  | \% |  |
| Total. Enter here and on Part II, line 1 | . . . | . . . 1 |  |

Part XI Supplemental Information (see instructions)

| Return Reference - Identifier | Explanation |
| :--- | :---: |
| BOOK CARE - NAME AND <br> ADDRESS | TIM HASSEN, VP AND CHIEF FINANCIAL OFFICER, 825 NE 13TH STREET, OKLAHOMA CITY, OK 73104 |


| Year Generated | Amount Generated | Amount Used in Prior <br> Years | Amount Used in <br> Current Year | Amount Converted to <br> NOL | Amount Remaining | Contribution Carryover <br> Expires |
| :--- | ---: | ---: | ---: | ---: | ---: | ---: |
| 2019 | 10,330 | 9,959 | 371 |  | 0 |  |
| 2020 | 4,400 | 0 | 4,400 |  | 0 |  |
| 2021 | 45,000 | $\mathbf{0}$ | $\mathbf{0}$ | 475 |  | 44,525 |


| Name of Partnership | Share of gross income | Share of deductions | Gain or loss |
| :---: | :---: | :---: | :---: |
| (1) CROW HOLDINGS REALTY PARTNERS VII-A, LP | 52,209 |  | 52,209 |
| (2) REALTY ASSOCIATES FUND X UTP, LP | $(1,369)$ |  | $(1,369)$ |
| (3) TAILWIND CAPITAL PARTNERS III (CAYMAN), LP | 1,616 |  | 1,616 |
| Total | 52,456 | 0 | 52,456 |


| Description | Amount |  |
| :--- | :---: | :---: |
|  |  |  |
| (1) AMORTIZATION (FORM 4562, PART VI, LINE 44) |  | 0 |
| (2) EXTRATERRITORIAL INCOME EXCLUSION (FORM 8873, LINE 52) | 0 |  |

(Rev. January 2022)
Department of the Treasury Internal Revenue Service

Application for Automatic Extension of Time To File an Exempt Organization Return

- File a separate application for each return.
- Go to www.irs.gov/Form8868 for the latest information.

Electronic filing (e-file). You can electronically file Form 8868 to request a 6-month automatic extension of time to file any of the forms listed below with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, for which an extension request must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/e-file-providers/e-file-for-charities-and-non-profits.
Automatic 6-Month Extension of Time. Only submit original (no copies needed).
All corporations required to file an income tax return other than Form 990-T (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

| Type or |
| :--- | :--- | :--- |
| print |$\quad$| Name of exempt organization or other filer, see instructions. |
| :--- |
| OKLAHOMA MEDICAL RESEARCH FOUNDATION |$\quad$| Taxpayer identification number (TIN) |
| :--- |
| File by the <br> due date for <br> filing your <br> return. See <br> instructions. |
|  |

Enter the Return Code for the return that this application is for (file a separate application for each return)

| Application <br> Is For | Return <br> Code | Application <br> Is For | Return <br> Code |
| :--- | :---: | :--- | :---: |
| Form 990 or Form 990-EZ | 01 | Form 1041-A | 08 |
| Form 4720 (individual) | 03 | Form 4720 (other than individual) | 09 |
| Form 990-PF | 04 | Form 5227 | 10 |
| Form 990-T (sec. 401(a) or 408(a) trust) | 05 | Form 6069 | 11 |
| Form 990-T (trust other than above) | 06 | Form 8870 | 12 |
| Form 990-T (corporation) | 07 |  |  |

- The books are in the care of TIM HASSEN, VP AND CHIEF FINANCIAL OFFICER, 825 NE 13TH STREET, OKLAHOMA CITY, OK 73104

Telephone No.
(405) 271-7421

Fax No.
(405) 271-7119

- If the organization does not have an office or place of business in the United States, check this box
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) $\qquad$ . If this is for the whole group, check this box . . . $\square$. If it is for part of the group, check this box . . . . $\square$ and attach a list with the names and TINs of all members the extension is for.
 the organization named above. The extension is for the organization's return for:
- $\square$ calendar year 20 $\qquad$ or
- $\square$ tax year beginning $\qquad$ , 20 _21 , , and ending $\qquad$ 06/30 , 20 . 22 .

2 If the tax year entered in line 1 is for less than 12 months, check reason: $\square$ Initial return $\quad \square$ Final return $\square$ Change in accounting period

3a If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.
b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.

|  | $3 a$ |  |  |
| :--- | ---: | ---: | ---: |
|  | $\$$ | 2,006 |  |
| 3b | $\mathbf{\$}$ | 2,006 |  |
|  |  | 0 |  |

Caution: If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-TE and Form 8879-TE for payment instructions.

