

Form	990-T	┝	OMB No. 1545-0047	
		(and proxy tax under section 6033(e))		2020
		For calendar year 2020 or other tax year beginning JUL 1, 2020, and ending JUN 30, 2021	<u> </u>	2020
	ment of the Treasury	► Go to www.irs.gov/Form990T for instructions and the latest information.	(Open to Public Inspection for
	I Revenue Service	▶ Do not enter SSN numbers on this form as it may be made public if your organization is a 501(c)(3).		501(c)(3) Organizations Only
A	Check box if address changed.			-
	empt under section	Print SOUTHWESTERN UNIVERSITY		4-1233796
Χ] 501(c)(3)	Number, street, and room of suite no. If a P.O. box, see instructions.		exemption number istructions)
	408(e) 220(e)	1001 E. UNIVERSITY AVE.		
	408A 530(a) 529(a) 529S	City or town, state or province, country, and ZIP or foreign postal code GEORGETOWN, TX 78626	F	Check box if
		C Book value of all assets at end of year S45, 443, 629.		an amended return.
G	Check organization	type 🕨 🔀 501(c) corporation 🔄 501(c) trust 🔄 401(a) trust 🔄 Other trust 🔄 Ap	plicab	le reinsurance entity
	Check if filing only to			
1 (Check if a 501(c)(3)	organization filing a consolidated return with a 501(c)(2) titleholding corporation		
		attached Schedules A (Form 990-T)	2	2
		was the corporation a subsidiary in an affiliated group or a parent-subsidiary controlled group?		Yes X No
		ame and identifying number of the parent corporation.		
			512) 863-1956
Pa		related Business Taxable Income		
1		business taxable income computed from all unrelated trades or businesses (see		<u> </u>
	instructions)		1	60,832.
2			2	<u> </u>
3	Add lines 1 and 2		3	60,832.
4		utions (see instructions for limitation rules)	4	0.
5		isiness taxable income before net operating losses. Subtract line 4 from line 3	5	60,832.
6		operating loss. See instructions STATEMENT 1	6	60,832.
7	Total of unrelated	business taxable income before specific deduction and section 199A deduction.		
	Subtract line 6 from		7	1 000
8		n (generally \$1,000, but see instructions for exceptions)	8	1,000.
9		99A deduction. See instructions	9	1 000
10		. Add lines 8 and 9	10	1,000.
11	Unrelated busine	ss taxable income. Subtract line 10 from line 7. If line 10 is greater than line 7,		0
Der	enter zero		11	0.
Fal	rt II Tax Com	•		0
1	•	kable as corporations. Multiply Part I, line 11 by 21% (0.21)	1	0.
2		trust rates. See instructions for tax computation. Income tax on the amount on		
-	Part I, line 11 from		2	
3	Proxy tax. See ins		3	
4	Other tax amounts		4	
5		um tax (trusts only)	5	
6	•	liant facility income. See instructions	6	0.
7		through 6 to line 1 or 2, whichever applies	7	Form 990-T (2020)
LHA	For Paperwork F	Reduction Act Notice, see instructions.		Form 330-1 (2020)

023701 02-02-21

Form 9	90-T (2020)			Pa	age 2
Part	III Tax and Payments				
1a	Foreign tax credit (corporations attach Form 1118; trusts attach Form 1116)				
b	Other credits (see instructions) 1b				
с	General business credit. Attach Form 3800 (see instructions)				
d	Credit for prior year minimum tax (attach Form 8801 or 8827)				
е	Total credits. Add lines 1a through 1d	1e			
2	Subtract line 1e from Part II, line 7	2			0.
3	Other taxes. Check if from: Form 4255 Form 8611 Form 8697 Form 8866				
	Other (attach statement)	3			
4	Total tax. Add lines 2 and 3 (see instructions).				
	section 1294. Enter tax amount here	4			0.
5	2020 net 965 tax liability paid from Form 965-A or Form 965-B, Part II, column (k), line 4	5			0.
6a	Payments: A 2019 overpayment credited to 2020 6a				
b	2020 estimated tax payments. Check if section 643(g) election applies				
с	Tax deposited with Form 8868 6c				
d	Foreign organizations: Tax paid or withheld at source (see instructions) 6d				
е	Backup withholding (see instructions) 6e				
f	Credit for small employer health insurance premiums (attach Form 8941)				
g	Other credits, adjustments, and payments: Form 2439				
	□ Form 4136 Other Total ► 6g				
7	Total payments. Add lines 6a through 6g	7			
8	Estimated tax penalty (see instructions). Check if Form 2220 is attached	8			
9	Tax due. If line 7 is smaller than the total of lines 4, 5, and 8, enter amount owed	9			
10	Overpayment. If line 7 is larger than the total of lines 4, 5, and 8, enter amount overpaid	10			
11	Enter the amount of line 10 you want: Credited to 2021 estimated tax Refunded	11			
Part	IV Statements Regarding Certain Activities and Other Information (see instructions)				
1	At any time during the 2020 calendar year, did the organization have an interest in or a signature or other authority		Y	'es	No
	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			_	X
2	During the tax year, did the organization receive a distribution from, or was it the grantor of, or transferor to, a				
	foreign trust?			_	X
	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				
4a	Did the organization change its method of accounting? (see instructions)			_	X
b	If 4a is "Yes," has the organization described the change on Form 990, 990-EZ, 990-PF, or Form 1128? If "No,"				
	explain in Part V	<u></u>	<u></u>		
Part	V Supplemental Information				

Provide the explanation required by Part IV, line 4b. Also, provide any other additional information. See instructions.

Sign Here	Under penalties of perjury, I declare that I have examine correct, and complete. Declaration of preparer (other the	an taxpayer) is based on all information of which pre- VP FO ADMIN	parer has any knowledge. R FINANCE &	May the IRS discuss this return with the preparer shown below (see			
	Signature of officer	Date Title		instructions)? X Yes No			
Paid Preparei	Print/Type preparer's name AMANDA ADAMS	Preparer's signature Amonde Alam -04'00'	Date Check 6 07:08:24 self- emplo	if PTIN pyed P00748038			
Use Only		Firm's EI	▶ 56-0574444				
Use Oni	1075 PEAC	ITE 2200	. 404-209-0954				
	Firm's address 🕨 ATLANTA , 🤇	Firm's address 🕨 ATLANTA, GA 30309					
			· · · ·	Form 990-T (2020)			

023711 02-02-21

FORM 990-T	PRE 2018 NOL SCHEDULE	STATEMENT 1
PRE-2018 NOL CARRY FORWARD PRE-2018 NOL DEDUCTION INCI		1,278,428. 60,832.
SCHEDULE A PORTION OF PRE-2 SCHEDULE A ENTITY	2018 NOL SCHEDULE A SHARE	
1 2	0.0.	
TOTAL SCHEDULE A SHARE OF E NET OPERATING DEDUCTION BALANCE AFTER PRE-2018 NOL EXPIRING NET OPERATING LOSS CARRY FORWARD OF NET OPERAT	0. 60,832. 0. 0. 1,217,596.	

SCHEDULE A (Form 990-T)

Unrelated Business Taxable Income From an Unrelated Trade or Business

► 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).**

(3). Open to Public Inspection for 501(c)(3) Organizations Only

of

ENTITY

B Employer identification number

1

74-1233796

D Sequence:

A Name of the organization SOUTHWESTERN UNIVERSITY

C Unrelated business activity code (see instructions) ► 722514

E Describe the unrelated trade or business PUBLIC MEALS

Pa	t I Unrelated Trade or Business Income		(A) Income	(B) Expenses	(C) Net
1a	Gross receipts or sales				
b	Less returns and allowances c Balance 🕨	1c			
2	Cost of goods sold (Part III, line 8)	2			
3	Gross profit. Subtract line 2 from line 1c	3			
4 a	Capital gain net income (attach Sch D (Form 1041 or Form				
	1120)) (see instructions)	4a	0.		
b	Net gain (loss) (Form 4797) (attach Form 4797) (see instructions)	4b			
с	Capital loss deduction for trusts	4c			
5	Income (loss) from a partnership or an S corporation (attach				
	statement)	5			
6	Rent income (Part IV)	6			
7	Unrelated debt-financed income (Part V)	7			
8	Interest, annuities, royalties, and rents from a controlled				
	organization (Part VI)	8			
9	Investment income of section 501(c)(7), (9), or (17)				
	organizations (Part VII)	9			
10	Exploited exempt activity income (Part VIII)	10			
11	Advertising income (Part IX)	11			
12	Other income (see instructions; attach statement)	12			
13	Total. Combine lines 3 through 12	13	0.		
	U Deductione Net Teken Elecudere (Cas instructi				

Part II Deductions Not Taken Elsewhere (See instructions for limitations on deductions) Deductions must be directly connected with the unrelated business income

1	Compensation of officers, directors, and trustees (Part X)	1	
2	Salaries and wages		396.
3	Repairs and maintenance	3	
4	Bad debts	4	
5	Interest (attach statement) (see instructions)	5	
6	Taxes and licenses		
7	Depreciation (attach Form 4562) (see instructions) 7 69		
8	Less depreciation claimed in Part III and elsewhere on return 8a	8b	69.
9	Depletion	9	
10	Contributions to deferred compensation plans	10	
11	Employee benefit programs		
12	Excess exempt expenses (Part VIII)		
13	Excess readership costs (Part IX)		
14	Other deductions (attach statement) SEE STATEMENT 2	14	362.
15	Total deductions. Add lines 1 through 14	15	827.
16	Unrelated business income before net operating loss deduction. Subtract line 15 from Part I, line 13,		
	column (C)	16	-827.
17	Deduction for net operating loss (see instructions)	17	0.
18	Unrelated business taxable income. Subtract line 17 from line 16		-827.
I HA	For Paperwork Reduction Act Notice, see instructions,		le A (Form 990-T) 2020

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1

2

OMB No. 1545-0047

ENTITY	1
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	/=				ENTITY 1
Sched Part	ule A (Form 990-T) 2020 III Cost of Goods Sold Enter meti	hod of inventory value			Page 2
1	Inventory at beginning of year			1	
2	Purchases				
3	Cost of labor				
4	Additional section 263A costs (attach statement)			4	
5	Other costs (attach statement)				
6	Total. Add lines 1 through 5				
7	Inventory at end of year				
8	Cost of goods sold. Subtract line 7 from line 6. Enter l	nere and in Part I, line	2	8	
9	Do the rules of section 263A (with respect to property				Yes No
Part	IV Rent Income (From Real Property and	Personal Prope	erty Leased with Ro	eal Property)	
1	Description of property (property street address, city, s	tate, ZIP code). Chec	k if a dual-use (see instru	ictions)	
	A				
	В				
	c				
	D				
		Α	В	C	D
2	Rent received or accrued				
а	From personal property (if the percentage of				
	rent for personal property is more than 10%				
L.	but not more than 50%)				
b	From real and personal property (if the				
	percentage of rent for personal property exceeds 50% or if the rent is based on profit or income)				
с	Total rents received or accrued by property.				
C	Add lines Os and Ob. salumens A through D				
	Add lines 2a and 2b, columns A through D				
4	Deductions directly connected with the income in lines 2(a) and 2(b) (attach statement)				
5	Total deductions. Add line 4 columns A through D. Er	iter here and on Part	I, line 6, column (B)		0.
Part	(0				
1	Description of debt-financed property (street address, o	city, state, ZIP code).	Check if a dual-use (see	instructions)	
	A				
	в				
	D			•	
0	Ourses income from an allocable to debt financed	Α	В	С	D
2	Gross income from or allocable to debt-financed				
3	property Deductions directly connected with or allocable				
3	to debt-financed property				
а	Straight line depreciation (attach statement)				
b	Other deductions (attach statement)				
c	Total deductions (add lines 3a and 3b,				
Ŭ	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 debt-				
	financed property (attach statement)				
6	Divide line 4 by line 5		%	%	%
7	Gross income reportable. Multiply line 2 by line 6				
8	Total gross income (add line 7, columns A through D)	. Enter here and on P	art I, line 7, column (A)		0.
9	Allocable deductions. Multiply line 3c by line 6				
10	Total allocable deductions. Add line 9, columns A thr	-			0.
11	Total dividends-received deductions included in line	10			0.
023721	12-23-20			Schedule	A (Form 990-T) 2020

79 2020.05093 SOUTHWESTERN UNIVERSITY 80158881

	ule A (Form 990-T) 2020		c and D	onto fron	n Control		aonization			Page 3
Part	VI Interest, Annu		s, and h				-	,		
	1. Name of controlle	d 2 F	mployer	Exempt Controlled Organizati 3. Net unrelated 4. Total of specified 5. Part of co						6. Deductions directly
organization			tification		ne (loss)	1	nents made	that is included	in the	connected with
	0	nı	umber		tructions)			controlling orga tion's gross inc		income in column 5
(1)										
(2)										
(3)										
(4)										
		-	Nc	onexempt C	Controlled O	rganizati	ons			
7	. Taxable Income	8. Net unre		9. To	otal of specif	ied		of column 9		Deductions directly
		income (lo	,	pa	yments mad	е		luded in the organization's		connected with
		(see instruc	tions)					income	inc	come in column 10
(1)										
(2)										
<u>(3)</u>										
(4)										
								ins 5 and 10. and on Part I,		l columns 6 and 11. er here and on Part I,
								olumn (A)		ine 8, column (B)
Totals								0.		0.
Part	VII Investment	Income of a Se	ection 50	1(c)(7). (9). or (17)	Orgar	l lization (s	ee instructions)		
		cription of income			2. Amou		3. Deductio		asides	5. Total deductions
					incor	ne	directly conn		tatemer	
							(attach stater	nent)		(add cols 3 and 4)
(1)										
(2)										
(3)										
(4)										
					Add amor column 2					Add amounts in column 5. Enter
					here and o					here and on Part I,
					line 9, colu	. ,				line 9, column (B)
Totals Part					han Adu	0.				0.
		xempt Activity	Income	, Other I	nan Adve	ertisinę	g income	see instructions		
1	Description of exploite	·				- Davit I	line 10 eekun	- (0)		
2 3	Gross unrelated busin Expenses directly con					,	,	()	2	
3									3	
4	line 10, column (B) Net income (loss) from									
-	lines 5 through 7								4	
5	Gross income from ac	tivity that is not un	related bus	iness incon	 ne				5	
6	Expenses attributable								6	
7	Excess exempt expen									
	4. Enter here and on F								7	

Schedule A (Form 990-T) 2020

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Page 4

Part XI	er here and on Part II, line 1 Supplemental Information	(see instructions)				
	••					
023732 12-23-3	20				Schedule A (Form	990-T) 2020
020102 12-20-1			81			000 172020
20506	794483 80158888			SOUTHWESTERN	INTVERSTOV	80158
20300	134402 00T20000		2020.03093	200111ME21EKW	OUTVERSTIT	00100

	ule A (Form 990-T) 2020						Page
Part 1	IX Advertising Income Name(s) of periodical(s). Check box if reporting	g two or more	e periodicals on a	a consolidated basis	5.		
	A						
	В						
	c						
	D						
Enter a	amounts for each periodical listed above in the c	correspondin <u>c</u>	_				
•			A	<u> </u>	C		D
2	Gross advertising income		(()				0.
	Add columns A through D. Enter here and on	Part I, line I I	, column (A)			-	0.
а З	Direct advertiging costs by periodical						
a	Direct advertising costs by periodical		column (B)				0.
a	Add coldmins A through D. Enter here and on	raiti, inc ri	, column (b)				
4	Advertising gain (loss). Subtract line 3 from line	ne 🗌					
•	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 les	ss					
	than line 6, enter zero						
8	Excess readership costs allowed as a						
	deduction. For each column showing a gain or	n					
	line 4, enter the lesser of line 4 or line 7						
а	Add line 8, columns A through D. Enter the gre	eater of the lir	ne 8a, columns t	otal or zero here and	d on		
	Part II, line 13					•	0.
Part	X Compensation of Officers, Dire	ectors, an	d Trustees	(see instructions)			
					3. Percentage		4. Compensation
	1. Name		2. Title		of time devoted		attributable to
					to business	<u>ι</u>	unrelated business
<u>(1)</u>					%	<u> </u>	
(2)					%	<u> </u>	
(3)					%	<u> </u>	
<u>(4)</u>					%	─	
T	Estadous and an Dark II. Kas d						0.
Part	. Enter here and on Part II, line 1 XI Supplemental Information (see		· · · · · · · · · · · · · · · · · · ·		····· ►		0.
Fail		e instructions)				

FORM 990-T (A)	OTHER DEDUCTIONS	STATEMENT 2
DESCRIPTION		AMOUNT
DIRECT PUBLIC MEALS EXPENSES TAX PREPARATION FEES		152. 210.
TOTAL TO SCHEDULE A, PART II,	LINE 14	362.

SCHEDULE A (Form 990-T)

Department of the Treasury

Internal Revenue Service

Unrelated Business Taxable Income From an Unrelated Trade or Business

Go to www.irs.gov/Form990T for instructions and the latest information.

Do not enter SSN numbers on this form as it may be made public if your organization is a 501(c)(3).

2020

OMB No. 1545-0047

ENTITY

B Employer identification number

2

of

74-1233796

D Sequence:

o pointo i	
501(c)(3)	Organizations Only

2

A Name of the organization SOUTHWESTERN UNIVERSITY

C Unrelated business activity code (see instructions) ► 901101

E Describe the unrelated trade or business **INVESTMENTS**

Pa	t I Unrelated Trade or Business Income		(A) Income	(B) Expenses	(C) Net
1a b	Gross receipts or sales	1c			
2	Less returns and allowances c Balance ► Cost of goods sold (Part III, line 8)	2			
3	Gross profit. Subtract line 2 from line 1c	3			
4 a	Capital gain net income (attach Sch D (Form 1041 or Form 1120)) (see instructions)	4a	338,674.		338,674.
b	Net gain (loss) (Form 4797) (attach Form 4797) (see instructions)	4b			
с	Capital loss deduction for trusts	4c			
5	Income (loss) from a partnership or an S corporation (attach statement) STATEMENT 3	5	-273,615.		-273,615.
6	Rent income (Part IV)	6			
7	Unrelated debt-financed income (Part V)	7			
8	Interest, annuities, royalties, and rents from a controlled organization (Part VI)	8			
9	Investment income of section 501(c)(7), (9), or (17) organizations (Part VII)	9			
10	Exploited exempt activity income (Part VIII)	10			
11	Advertising income (Part IX)	11			
12	Other income (see instructions; attach statement)	12			
13	Total. Combine lines 3 through 12	13	65,059.		65,059.

Part II Deductions Not Taken Elsewhere (See instructions for limitations on deductions) Deductions must be directly connected with the unrelated business income

1	Compensation of officers, directors, and trustees (Part X)	1			
2	Salaries and wages				1,837.
3	Repairs and maintenance			3	
4	Bad debts			4	
5	Interest (attach statement) (see instructions)			5	
6	Taxes and licenses			6	
7	Depreciation (attach Form 4562) (see instructions)	7			
8	Less depreciation claimed in Part III and elsewhere on return	8a		8b	
9	Depletion			9	
10	Contributions to deferred compensation plans				
11	Employee benefit programs				
12	Excess exempt expenses (Part VIII)			12	
13	Excess readership costs (Part IX)				
14	Other deductions (attach statement)	EE	STATEMENT 4	14	2,390.
15	Total deductions. Add lines 1 through 14			15	4,227.
16	Unrelated business income before net operating loss deduction. Subtract line 15 fro	m Parl	I, line 13,		
	column (C)			16	60,832.
17	Deduction for net operating loss (see instructions)			17	0.
18	Unrelated business taxable income. Subtract line 17 from line 16				60,832.
LHA	For Paperwork Reduction Act Notice, see instructions.			Schedu	le A (Form 990-T) 2020

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					ENTITY
art	ule A (Form 990-T) 2020	od of inventory valuatio	n 🕨		Page
1	Inventory at beginning of year			1	
2	Purchases				
3	Cost of labor				
4	Additional section 263A costs (attach statement)				
5	Other costs (attach statement)				
6	Total. Add lines 1 through 5				
7	Inventory at end of year				
8	Cost of goods sold. Subtract line 7 from line 6. Enter he	ere and in Part I, line 2		8	
9	Do the rules of section 263A (with respect to property pr				Yes N
art	IV Rent Income (From Real Property and	Personal Property	y Leased with Rea	l Property)	
1	Description of property (property street address, city, sta	te, ZIP code). Check if	a dual-use (see instruct	ions)	
	A				
	В				
	c				
	D			-	
_		A	B	С	D
2	Rent received or accrued				
а	From personal property (if the percentage of				
	rent for personal property is more than 10%				
	but not more than 50%)				
b	From real and personal property (if the				
	percentage of rent for personal property exceeds				
_	50% or if the rent is based on profit or income)				
С	Total rents received or accrued by property. Add lines 2a and 2b, columns A through D				
2	Total rents received or accrued. Add line 2c columns A t	hrough D. Entar hara a	nd on Dort L line C ook		0
3	Deductions directly connected with the income	niougii D. Enter nere a			•
4	in lines 2(a) and 2(b) (attach statement)				
-					
5	Total deductions. Add line 4 columns A through D. Enter	er here and on Part I. li	ne 6. column (B)		0
art		e instructions)	,(,	F	
1	Description of debt-financed property (street address, cit				
		,	eck if a dual-use (see in	structions)	
	A	,	eck if a dual-use (see in	structions)	
	A B	,	eck if a dual-use (see in	structions)	
		,	eck if a dual-use (see in	structions)	
	в	,	eck if a dual-use (see in	structions)	
	B C	,	eck if a dual-use (see in	structions)	D
2	B C	y, state, ZIP code). Ch			D
2	B C D	y, state, ZIP code). Ch			D
	B C D Gross income from or allocable to debt-financed	y, state, ZIP code). Ch			D
2 3	B C D Gross income from or allocable to debt-financed property	y, state, ZIP code). Ch			D
	B	y, state, ZIP code). Ch			D
3	B	y, state, ZIP code). Ch			D
3 a	B	y, state, ZIP code). Ch			D
3 a b	B	y, state, ZIP code). Ch			D
3 a b	B	y, state, ZIP code). Ch			D
3 a b c	B	y, state, ZIP code). Ch			D
3 a b c	B	y, state, ZIP code). Ch			D
3 a b c 4	B	y, state, ZIP code). Ch			D
3 a b c 4	B	y, state, ZIP code). Ch			D
3 b c 4 5	B	A A	B	C	D
3 b c 4 5	B	A A	B	C	
3 b c 4 5 6 7	B	A A	B	C	D
3 b c 4 5 6 7 8	B	A A	B	C	
3 b c 4 5 6 7 8 9	B	y, state, ZIP code). Ch	B % 1, line 7, column (A)	C	0
3 b c 4 5 6 7	B	y, state, ZIP code). Ch	B % 1, line 7, column (A)	C	0

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	ule A (Form 990-T) 2020		waltion and D	onto fror	n Control		aonization				Page
Part	VI Interest, Annu	lilles, nu	Jyailles, and ne				-	i,			
	4 Nouse of contuclie	al	0 Employee	O Nist		1	Exempt Contro		0 D		
	 Name of controlle organization 	a	2. Employer		unrelated ne (loss)	1	al of specified nents made	5. Part of coluthat is included			eductions directly onnected with
	organization		identification number		structions)	payi	nems made	controlling org	janiza-		ome in column 5
			number	(366 113	structions			tion's gross ir	icome		
(1)											
<u>(2)</u>											
(3)											
(4)			N.			<u> </u>					
	Tarrah la la anna			· · ·	Controlled O	<u> </u>		- (1 44	Deal	
(. Taxable Income		Net unrelated		otal of speci			of column 9 cluded in the	11.		uctions directly nected with
			icome (loss) e instructions)	pa	yments mac	le	controlling	organization's	in		e in column 10
		(300					gross	income		come	
(1)											
<u>(2)</u>											
(3)											
(4)											
								nns 5 and 10. and on Part I,			umns 6 and 11. re and on Part I,
								column (A)			, column (B)
T						•		0			0
Totals Part	VII Invoctmont	Incomo	of a Section 50	1(0)(7) (0) or (17)			0.			0
Turt		cription of		(U)(7), (1			ee instructions)		5	Total deduction
	1. Dest		income		2. Amou		3. Deduction		t-asides stateme		and set-asides
							(attach state				add cols 3 and 4
(1)											
(2)											
(3)											
(4)											
(+)					Add amo	unts in					Add amounts in
					column 2						column 5. Enter
					here and o line 9, colu	,					here and on Part I line 9, column (B)
Totals						0.					0 .
Part	VIII Exploited E	xempt A	ctivity Income	. Other 1	han Adv		a Income	(see instructions	3)		
1	Description of exploite			,			y				
2	Gross unrelated busin	,		ness Ente	r here and o	n Part I	line 10. colum	n (A)	2		
3	Expenses directly con					,	,	()			
Ŭ	line 10, column (B)		-						3		
4	Net income (loss) from										
Ŧ	lines 5 through 7								4		
5	Gross income from ac	tivity that i	s not unrelated bus	iness incor	 ne				5		
6	Expenses attributable								6		
7	Excess exempt expen										
	4. Enter here and on F								7		
		Si C 11, 1110	· —								

Schedule A (Form 990-T) 2020

023731 12-23-20

023732 12-23-20	86		Schedule A (Form	990-T) 2020
07020506 794483 80158888		SOUTHWESTERN	UNIVERSITY	80158881

1	Name(s) of periodical(s). Check box if reportin	ng two or more p	eriodicals on a	a consolidated basis	S.	
	A 🗌					
	В					
	c 🗌					
	D					
Entor o	mounts for each periodical listed above in the	oorrooponding o				
Entera	mounts for each periodical listed above in the		-			
			Α	B	C	D
2	Gross advertising income					
	Add columns A through D. Enter here and on	Part I, line 11, c	olumn (A)		►	0.
а						
3	Direct advertising costs by periodical					
а	Add columns A through D. Enter here and on	Part I, line 11, c	olumn (B)			0.
4	Advertising gain (loss). Subtract line 3 from lir	ne				
	2. For any column in line 4 showing a gain,					
	complete lines 5 through 8. For any column ir	n				
	line 4 showing a loss or zero, do not complete					
	lines 5 through 7, and enter zero on line 8					
F						
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 le					
	than line 6, enter zero					
8	Excess readership costs allowed as a					
	deduction. For each column showing a gain of	on				
	line 4, enter the lesser of line 4 or line 7					
а	Add line 8, columns A through D. Enter the g	reater of the line	8a, columns t	otal or zero here and	d on	
	Part II, line 13					0.
Part 3	X Compensation of Officers, Dir	rectors, and '	Trustees	(see instructions)		
					3. Percentage	4. Compensation
	1. Name		2. Title		of time devoted	attributable to
					to business	unrelated business
(1)					%	
					%	
(2)					1 1	
(3)					%	
4)					%	
_						0
	Enter here and on Part II, line 1				🕨	0.
Part :	XI Supplemental Information (se	ee instructions)				

 Schedule A (Form 990-T) 2020

 Part IX
 Advertising Income

Page 4

FORM 990-T (A)

2,390.

DESCRIPTION			INCOME (LOSS)
CGDI, LLC - OTHER INCOME (LOSS) CCIP VII - OTHER INCOME (LOSS) CCPEP VIII - OTHER INCOME (LOSS) CCVP IX - OTHER INCOME (LOSS) CCVP X - OTHER INCOME (LOSS) CCNRP VIII - OTHER INCOME (LOSS) CCNRP IX - OTHER INCOME (LOSS) CSSREOP FUND - OTHER INCOME (LOSS) CSSREO FUND 2014 - OTHER INCOME (LOSS) CSSREO FUND 2014 - OTHER INCOME (LOSS) CCSSGPE FUND - OTHER INCOME (LOSS) CCSSGPE FUND - OTHER INCOME (LOSS) CCNRP X - OTHER INCOME (LOSS) CCNRP X - OTHER INCOME (LOSS) CCVP XII - OTHER INCOME (LOSS) CNRP XI - OTHER INCOME (LOSS) CNRP XI - OTHER INCOME (LOSS) CPC FUND 2018 - OTHER INCOME (LOSS) CREOF 2018 - OTHER INCOME (LOSS) CCVP XIII - OTHER INCOME (LOSS) CCVP XIII - OTHER INCOME (LOSS) CTVP XIII - OTHER INCOME (LOSS) CCVP XIII - OTHER INCOME (LOSS) CCVP XIII - OTHER INCOME (LOSS)	55)) DSS)		$\begin{array}{r} 4.\\ 810.\\ 50, 578.\\ -52.\\ -1, 411.\\ -16, 541.\\ -18, 475.\\ 4, 115.\\ 15, 785.\\ -3, 336.\\ -28, 200.\\ -71, 517.\\ -53, 345.\\ -21, 757.\\ -944.\\ 2, 543.\\ -43, 358.\\ -15, 473.\\ -73, 041.\\ \end{array}$
FORM 990-T (A) OTH	HER DEDUCTIONS	STAT	EMENT 4
DESCRIPTION		A	MOUNT
TAX PREPARATION FEES			2,390.

INCOME (LOSS) FROM PARTNERSHIPS

TOTAL TO SCHEDULE A, PART II, LINE 14

STATEMENT 3

Name

Department of the Treasury Internal Revenue Service

Capital Gains and Losses Attach to Form 1120, 1120-C, 1120-F, 1120-FSC, 1120-H, 1120-IC-DISC, 1120-L, 1120-ND, 1120-PC, 1120-POL, 1120-REIT, 1120-RIC, 1120-SF, or certain Forms 990-T. Go to www.irs.gov/Form1120 for instructions and the latest information.

OMB No. 1545-0123

2020

Yes X No

Employer identification number

74-1233796

SOUTHWESTERN UNIVERSITY

Did the corporation dispose of any investment(s) in a qualified opportunity fund during the tax year?

Port L Short Torm Copital Ca	-		-			
Part I Short-Term Capital Gai	INS AND LOSSES - ASS	ets neid One Year	or Less			
See instructions for how to figure the amounts to enter on the lines below.	(d)	(e)	(g) Adjustments to ga		(h) Gain or (loss) Subtract column (e) from	
This form may be easier to complete if you round off cents to whole dollars.	Proceeds (sales price)	Cost (or other basis)	or loss from Form(s) 89 Part I, line 2, column		column (d) and combine the result with column (g)	
 1a Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line 						
blank and go to line 1b						
1b Totals for all transactions reported on						
Form(s) 8949 with Box A checked						
2 Totals for all transactions reported on						
Form(s) 8949 with Box B checked						
3 Totals for all transactions reported on						
Form(s) 8949 with Box C checked					4,936.	
4 Short-term capital gain from installment sales				4		
5 Short-term capital gain or (loss) from like-king				5		
6 Unused capital loss carryover (attach compute				6	()	
7 Net short-term capital gain or (loss). Combin Part II Long-Term Capital Gai	<u>e lines 1a through 6 in column</u>	h		7	4,936.	
	ns and Losses - Ass	ets Held More Thai	n One Year			
See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to ga or loss from Form(s) 89 Part II, line 2, column	49,	(h) Gain or (loss) Subtract column (e) from column (d) and combine the	
		. , ,			result with column (g)	
8a Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b						
8b Totals for all transactions reported on						
Form(s) 8949 with Box D checked						
9 Totals for all transactions reported on						
Form(s) 8949 with Box E checked						
10 Totals for all transactions reported on						
Form(s) 8949 with Box F checked					<u>274,975.</u> 58,763.	
11 Enter gain from Form 4797, line 7 or 9				11	58,763.	
12 Long-term capital gain from installment sales	from Form 6252, line 26 or 37	7		12		
13 Long-term capital gain or (loss) from like-king				13		
14 Capital gain distributions				14		
15 Net long-term capital gain or (loss). Combine				15	333,738.	
Part III Summary of Parts I and						
16 Enter excess of net short-term capital gain (lir	ne 7) over net long-term capita	l loss (line 15)		16	4,936.	
17 Net capital gain. Enter excess of net long-term				17	333,738.	
18 Add lines 16 and 17. Enter here and on Form				18	338,674.	
Note: If losses exceed gains, see Capital Losses in the instructions.						

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 1120.

Schedule D (Form 1120) 2020

021051 12-14-20



Sales and Other Dispositions of Capital Assets

Go to www.irs.gov/Form8949 for instructions and the latest information. File with your Schedule D to list your transactions for lines 1b, 2, 3, 8b, 9, and 10 of Schedule D. OMB No. 1545-0074

Attachmen Sequence No. 12A

Social security number or

taxpayer identification no.

Name(s) shown on return

SOUTHWESTERN UNIVERSITY

74-1233796 Before you check Box A, B, or C below, see whether you received any Form(s) 1099-B or substitute statement(s) from your broker. A substitute statement will have the same information as Form 1099-B. Either will show whether your basis (usually your cost) was reported to the IRS by your broker and may even tell you which box to check. Short-Term. Transactions involving capital assets you held 1 year or less are generally short-term (see instructions). For long-term Part I transactions, see page 2. Note: You may aggregate all short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS and for which no adjustments or codes are required. Enter the totals directly on Schedule D, line 1a; you aren't required to report these transactions on Form 8949 (see instructions). You must check Box A, B, or C below. Check only one box. If more than one box applies for your short-term transactions, complete a separate Form 8949, page 1, for each applicable box. If you have more short-term transactions than will fit on this page for one or more of the boxes, complete as many forms with the same box checked as you need (A) Short-term transactions reported on Form(s) 1099-B showing basis was reported to the IRS (see Note above) (B) Short-term transactions reported on Form(s) 1099-B showing basis wasn't reported to the IRS X (C) Short-term transactions not reported to you on Form 1099-B Adjustment, if any, to gain or 1 (d) (h) (a) (b) (c) (e) loss. If you enter an amount Proceeds Description of property Date sold or Cost or other Gain or (loss). Date acquired in column (g), enter a code in (sales price) Subtract column (e) basis. See the (Example: 100 sh. XYZ Co.) (Mo., day, yr.) disposed of column (f). See instructions. Note below and from column (d) & (Mo., day, yr.) (f) (g) Amount of see *Column (*e) in combine the result Code(s) with column (g) the instructions adjustment CCPEP VIII 401. CCNRP VIII <33.> CCNRP IX <16.> 652. CCVP XI 76. CCSSGPE FUND 828. CCNRP X CCSSGPE FUND II 336. CCVP XII 1,490. CNRP XI 256. 445. CCVP XIII CCSSGPE FUND III 501. 2 Totals. Add the amounts in columns (d), (e), (g), and (h) (subtract negative amounts). Enter each total here and include on your Schedule D, line 1b (if Box A above is checked), line 2 (if Box B 4,936. above is checked), or line 3 (if Box C above is checked) Note: If you checked Box A above but the basis reported to the IRS was incorrect, enter in column (e) the basis as reported to the IRS, and enter an

adjustment in column (g) to correct the basis. See Column (g) in the separate instructions for how to figure the amount of the adjustment.

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Form 8949 (2020)				Attachn	nent Sequer	nce No. 12A	Page 2
Name(s) shown on return. Name and	I SSN or taxpaye	er identification n	o. not required if			Social secu	rity number or entification no.
SOUTHWESTERN U	NIVERSITY	Y				74-1	233796
Before you check Box D, E, or F belo statement will have the same informa	w, see whether y ation as Form 109	you received any 99-B. Either will s	Form(s) 1099-B c show whether you	or substitute statem Ir basis (usually you	ent(s) from y r cost) was i		
Part II Long-Term. Transaction see page 1.		al assets you held n	nore than 1 year are	generally long-term (s	see instruction	ns). For short-term t	ransactions,
Note: You may aggregate all							
codes are required. Enter the You must check Box D, E, or F below. C	Check only one bo	x. If more than one b	ox applies for your long	-term transactions, compl	ete a separate F	orm 8949, page 2, for	
If you have more long-term transactions than will					-		
(D) Long-term transactions rep	-	-		-	Note abov	/e)	
(E) Long-term transactions rep				eported to the IRS			
				(a)	Adjustment	, if any, to gain or	(12)
1 (a) Description of property	(b) Date acquired	(c) Date sold or	(d) Proceeds	(e) Cost or other	loss. If you	i enter an amount	(h) Gain or (loss).
(Example: 100 sh. XYZ Co.)	(Mo., day, yr.)	disposed of	(sales price)	basis. See the	in column (g), enter a code in See instructions .	Subtract column (e)
		(Mo., day, yr.)		Note below and	(f)	(g)	from column (d) & combine the result
				see Column (e) in the instructions	Code(s)	Amount of adjustment	with column (g)
CCIP VII						aujustment	2,575.
CCPEP VIII							128,123.
CCVP X							2,217.
CCNRP VIII							2,567.
CCNRP IX							2,609.
CSSREOP FUND							69.
CCVP XI							34,982.
CCSSGPE FUND							6,600.
CCNRP X							16,445.
CCSSGPE FUND II							45,661.
CCVP XII							7,859.
CNRP XI							<613.>
CCVP XIII							2,956.
CCSSGPE FUND III							22,925.
				+			
				+			
2 Totals Add the amounts in column	$\frac{1}{1}$	nd (b) (subtract					
2 Totals. Add the amounts in columnegative amounts). Enter each tot							
Schedule D, line 8b (if Box D abo							
above is checked), or line 10 (if E							274,975.
Note: If you checked Box D above b			was incorrect ent	er in column (e) the	basis as re	ported to the IRS	
adjustment in column (g) to correct t							

023012 12-11-20

Name

Department of the Treasury Internal Revenue Service

Capital Gains and Losses Attach to Form 1120, 1120-C, 1120-F, 1120-FSC, 1120-H, 1120-IC-DISC, 1120-L, 1120-ND, 1120-PC, 1120-POL, 1120-REIT, 1120-RIC, 1120-SF, or certain Forms 990-T. Go to www.irs.gov/Form1120 for instructions and the latest information.

OMB No. 1545-0123

2020

Yes X No

Employer identification number

74-1233796

SOUTHWESTERN UNIVERSITY

Did the corporation dispose of any investment(s) in a qualified opportunity fund during the tax year?

Port L Short Torm Copital Ca	-		-			
Part I Short-Term Capital Gai	INS AND LOSSES - ASS	ets neid One Year	or Less			
See instructions for how to figure the amounts to enter on the lines below.	(d)	(e)	(g) Adjustments to ga		(h) Gain or (loss) Subtract column (e) from	
This form may be easier to complete if you round off cents to whole dollars.	Proceeds (sales price)	Cost (or other basis)	or loss from Form(s) 89 Part I, line 2, column		column (d) and combine the result with column (g)	
 1a Totals for all short-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line 						
blank and go to line 1b						
1b Totals for all transactions reported on						
Form(s) 8949 with Box A checked						
2 Totals for all transactions reported on						
Form(s) 8949 with Box B checked						
3 Totals for all transactions reported on						
Form(s) 8949 with Box C checked					4,936.	
4 Short-term capital gain from installment sales				4		
5 Short-term capital gain or (loss) from like-king				5		
6 Unused capital loss carryover (attach compute				6	()	
7 Net short-term capital gain or (loss). Combin Part II Long-Term Capital Gai	<u>e lines 1a through 6 in column</u>	h		7	4,936.	
	ns and Losses - Ass	ets Held More Thai	n One Year			
See instructions for how to figure the amounts to enter on the lines below. This form may be easier to complete if you round off cents to whole dollars.	(d) Proceeds (sales price)	(e) Cost (or other basis)	(g) Adjustments to ga or loss from Form(s) 89 Part II, line 2, column	49,	(h) Gain or (loss) Subtract column (e) from column (d) and combine the	
		. , ,			result with column (g)	
8a Totals for all long-term transactions reported on Form 1099-B for which basis was reported to the IRS and for which you have no adjustments (see instructions). However, if you choose to report all these transactions on Form 8949, leave this line blank and go to line 8b						
8b Totals for all transactions reported on						
Form(s) 8949 with Box D checked						
9 Totals for all transactions reported on						
Form(s) 8949 with Box E checked						
10 Totals for all transactions reported on						
Form(s) 8949 with Box F checked					<u>274,975.</u> 58,763.	
11 Enter gain from Form 4797, line 7 or 9				11	58,763.	
12 Long-term capital gain from installment sales	from Form 6252, line 26 or 37	7		12		
13 Long-term capital gain or (loss) from like-king				13		
14 Capital gain distributions				14		
15 Net long-term capital gain or (loss). Combine				15	333,738.	
Part III Summary of Parts I and						
16 Enter excess of net short-term capital gain (lir	ne 7) over net long-term capita	l loss (line 15)		16	4,936.	
17 Net capital gain. Enter excess of net long-term				17	333,738.	
18 Add lines 16 and 17. Enter here and on Form				18	338,674.	
Note: If losses exceed gains, see Capital Losses in the instructions.						

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 1120.

Schedule D (Form 1120) 2020

021051 12-14-20



Name(s) shown on return

Sales and Other Dispositions of Capital Assets

Go to www.irs.gov/Form8949 for instructions and the latest information. File with your Schedule D to list your transactions for lines 1b, 2, 3, 8b, 9, and 10 of Schedule D. OMB No. 1545-0074

Attachme Sequence No. 12A

Social security number or taxpayer identification no.

74-1233796

SOUTHWESTERN U	NIVERSITY	Y				74-1	233796
Before you check Box A, B, or C bel statement will have the same inform	ow, see whether ation as Form 109	you received any 99-B. Either will s	r Form(s) 1099-B show whether you	or substitute staten Ir basis (usually you	nent(s) fron r cost) was	n your broker. A su s reported to the IF	lbstitute IS by your
broker and may even tell you which I Part I Short-Term. Transact	<i>DOX TO CHECK.</i> ions involving capit	al assets you held	1 vear or less are ge	enerally short-term (see	e instruction	s). For long-term	
transactions, see page 2.							liveterente en
Note: You may aggregate al codes are required. Enter the							
You must check Box A, B, or C below. If you have more short-term transactions than wi							each applicable box.
(A) Short-term transactions re					,		
(B) Short-term transactions re			-	-	note as	010)	
X (C) Short-term transactions no			-				
1 (a)	(b)	(c)	(d)	(e)	Adjustmer	nt, if any, to gain or	(h)
Description of property	Date acquired	Date sold or	Proceeds	Cost or other	loss. If y	ou enter an amount	Gain or (loss).
(Example: 100 sh. XYZ Co.)	(Mo., day, yr.)	disposed of	(sales price)	basis. See the		(g), enter a code in). See instructions.	Subtract column (e)
		(Mo., day, yr.)		Note below and	(f)	(g)	from column (d) & combine the result
				see Column (e) in the instructions	Code(s)	Amount of adjustment	with column (g)
CCPEP VIII						aujustment	401.
CCNRP VIII							<33.2
CCNRP IX							<16.2
CCVP XI							652.
CCSSGPE FUND							76.
CCNRP X							828.
CCSSGPE FUND II							336.
CCVP XII							1,490.
CNRP XI							256.
CCVP XIII							445.
CCSSGPE FUND III							501.
CCSSGPE FUND III							501.
	1						<u> </u>
2 Totals. Add the amounts in colu							
negative amounts). Enter each to							
Schedule D, line 1b (if Box A abo		,					4 000
above is checked), or line 3 (if B							4,936.
Note: If you checked Box A above b adjustment in column (g) to correct						•	

92

Form 8949 (2020)				Attachn	nent Seque	nce No. 12A	Page 2
Name(s) shown on return. Name and	I SSN or taxpaye	er identification n	o. not required if			Social secu	rity number or entification no.
SOUTHWESTERN U	NIVERSIT	Y				74-1	233796
Before you check Box D, E, or F belo statement will have the same informa	ow, see whether ation as Form 10	you received any 99-B. Either will s	Form(s) 1099-B c show whether you	or substitute statem Ir basis (usually you	ent(s) from r cost) was		
Part II Long-Term. Transaction see page 1.		al assets you held r	nore than 1 year are	generally long-term (s	ee instructio	ns). For short-term t	ransactions,
Note: You may aggregate all codes are required. Enter the You must check Box D, E, or F below. O If you have more long-term transactions than will	e totals directly on S Check only one bo	Schedule D, line 8a	; you aren't required ox applies for your long	to report these trans -term transactions, compl	actions on Fo	orm 8949 (see instru Form 8949, page 2, for	ictions).
(D) Long-term transactions rep	-		-		Note abo	ve)	
(E) Long-term transactions rep			-	eported to the IRS			
X (F) Long-term transactions not					Adjustmont	t, if any, to gain or	(1)
1 (a) Description of property	(b)	(c) Date sold or	(d) Proceeds	(e) Cost or other	loss. If yo	ú enter an amount	(h) Gain or (loss).
(Example: 100 sh. XYZ Co.)	Date acquired (Mo., day, yr.)	disposed of	(sales price)	basis. See the	in column ((g), enter a code in See instructions .	Subtract column (e)
	(1101, ddy, yr.)	(Mo., day, yr.)		Note below and	(f)	(g)	from column (d) &
				see Column (e) in the instructions	Code(s)	Amount of	combine the result with column (g)
CCIP VII						adjustment	2,575.
CCPEP VIII							128,123.
CCVP X							2,217.
CCNRP VIII							2,567.
CCNRP IX							2,609.
CSSREOP FUND							69.
CCVP XI							34,982.
CCSSGPE FUND							6,600.
CCNRP X							16,445.
CCSSGPE FUND II							45,661.
CCVP XII							7,859.
CNRP XI							<613.>
CCVP XIII							2,956.
CCSSGPE FUND III							22,925.
2 Totals. Add the amounts in colur negative amounts). Enter each to							
Schedule D, line 8b (if Box D abo							
above is checked), or line 10 (if E							274,975.
Note: If you checked Box D above b			was incorrect. ent	er in column (e) the	basis as re	eported to the IRS	
adjustment in column (g) to correct t							

023012 12-11-20

Form 4562	
Department of the Treasury Internal Revenue Service	(99)

Depreciation and Amortization (Including Information on Listed Property)

A PG1

OMB No. 1545-0172 20

120

Attachment Sequence No. 179

1

Attach to your tax return.

► Go to www.irs.gov/Form4562 for instructions and the latest information.

Name(s) shown on return	Busin	ess or activity	to which	Identifying number				
SOUTHWESTERN UNIVERSIT	PUE	BLIC M	EAL	74-1233796				
Part I Election To Expense Certain Propert	y Under Section 17	9 Note: If you ha	ave any lis	sted prope	rty, cc	mplete Part	V before y	ou complete Part I.
1 Maximum amount (see instructions)							1	1,040,000.
2 Total cost of section 179 property place								
3 Threshold cost of section 179 property								2,590,000.
4 Reduction in limitation. Subtract line 3 fi								
5 Dollar limitation for tax year. Subtract line 4 from line 1							5	
6 (a) Description of pro				less use only)		(c) Elected (
0		`	,	,				
					_			
					_			
7 Listed property. Enter the amount from								
8 Total elected cost of section 179 proper								
9 Tentative deduction. Enter the smaller								
10 Carryover of disallowed deduction from	line 13 of your 20	19 Form 4562					10	
11 Business income limitation. Enter the sn	naller of business	income (not less	s than zer	o) or line 5			11	
12 Section 179 expense deduction. Add lin	es 9 and 10, but	don't enter more	e than line	11 <u></u>	<u></u>		12	
13 Carryover of disallowed deduction to 20	21. Add lines 9 a	nd 10, less line 1	12	🕨 13	3			
Note: Don't use Part II or Part III below for li	isted property. Ins	stead, use Part \	/.					
Part II Special Depreciation Allowar	nce and Other De	epreciation (Do	n't includ	e listed pro	operty	.)		
14 Special depreciation allowance for quali	fied property (oth	er than listed pro	opertv) pla	aced in ser	vice d	urina		
the tax year	1 1 9 (0	14	
15 Property subject to section 168(f)(1) elec								
								69.
Part III MACRS Depreciation (Don't							10	
Inverte Depresidation (Den t		Section						
17 MACDS deductions for seasts placed in				<u> </u>			17	
17 MACRS deductions for assets placed in		0 0						
18 If you are electing to group any assets placed in service Section B - Assets							tion Syste	m
	(b) Month and	(c) Basis for dep		1				
(a) Classification of property	year placed	(business/investi only - see instru	ment use	(d) Recor perior	very d	(e) Convention	(f) Method	(g) Depreciation deduction
19a 3-year property								
b 5-year property								
c 7-year property								
d 10-year property								
e 15-year property								
f 20-year property								
g 25-year property				25 yr	s.		S/L	
h Desidential vental average	/			27.5 y	rs.	MM	S/L	
h Residential rental property	/			27.5 y	rs.	MM	S/L	
	/			39 yr	s.	MM	S/L	
i Nonresidential real property	/					MM	S/L	
Section C - Assets P	aced in Service	During 2020 Ta	x Year Us	sing the Al	terna	tive Depreci	ation Syst	tem
20a Class life							S/L	
b 12-year				12 yr	S.		S/L	
c 30-year	/			30 yr		ММ	S/L	
d 40-year	/			40 yr		MM	S/L	
Part IV Summary (See instructions.)	1 /			1 ⁴⁰ yr				1
	0.0						0.1	
21 Listed property. Enter amount from line		- 40 1001		· · · · · · · · · · · · · · · · · · ·			21	
22 Total. Add amounts from line 12, lines 1								60
Enter here and on the appropriate lines				ions - see i	nstr.		22	69.
23 For assets shown above and placed in s	-	-						
portion of the basis attributable to section	on 263A costs			23	3			

016251 12-18-20 LHA For Paperwork Reduction Act Notice, see separate Instructions. 07020506 794483 80158888 2020.05093 SOUTHWESTERN UNIVERSITY

For	rm 4562 (2020)	SOU	THWESTE	RN U	NIVE	SIT	Y					74-	1233	796	Page 2
P	art V Listed Proper	ty (Include a	utomobiles, ce	rtain oth	ner vehicl	es, cert	tain aircr	aft, and	d property	used for	r				0
	entertainment, Note: For any 24b, columns	vehicle for w	hich you are u	, sing the						e expens	e, comp	olete on	ily 24a,		
			on and Other I							nits for p	basseng	er auton	nobiles.)	
24a	a Do you have evidence to s	support the bu	siness/investme	nt use cla	aimed?	Y	'es	No	24b If "Y	es," is th	e evide	nce writt	ten?	Yes	No
	(a) Type of property (list vehicles first)	(b) Date placed in service	(c) Business/ investment use percentag		(d) Cost or ther basis		(e) sis for depre siness/inve use only	stment	(f) Recovery period	Met	g) :hod/ ention	Depre	(h) eciation uction	Ele sectio	(i) cted on 179
25	Special depreciation allo	owance for q	ualified listed	oroperty			e during	the ta	2						ost
	used more than 50% in						<u></u>				25				
26	Property used more that	n 50% in a qı 1	ualified busine I	ss use:											
		: :		6											
		: :		6											
	Durant to a f 500/ and	<u> </u>	•	6											
27	Property used 50% or le	1								0.1		1			
		: :		6						S/L -				-	
		: :		% %						S/L -				-	
	Add amounts in column	(b) lines 25			and on	line 01	nogo 1			S/L -	28			1	
	Add amounts in column												29		
29	Add amounts in column	(I), III e 20. E			B - Infori					<u></u>		<u></u>	29		
Co	mplete this section for ve	hicles used l	-							related	nerson	lf vou p	rovided v	ehicles	
	your employees, first ans										•				
,										9					
				(a)	(b)		(c)	(0	d)	(e)	(1	f)
30	Total business/investment	miles driven d	uring the		nicle	-	hicle		ehicle	Veh		-	nicle		icle
	year (don't include commu	ting miles)	-												
31	Total commuting miles														
	Total other personal (no														
	driven														
33	Total miles driven during														
	Add lines 30 through 32	2													
34	Was the vehicle availab	le for person	al use	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No
	during off-duty hours?														
35	Was the vehicle used p														
	than 5% owner or relate	ed person?							_						
36	Is another vehicle availa	ble for perso	nal												
	use?														
_			- Questions f		-				-						
	swer these questions to a	,		ception	to comp	leting S	Section E	for ve	hicles use	d by em	ployees	who a	ren't		
	re than 5% owners or rel			a la ila ita a			£							Vee	Ne
37	Do you maintain a writte		-						-	-				Yes	No
20	employees? Do you maintain a writte														
00	employees? See the ins		-	-											
39	Do you treat all use of v					-									
	Do you provide more th	,	, ,												
	the use of the vehicles,														
41	Do you meet the require														
	Note: If your answer to														
P	art VI Amortization	· · ·	·												
	(a)	(k.	Dete	(b)		(c)			(d)		(e)		A -	(f)	
	Description o	r costs		amortization begins		Amortizat amount			Code section		Amortiza period or per			mortization or this year	
42	Amortization of costs th	at begins du	ring your 2020) tax yea	ır:										
				: :											
				: :											
	Amortization of costs th											43			
<u>44</u>	Total. Add amounts in o	column (f). Se	e the instructi	ons for	where to	report						44			
0162	252 12-18-20					~ -							F	orm 456	2 (2020)

95 2020.05093 SOUTHWESTERN UNIVERSITY 80158881

Sales of Business Property (Also Involuntary Conversions and Recapture Amounts Under Sections 179 and 280F(b)(2)) ► Attach to your tax return.

	OMB No. 1545-0184
	2020
	Attachment Sequence No. 27
Ide	entifying number

► Go to www.irs.gov/Form4797 for instructions and the latest information.

74-1233796)

SOUTHWESTERN UNIVERSITY

1 Enter the gross proceeds from sales or exchanges reported to you for 2020 on Form(s) 1099-B or 1099-S (or substitute statement) that you are including on line 2, 10, or 20

Part I Sales or Exchanges of Property Used in a Trade or Business and Involuntary Conversions From Other Than Casualty or Theft-Most Property Held More Than 1 Year (see instructions)

2	(a) Description of property	(b) Date acquired (mo., day, yr.)	(C) Date sold (mo., day, yr.)	(d) Gross sales price	(e) Depreciation allowed or allowable since acquisition	(f) Cost or basis, plu improvement expense of	us ts and	(g) Gain or (loss) Subtract (f) from the sum of (d) and (e)
								50 500
SE	E STATEMENT 5							58,763.
3	Gain, if any, from Form 4684, line 39						3	
4	Section 1231 gain from installment s						4	
5	Section 1231 gain or (loss) from like-	kind exchanges [.]	from Form 8824				5	
6	Gain, if any, from line 32, from other						6	
7	Combine lines 2 through 6. Enter the						7	58,763.
	Partnerships and S corporations. line 10, or Form 1120-S, Schedule K				or Form 1065, Sch	edule K,		
	Individuals, partners, S corporation from line 7 on line 11 below and skip 1231 losses, or they were recaptured the Schedule D filed with your return							
8	Nonrecaptured net section 1231 los	ses from prior ye	ars. See instruct	tions			8	
9	Subtract line 8 from line 7. If zero or	less, enter -0 If	line 9 is zero, en	ter the gain from li	ne 7 on line 12 bel	ow. If		
	line 9 is more than zero, enter the an	nount from line 8	on line 12 below	w and enter the ga	in from line 9 as a	ong-term		
	capital gain on the Schedule D filed	with your return.	See instructions	3			9	58,763.

Part II Ordinary Gains and Losses (see instructions)

10	Ordinary gains and losses not include	had on lines 11 th	rough 16 (inclu	do proporty hold	1 year or less):				
10	Ordinary gains and losses not includ			T T T T T T T T T T T T T T T T T T T					
11	Loss, if any, from line 7			-			11	()
12	Gain, if any, from line 7 or amount f	om line 8, if appl	icable				12		
13	Gain, if any, from line 31						13		
14	Net gain or (loss) from Form 4684, li						14		
15	Ordinary gain from installment sales						15		
16	Ordinary gain or (loss) from like-kind						16		
17	Combine lines 10 through 16						17		
18	For all except individual returns, ent								
	a and b below. For individual return	s, complete lines	a and b below.						
а	If the loss on line 11 includes a loss t	rom Form 4684,	line 35, column	(b)(ii), enter that p	part of the loss	here. Enter the			
	loss from income-producing property	on Schedule A (Form 1040). line	16. (Do not inclu	ude anv loss or	n property used			
	loss from income-producing property on Schedule A (Form 1040), line 16. (Do not include any loss on property used as an employee.) Identify as from "Form 4797, line 18a." See instructions								
h	Redetermine the gain or (loss) on line						<u>18a</u>		
	(Form 1040), Part I, line 4	0					18b		

LHA For Paperwork Reduction Act Notice, see separate instructions.

Form 4797 (2020)

(b) Date acquired (c) Date sold 19 (a) Description of section 1245, 1250, 1252, 1254, or 1255 property: (mo., day, yr.) (mo., day, yr.) Δ В С D These columns relate to the properties on **Property A Property B Property C Property D** lines 19A through 19D. 20 Gross sales price (Note: See line 1 before completing.) 20 21 21 Cost or other basis plus expense of sale 22 Depreciation (or depletion) allowed or allowable 22 Adjusted basis. Subtract line 22 from line 21 23 23 24 Total gain. Subtract line 23 from line 20 24 If section 1245 property: 25 a Depreciation allowed or allowable from line 22 25a 25b b Enter the smaller of line 24 or 25a 26 If section 1250 property: If straight line depreciation was used, enter -0- on line 26g, except for a corporation subject to section 291. **a** Additional depreciation after 1975. See instructions 26a b Applicable percentage multiplied by the smaller of line 24 or line 26a. See instructions 26b c Subtract line 26a from line 24. If residential rental property or line 24 isn't more than line 26a, skip lines 26d and 26e 260 d Additional depreciation after 1969 and before 1976 26d e Enter the smaller of line 26c or 26d 26e **f** Section 291 amount (corporations only) 26f 26g g Add lines 26b, 26e, and 26f If section 1252 property: Skip this section if you didn't dispose of farmland or if this form is being completed for 27 a partnership. a Soil, water, and land clearing expenses 27a **b** Line 27a multiplied by applicable percentage 27b c Enter the smaller of line 24 or 27b 27c 28 If section 1254 property: a Intangible drilling and development costs, expenditures for development of mines and other natural deposits, 28a mining exploration costs, and depletion. See instructions b Enter the smaller of line 24 or 28a 28b 29 If section 1255 property: a Applicable percentage of payments excluded 29a from income under section 126. See instructions b Enter the smaller of line 24 or 29a. See instructions 29b Summary of Part III Gains. Complete property columns A through D through line 29b before going to line 30.

Part III Gain From Disposition of Property Under Sections 1245, 1250, 1252, 1254, and 1255 (see instructions)

30 Total gains for all properties. Add property columns A through D, line 24 31 Add property columns A through D, lines 25b, 26g, 27c, 28b, and 29b. Enter here and on line 13 31 Subtract line 31 from line 30. Enter the portion from casualty or theft on Form 4684, line 33. Enter the portion from other than casualty or theft on Form 4797, line 6

Part IV Recapture Amounts Under Sections 179 and 280F(b)(2) When Business Use Drops to 50% or Less (see instructions)

			(a) Section 179	(b) Section 280F(b)(2)
33	Section 179 expense deduction or depreciation allowable in prior years	33		
34	Recomputed depreciation. See instructions	34		
35	Recapture amount. Subtract line 34 from line 33. See the instructions for where to report	35		
0180	12 12-18-20			Form 4797 (2020)

07020506 794483 80158888

97 2020.05093 SOUTHWESTERN UNIVERSITY

80158881

SOUTHWESTERN UNIVERSITY

74-1233796

FORM 4797 PROPERTY HEI			D MORE THAT	N ONE YEAR	ST.	ATEMENT 5
DESCRIPTION	DATE ACQUIRED	DATE SOLD	SALES PRICE	DEPR.	COST OR BASIS	GAIN OR LOSS
CCPEP VIII CCNRP VIII CCNRP IX CCSSGPE FUND CCNRP X CCSSGPE FUND II CNRP XI CCSSGPE FUND III						378. -8,703. -95. 47,201. 15,167. 1,159. 2,730. 926.
TOTAL TO 4797, PA	ART I, LINE	2				58,763.

SOUTHWESTERN UNIVERSITY

Sales of Business Property (Also Involuntary Conversions and Recapture Amounts Under Sections 179 and 280F(b)(2)) Attach to your tax return.

	OMB No. 1545-0184
	2020
	Attachment Sequence No. 27
Ide	entifying number

► Go to www.irs.gov/Form4797 for instructions and the latest information.

74-1233796	

1 Enter the gross proceeds from sales or exchanges reported to you f	for 2020 on Form(s) 1099-B or 1099-S
(or substitute statement) that you are including on line 2, 10, or 20	

Part I Sales or Exchanges of Property Used in a Trade or Business and Involuntary Conversions From Other Than Casualty or Theft-Most Property Held More Than 1 Year (see instructions)

2	(a) Description of property	(b) Date acquired (mo., day, yr.)	(C) Date sold (mo., day, yr.)	(d) Gross sales price	(e) Depreciation allowed or allowable since acquisition	(f) Cost or basis, plu improvement expense of	is s and	(g) Gain or (loss) Subtract (f) from the sum of (d) and (e)
3	Gain, if any, from Form 4684, line 39						3	
4	Section 1231 gain from installment s						4	
5	Section 1231 gain or (loss) from like-						5	
6	Gain, if any, from line 32, from other	than casualty or	theft				6	
7	Combine lines 2 through 6. Enter the						7	58,763.
	Partnerships and S corporations. line 10, or Form 1120-S, Schedule K			•	or Form 1065, Sch	edule K,		
	Individuals, partners, S corporatio from line 7 on line 11 below and skip 1231 losses, or they were recaptured the Schedule D filed with your return	lines 8 and 9. If d in an earlier yea	line 7 is a gain a ar, enter the gair	nd you didn't have from line 7 as a lo	e any prior year sec	ction		
8	Nonrecaptured net section 1231 los	ses from prior ye	ars. See instruct	ions			8	
9	Subtract line 8 from line 7. If zero or	less, enter -0 If	line 9 is zero, en	ter the gain from li	ne 7 on line 12 bel	ow. If		
	line 9 is more than zero, enter the ar	nount from line 8	on line 12 below	w and enter the ga	in from line 9 as a	ong-term		
	capital gain on the Schedule D filed	with your return.	See instructions	s			9	58,763.

Part II Ordinary Gains and Losses (see instructions)

10	Ordinary gains and losses not include	d on lines 11 th	rough 16 (inclue	de property held 1	year or less):				
11	Loss, if any, from line 7						11	()
12	Gain, if any, from line 7 or amount from	m line 8, if appl	icable				12		
13	Gain, if any, from line 31						13		
14	Net gain or (loss) from Form 4684, line						14		
15	Ordinary gain from installment sales fi						15		
16	Ordinary gain or (loss) from like-kind e						16		
17	Combine lines 10 through 16						17		
18	For all except individual returns, enter	the amount fro	om line 17 on the	e appropriate line	of your return and s	skip lines			
	a and b below. For individual returns,	complete lines	a and b below.						
а	If the loss on line 11 includes a loss fro	m Form 4684,	line 35, column	(b)(ii), enter that p	art of the loss here.	Enter the			
	loss from income-producing property of	n Schedule A (Form 1040), line	16. (Do not inclu	de any loss on prop	erty used			
	as an employee.) Identify as from "Forr	n 4797, line 18	a." See instructi	ons			18a		
b	Redetermine the gain or (loss) on line 1								
	(Form 1040), Part I, line 4						18b		

LHA For Paperwork Reduction Act Notice, see separate instructions.

Form 4797 (2020)

Page 2

0 Gross sales price (Note: See line 1 before completing.) 20 21 21 1 Cost or other basis plus expense of sale 21 22 2 Depreciation (or depletion) allowed or allowable 22 23 3 Adjusted basis. Subtract line 23 from line 21 23 23 4 Total gain. Subtract line 23 from line 22 25a 25b 5 If section 1260 property: 18 section 1260 property: 25b 6 If section 1275. See instructions 25a 4 Additional depreciation after 1975. See instructions 26a 5 Subtract line 26a from line 24. If residential rental property or line 24 in the 26a, skip lines 26a and 26e 26d 6 Subtract line 26a from line 24. If residential rental property or line 24 form 1975. 28d 26d 7 It section 291 amount (corporations only) 26d 9 Add lines 26b, 26e, and 26f 26d 9 Add line 24 or 27b 26g 16 Section 291 amount (corporations only) 26d 17 Heelon 1252 property: 26d 18 Section 1254 property: 26g 19 It section	(a) Description of section 1245, 1250, 1252, 1254, o	or 1255 p	property:			(b) Date acqui (mo., day, yr		(c) Date sold (mo., day, yr.)
C Property A Property A Property B Property C P D Cost or other basis plus expense of sale 21 21 22 24 24 24 24 25 26 27 26 26 27 26 27 26<	Α							
D These columns relate to the properties on lines 19A through 19D. Property A Property B Property C P 0 Gross sales price (Note: Sel line 1 before completing). 20 20 21 22 22 23 24 23 24 23 24 23 24 23 24 23 24 24 24 24 24 24 25 25 25 25 25 25 25 25 25 25 25 25 25 25 25 25 25 25 25 26 <th>В</th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th>	В							
These columns relate to the properties on lines 198 through 190. Property A Property A Property B Property C P Gross sates price (Note: See line 1 before completing) Cost or other basis plus expense of sale 21	C							
lines 19A through 19D. Property A Property B Property C P g fores sales price (Note: See line 1 before completing.) 20	D							
or costs sales price (Note: See line 1 before completing.) 20 21 Cost or other basis plus expense of sale 21 21 Depreciation of codeption) allowed or allowable 22 24 Adjusted basis. Subtract line 22 from line 21 23 24 Total gain. Subtract line 23 from line 21 23 24 Bepreciation allowed or allowable from line 22 256 255 If section 1250 property: 255 255 If section 1250 property: If straight line depreciation was used, enter -0 on line 20, except for a corporation subject to section 291. 266 a Additional depreciation after 1975. See instructions 26a 26a c Subtract line 26a from line 26a, skip line 26a, skip lines 26a and and 26e 266 c Subtract line 26a from line 26a, skip line 26a, skip lines 26a and 26e 266 d Additional depreciation after 1975. Zes distructions 26a g Add lines 26b, 26e, and 26f 266 d Additional depreciation after 1976 26d g Add lines 26b, 26e, and 26f 26g f Section 291 amount (corporations only) 26f g Add lines 26b, 26e, and 26f 26g f H section 1252 property: Sibit section if you ddn't dispose of famade of thits for			Property A	Property	в	Property	с	Property D
1 Cost or other basis plus expense of sale 21 2 2 2 4 Adjusted basis. Subtract line 22 from line 20 24 5 Total gain. Subtract line 23 from line 20 24 6 1 1 7 1 1 7 1 1 8 Depreciation allowed or allowable from line 22 25a 9 1 1 1 9 1 1 1 9 1 1 25b 1 9 1 1 1 25c 1 9 1 1 1 25c 1 1 9 1 1 1 25c 1 1 1 1 1 1 25c 1<	Gross sales price (Note: See line 1 before completing.)	20						
Depreciation (or depletion) allowed or allowable in 21 23 24 23 Adjusted basis. Subtract line 22 from line 20 24 24 24 If section 1245 property: 25a 25a 25a 25a Depreciation allowed or allowable from line 22 25a 25a 25a 25a If section 1250 property: 15trait plan. Subtract line 24 or 25a 25b 26b 25a If section 1250 property: 15trait plan. Subtract line 26, geo, except for a corporation subject to section 291. 26a 26a 26b A dditional depreciation after 1975. See instructions 26a 26a 26b 26b 26b 26b 26b 26a 26b 26c 27a 27a 27a 27a 27a 27a 27a 27a		21						
Adjusted basis. Subtract line 22 from line 21 23 24 Total gain. Subtract line 23 from line 20 24 24 If section 1250 property: 256 268 Definition of line 24 or 25a 256 256 Meter of 1250 property: 256 268 A dditional depreciation allowed or allowable from line 22. 256 268 Meter of 1250 property: 256 268 A dditional depreciation after 1975. See instructions 268 268 A opport of line 24 or line 258, skep thor a corporation subject to section 291. 266 266 C Subtract line 26a from line 24. If residential rental line 250, skep lines 260 and 26e 266 266 C Subtract line 26a from line 24. If residential rental line 250, skep lines 260, 266, and 26e 266 266 C Subtract lines 260, 26e, and 26f 266 266 266 If section 129 amount (corporations only) 26f 26g 27a 27a J blines 260, 26e, and 26f 27a 27a 27a 27a 27a J blines 27a with water, and land clearing expenses. 27a 27a 27a 27a 27a 27a 27a 27a 27a	ſ	22						
Total gain. Subtract line 23 from line 20. 24	ſ	23						
if section 1245 property: 25a 25b a Depreciation allowed or allowable from line 22: 25b 25b if section 1250 property: If straight line depreciation was used, enter -0- on line 26g, except for a corporation subject to section 281. 25b a Additional depreciation after 1975. See instructions 26a 26a 26a b Applicable percentage multiplied by the smaller of line 24 or 18e 26, skip lines 26d and 26e 26b 26c c Subtract line 26a from line 24. If residential rental property or line 24 lish it more than line 26a, skip lines 26d and 26e 26c 26d d Additional depreciation after 1969 and before 1976. 26d 26d 26d g Add dines 26b, 26e, and 26t 26d 26d 26d 26d g Add lines 26b, 26e, and 26t 27a 26d 27a 27a 27a b Line 27a multiplied by applicable percentage 27b 27b 27a 2	ſ							
a Depreciation allowed or allowable from line 22 25a 25b b Enter the smaller of line 24 or 25a 25b 25b a Additional depreciation was used, enter -0- on line 26g, except for a corporation subject to section 291. a Additional depreciation after 1975. See instructions 26a b Applicable percentage multiplied by the smaller of line 24 or 126a. See instructions 26a 26a 26b c Subtract line 26a from line 24. If residential rental property or line 24 is not methan line 26a, skip lines 26b and 26e 26d 26d 26d d Additional depreciation after 1969 and before 1976 26d 26d 26d 26d 26d d Additional depreciation after 1969 and before 1976 26d 27a 27a <td< td=""><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></td<>								
b Enter the smaller of line 24 or 25a 25b		25a						
if section 1250 property: If straight line depreciation was used, enter -0- on line 28g, except for a corporation subject to section 291. 26a a Additional depreciation after 1975. See instructions 26a b Applicable percentage multiplied by the smaller of line 26a. See instructions 26a c Subtract line 26a from line 24. If residential rental property or line 24 is it more than line 26a, skip lines 26d and 26e 26d c Additional depreciation after 1969 and before 1976 26d d Additional depreciation after 1969 and before 1976 26d e Enter the smaller of line 26c or 26d 26e f Section 291 amount (corporations only) 26f g Add lines 26b, 26e, and 26f 26g a Soli, water, and land clearing expenses 27a a Soli, water, and land clearing expenses 27a b Line 27a multiplied by applicable percentage 27b c Enter the smaller of line 24 or 27b 27c if Section 1254 property: 28a a Applicable percentage of payments excluded from income under section 128, spenditures for development of 28, spenditures for development of 28, spenditures to development of 28, spenditures	ſ							
was used, enter -0- on line 25g, except for a corporation subject to section 291. 26a a Additional depreciation after 1975. See instructions 26a b Applicable percentage multiplied by the smaller of line 24 or line 26a. See instructions 26a c Subtract line 26a from line 24, if residential rental property or line 24 isn't more than line 26a, skip lines 24 dand 26e 26c d Additional depreciation after 1969 and before 1976 26d d Additional depreciation after 1969 and before 1976 26d g Add lines 26b, 26e, and 26f 26e f Section 291 amount (corporations only) 26f g Add lines 26b, 26e, and 26f 26g f section 1252 property: Skip this section if you ddn't dispose of farmland or if this form is being completed for a partinersitip. 27a a Soil, water, and land clearing expenses 27a b Line 27a multiplied by applicable percentage 27b z To 27c f H section 1254 property: 28a a Intanjble d'inling and development costs, expenditures for development of mines and other natural deposits, iming exploration costs, and depleton. See instructions 28a b Enter the smaller of line 24 or 28a 28b J H section 1254 property: 28a Applicable percentage of payment sexulcided from income under section		230						
b Applicable percentage multiplied by the smaller of line 24 or line 26a. See instructions 26b c Subtract line 26a from line 24. If residential rental property or line 24 usn't more than line 26a, skip lines 26d and 26e 26d d Additional depreciation after 1969 and before 1976 26d e Enter the smaller of line 26c or 26d 26e f Section 291 amount (corporations only) 26f g Add lines 26b, 26e, and 26f 26g f Section 291 amount (corporations only) 26f g Add lines 26b, 26e, and 26f 27a if section 1252 property. Skip this section if you didn't dispose of farmland or if this form is being completed for a partnership. 27a a Soll, water, and land clearing expenses 27b b Line 27a multiplied by applicable percentage 27b if section 1254 property: 27a a Intanjible drilling and development to sits, sependitures for development of mines and other natural deposits, mining exploration costs, and depleton. See instructions 28a b Enter the smaller of line 24 or 28a. 28b b Enter the smaller of line 24 or 28a. 28b j f section 125. Sproperty: 29b a Applicable percentage of payments excluded from income under sectuations 29b j f section 125. Sproperty: 31 <	was used, enter -0- on line 26g, except for a corporation							
of line 24 or line 26a. See instructions 26b 26c c Subtract line 26a from line 24. If residential rental property or line 24 isn't more than line 26a, skip lines 26d and 26e 26c d Additional depreciation after 1969 and before 1976 26d 26c d Additional depreciation after 1969 and before 1976 26d 26d g Add lines 26b, 26e, and 26f 26g 26g f Section 291 amount (corporations only) 26f 26g g Add lines 26b, 26e, and 26f 26g 27a l Soli, water, and land clearing expenses 27a 27a b Line 27a multiplied by applicable percentage 27b 27c c Enter the smaller of line 24 or 27b 27c 27c l H section 1254 property: and and then ratural deposits, mining exploration costs, expenditures tor development or mise and other natural deposits, mining exploration costs, and depletion. See instructions 28a b Inter the smaller of line 24 or 28a. 28b 29b 29a utmmary of Part III Gains. Complete property columns A through D, line 24 30 31 Add property columns A through D, line 24b. Zero, 28b, and 28b. Enter here and on line 13 31 Subtract line 31 from line 30. Enter the portion from casualty or theft on Form 4684, line 33. Enter the portion form casua	a Additional depreciation after 1975. See instructions	26a						
property or line 24 isn't more than line 26a, skip lines 26d and 26e 26c 26d d Additional depreciation after 1969 and before 1976 26d 26d e Enter the smaller of line 26c or 26d 26e 26e g Add lines 26b, 26e, and 26f 26g 26g g Add lines 26b, 26e, and 26f 26g 26g g Add lines 26b, 26e, and 26f 26g 26g g Add lines 26b, 26e, and 26f 26g 27a g Add lines 26b, 26e, and 26f 26g 27a g Add lines 26b, 26e, and 26f 26g 27a g Soli, water, and land clearing expenses 27b 27b g Inaction 1254 property: 27b 27c a Intanglike depoment costs, expenditures for development costs, expenditures for development osts, and depletion. See instructions 28a b Enter the smaller of line 24 or 28a 28b 28a y resction 1255 property: 28a 29b a Applicable percentage of payments excluded from income under section 126. See instructions 29a y applicable percentage of payments excluded from income under section 26. See instructions 29a y applicable percentage of payments excluded from income under section 126. See instructions 29a	b Applicable percentage multiplied by the smaller of line 24 or line 26a. See instructions	26b						
d Additional depreciation after 1969 and before 1976 26d 26d e Enter the smaller of line 26c or 26d 26e 26e f Section 291 amount (corporations only) 26f 26g g Add lines 26b, 26e, and 26f 26g 26g f I section 1252 property: Skip this section if you didn't dispose of farmland or if this form is being completed for a partnership. 27a a Soli, water, and land clearing expenses 27a b Line 27a multiplied by applicable percentage 27b c Enter the smaller of line 24 or 27b 27c 3 If section 1254 property: and pelption. See instructions a Intrapible drilling and development costs, expenditures for development of mines and other natural deposits, mining exploration costs, and depletion. See instructions 28a b First the smaller of line 24 or 28a 28b b If section 1255 property: 29a a Applicable percentage of payments excluded from income under section 126. See instructions 29a ummary of Part III Gains. Complete property columns A through D through line 29b before going to line 30. 31 2 Subtract line 31 from line 30. Enter the portion from casualty or theft on Form 4797, line 6 32 Part IV Recapture Amounts Under Sections 179 and 280F(b)(2) When Business Use Drops to 50% or Lest (see instructions) 31 <td>property or line 24 isn't more than line 26a, skip</td> <td>26c</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>	property or line 24 isn't more than line 26a, skip	26c						
e Enter the smaller of line 26c or 26d 26e		26d						
f Section 291 amount (corporations only) 26f 20g g Add lines 26b, 26e, and 26f 20g 20g If section 1252 property: Skip this section if you didn't dispose of farmland or if this form is being completed for a partnership. 27a 27b a Soil, water, and land clearing expenses 27c 27b 27c b Line 27a multiplied by applicable percentage 27c 27c 27c a Intangible difiling and development costs, expenditures for development of mines and other natural deposits, mining exploration costs, and depletion. See instructions 28a 28b 28a b Enter the smaller of line 24 or 28a. 28b 29a 29a 29a 29a If section 1255 property: 29b 29b 29a 29b 29a 29a ummary of Part III Gains. Complete property columns A through D, line 24 30 31 31 Add property columns A through D, lines 25b, 26g, 27c, 28b, and 29b. Enter here and on line 13 31 31 Subtract line 31 from line 30. Enter the portion from casualty or theft on Form 4797, line 6 32 32 Y Recapture Amounts Under Sections 179 and 280F(b)(2) When Business Use Drops to 50% or Lest (see instructions) 32 32	ſ							
g Add lines 26b, 26e, and 26f 26g								
g Add lines 26b, 26e, and 26f 26g	f Section 201 amount (corporations only)	26f						
If section 1252 property: Skip this section if you didn't dispose of farmland or if this form is being completed for a partnership. 27a a Soil, water, and land clearing expenses 27b 27c b Line 27a multiplied by applicable percentage 27b 27c c Enter the smaller of line 24 or 27b 27c 3 a Intangible drilling and development costs, expenditures for development of mines and other natural deposits, mining exploration costs, and depletion. See instructions 28a 9 b Enter the smaller of line 24 or 28a 28b 9 9 If section 1255 property: 28a 29a 9 a Applicable percentage of payments excluded from income under section 126. See instructions 29a 29a 9 ummary of Part III Gains. Complete property columns A through D, line 24 30 31 2 Subtract line 31 from line 30. Enter the portion from casualty or theft on Form 4684, line 33. Enter the portion from other than casualty or theft on Form 4797, line 6 32 Part IV Recapture Amounts Under Sections 179 and 280F(b)(2) When Business Use Drops to 50% or Lest (see instructions) 32								
b Line 27a multiplied by applicable percentage 27b	If section 1252 property: Skip this section if you didn't dispose of farmland or if this form is being completed for a partnership.							
c Enter the smaller of line 24 or 27b 27c								
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a Intangible drilling and development costs, expenditures for development of mines and other natural deposits, mining exploration costs, and depletion. See instructions 28a 28b b Enter the smaller of line 24 or 28a 28b 28b 29a If section 1255 property: a Applicable percentage of payments excluded from income under section 126. See instructions 29a 29a 29a Jummary of Part III Gains. Complete property columns A through D through line 29b before going to line 30. 30 31 • Total gains for all properties. Add property columns A through D, line 24 30 31 • Subtract line 31 from line 30. Enter the portion from casualty or theft on Form 4797, line 6 31 32 * art IV Recapture Amounts Under Sections 179 and 280F(b)(2) When Business Use Drops to 50% or Les (see instructions) 32		27c				1		
b Enter the smaller of line 24 or 28a 28b	a Intangible drilling and development costs, expenditures for development of mines and other natural deposits,	28a						
a Applicable percentage of payments excluded from income under section 126. See instructions 29a b Enter the smaller of line 24 or 29a. See instructions 29b ummary of Part III Gains. Complete property columns A through D through line 29b before going to line 30. 0 Total gains for all properties. Add property columns A through D, line 24 1 Add property columns A through D, lines 25b, 26g, 27c, 28b, and 29b. Enter here and on line 13 2 Subtract line 31 from line 30. Enter the portion from casualty or theft on Form 4684, line 33. Enter the portion from casualty or theft on Form 4797, line 6 Part IV Recapture Amounts Under Sections 179 and 280F(b)(2) When Business Use Drops to 50% or Lead (see instructions) (a) Section (b)								
b Enter the smaller of line 24 or 29a. See instructions 29b ummary of Part III Gains. Complete property columns A through D through line 29b before going to line 30. 0 Total gains for all properties. Add property columns A through D, line 24 30 1 Add property columns A through D, lines 25b, 26g, 27c, 28b, and 29b. Enter here and on line 13 31 2 Subtract line 31 from line 30. Enter the portion from casualty or theft on Form 4684, line 33. Enter the portion from other than casualty or theft on Form 4797, line 6 32 Part IV Recapture Amounts Under Sections 179 and 280F(b)(2) When Business Use Drops to 50% or Lead (see instructions) (a) Section (b)	If section 1255 property: a Applicable percentage of payments excluded							
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Subtract line 31 from line 30. Enter the portion from casualty or theft on Form 4684, line 33. Enter the portion 32 from other than casualty or theft on Form 4797, line 6 32 vart IV Recapture Amounts Under Sections 179 and 280F(b)(2) When Business Use Drops to 50% or Les (see instructions) (a) Section (b)	Total gains for all properties. Add property columns	A throug	gh D, line 24				30	
Subtract line 31 from line 30. Enter the portion from casualty or theft on Form 4684, line 33. Enter the portion 32 from other than casualty or theft on Form 4797, line 6 32 vart IV Recapture Amounts Under Sections 179 and 280F(b)(2) When Business Use Drops to 50% or Les (see instructions) (a) Section (b)	Add property columns A through D lines 25h 26a (270 204	and 20h Entor ha	re and on line 19	2		21	
from other than casualty or theft on Form 4797, line 6 2art IV Recapture Amounts Under Sections 179 and 280F(b)(2) When Business Use Drops to 50% or Les (see instructions) (a) Section (b)		,	•					
Part IV Recapture Amounts Under Sections 179 and 280F(b)(2) When Business Use Drops to 50% or Les (see instructions) (a) Section (b)				004, III e 33. ENte		POLICIT	20	
(a) Section (b)	Part IV Recapture Amounts Under Section	6 ns 179	and 280F(b)(2)	When Busin	ess	Use Drops to	50%	or Less
							n	(b) Section 280F(b)(2)
Section 179 expense deduction or depreciation allowable in prior years 33	Section 170 expense deduction of degree stations -	wohle	prior vege		20			

100

07020506 794483 80158888

Recapture amount. Subtract line 34 from line 33. See the instructions for where to report

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Form 4797 (2020)

Limitation on Business Interest Expense Under Section 163(j)

OMB No. 1545-0123

Identification number 74-1233796

Attach to your tax return.

Go to www.irs.gov/Form8990 for instructions and the latest information.

Taxpayer name(s) shown on tax return SOUTHWESTERN UNIVERSITY

If Form 8990 relates to an information return for a foreign entity (for example, Form 5471), enter:

Name of foreign entity

Employer identification number, if any

Reference ID number
Part I Computation of Allowable Business Interest Expense

Part I is completed by all taxpayers subject to section 163(j). Schedule A and Schedule B need to be completed before Part I when the taxpayer is a partner or shareholder of a pass-through entity subject to section 163(j).

Section I - Business Interest Expense

1	Current year business interest expense (not including floor plan				
	financing interest expense), before the section 163(j) limitation	1			
2	Disallowed business interest expense carryforwards from prior				
	years. (Does not apply to a partnership)	2			
3	Partner's excess business interest expense treated as paid or				
	accrued in current year (Schedule A, line 44, column (h))	3	109.		
4	Floor plan financing interest expense. See instructions	4			
5	Total business interest expense. Add lines 1 through 4			5	109.

Section II - Adjusted Taxable Income

Taxable Income

6	Taxable income. See instructions	6	-827.

Additions (adjustments to be made if amounts are taken into account on line 6)

7	Any item of loss or deduction that is not properly allocable to a				
	trade or business of the taxpayer. See instructions	7			
8	Any business interest expense not from a pass-through entity. See				
	instructions	8			
9	Amount of any net operating loss deduction under section 172	9	60,832.		
10	Amount of any qualified business income deduction allowed under				
	section 199A	10			
11	Deduction allowable for depreciation, amortization, or depletion attributable				
	to a trade or business. See instructions	11	69.		
12	Amount of any loss or deduction items from a pass-through entity.				
	See instructions	12	356,801.		
13	Other additions. See instructions	13			
14	Total current year partner's excess taxable income (Schedule A, line				
	44, column (f))	14	33,561.		
15	Total current year S corporation shareholder's excess taxable				
	income (Schedule B, line 46, column (c))	15			
16	Total. Add lines 7 through 15			16	451,26

Reductions (adjustments to be made if amounts are taken into account on line 6)

17	Any item of income or gain that is not properly allocable to a trade				
	or business of the taxpayer. See instructions	17 ()		
18	Any business interest income not from a pass-through entity. See instructions	18 ()		
19	Amount of any income or gain items from a pass-through entity.				
	See instructions	19 (421,969.)		
20	Other reductions. See instructions	20 ()		
21	Total. Combine lines 17 through 20		🕨	21	(421,969.)
22	Adjusted taxable income. Combine lines 6, 16, and 21. (If zero or less, enter -0))		22	28,467.
	For Demonstrate Deduction Act Nation and the instructions				

LHA For Paperwork Reduction Act Notice, see the instructions.

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Secti	ion III - Business Interest Income				
23	Current year business interest income. See instructions	23			
24	Excess business interest income from pass-through entities (total of				
	Schedule A, line 44, column (g), and Schedule B, line 46, column (d))	24	1,525.		
25	Total. Add lines 23 and 24			25	1,525.
Secti	ion IV - Section 163(j) Limitation Calculations				
	Limitation on Business Intere	est Expense	1		
26	Multiply adjusted taxable income (line 22) by the applicable percentage. See				
	instructions	26	<u>14,234.</u> 1,525.		
27	Business interest income (line 25)	27	1,525.		
28	Floor plan financing interest expense (line 4)	28			
29	Total. Add lines 26, 27, and 28			29	15,759.
	Allowable Business Interes	t Expense			
30	Total current year business interest expense deduction. See instructions .			30	109.
	Carryforward				
31	Disallowed business interest expense. Subtract line 29 from line 5. (If zero of	or less, enter -	0)	31	
Part					
	l is only completed by a partnership that is subject to section 163(j). The partners re not carried forward by the partnership. See the instructions for more informati		w are allocated to the	he part	ners
	Excess Business Interest	Expense			
32	Excess business interest expense. Enter amount from line 31			32	
	Excess Taxable Income (If you entered an amou			rough	37.)
33	Subtract the sum of lines 4 and 25 from line 5. (If zero or less, enter -0)			33	
34	Subtract line 33 from line 26. (If zero or less, enter -0)			34	
35	Divide line 34 by line 26. Enter the result as a decimal. (If line 26 is zero, enter			35	
36	Excess taxable income. Multiply line 35 by line 22			36	
	Excess Business Interest	Income			
37	Excess business interest income. Subtract the sum of lines 1, 2, and 3 from	n line 25. (If zer	ro or		
	less, enter -0)			37	
Part	less, enter -0) III S Corporation Pass-Through Items				
Part I	II is only completed by S corporations that are subject to section 163(j). The S co he instructions for more information.	prporation item	s below are allocate	ed to th	e shareholders.
	Excess Taxable Inco	ome			
38	Subtract the sum of lines 4 and 25 from line 5. (If zero or less, enter -0)			38	
39	Subtract line 38 from line 26. (If zero or less, enter -0)			39	
40	Divide line 39 by line 26. Enter the result as a decimal. (If line 26 is zero, enter			40	
41	Excess taxable income. Multiply line 40 by line 22			41	
	Excess Business Interest	Income			
42	Excess business interest income. Subtract the sum of lines 1, 2, and 3 from	ı line 25. (lf zei	ro or		

023212 06-29-20

SCI	SCHEDULE A Summary of	Summary of Partner's Section 163(j) Excess Items	on 163(j) Exces	s Items					
Any	Any taxpayer that owns an interest in a partnership subject to section 163(i) should complete Schedule A before completing Part I.	partnership subject to	section 163(j) shoul	d complete Scheduk	e A before completir.	ig Part I.			
			Exces	Excess Business Interest Expense	Jense	(f) Current year	(g) Current year	(h) Excess business	(i) Current year
	(a) Name of partnership	(p) EIN	(c) Current year	(d) Prior year carryforward	(e) Total ((c) plus (d))	excess taxable income	excess business interest income	interest expense treated as paid or accrued (see instructions)	excess business interest expense carryforward ((e) minus (h))
43	CCSSGPE FUND II	81-2852078	.0	109.	109.	33,561.	1,525.	109.	0.
4	Total					33,561.	1,525.	109.	
SCI	ШB	Summary of S Corporation Shareholder's Excess Taxable Income and Excess Business Interest Income	areholder's Ex	cess Taxable In	come and Exce	ss Business Int	erest Income		
Any befo	Any taxpayer that is required to complete Part I and is a shareholder in an S corporation that has excess taxable income or excess business interest income should complete Schedule B before completing Part I.	te Part I and is a share.	holder in an S corp.	oration that has exce	ss taxable income or	r excess business int	erest income should	l complete Schedule	B
	(a) Nan	(a) Name of S corporation		-	(b) EIN	(c) Current year excess taxable income	r excess ome	(d) Current year excess business interest income	ear excess rest income
45									
46	Total						• 0		• 0

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SOUTHWESTERN UNIVERSITY	Business Interest Expense	rest Expense				74-1233796
	Description	Prior Disallowed Business Interest Expense	Business Interest Expense	Business Interest Expense Ratio	Limited Business Interest Expense	Disallowed Business Interest Expense
CCSSGFE FUND II			109.	1.0000	109.	
			0.			
Total		0.	109.	1.0000	109.	0.