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Form **990-PF**Department of the Treasury
Internal Revenue Service (77)**Return of Private Foundation**
or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation

OMB No 1545-0052

2009

Note The foundation may be able to use a copy of this return to satisfy state reporting requirements

For calendar year 2009, or tax year beginning , and ending

G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return
☐ Amended return ☐ Address change ☐ Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation The Shepard Broad Foundation, Inc		A Employer identification number 59-0998866
	Number and street (or P O box number if mail is not delivered to street address)	Room/suite	B Telephone number (see page 10 of the instructions) (305) 372-5790
	801 Brickell Ave	2350	
	City or town, state, and ZIP code Miami FL 33131		C If exemption application is pending, check here <input type="checkbox"/>
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 11,214,515		J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	
		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue				
1 Contributions, gifts, grants, etc., received (attach schedule)	1,344,571			
2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
3 Interest on savings and temporary cash investments	829	829		
4 Dividends and interest from securities	278,205	278,205		
5 a Gross rents				
b Net rental income or (loss)				
6 a Net gain or (loss) from sale of assets not on line 10	-409,428			
b Gross sales price for all assets on line 6a 2,265,279				
7 Capital gain net income (from Part IV, line 2)		0		
8 Net short-term capital gain				
9 Income modifications				
10 a Gross sales less returns and allowances				
b Less Cost of goods sold				
c Gross profit or (loss) (attach schedule)				
11 Other income (attach schedule)				
12 Total. Add lines 1 through 11	1,214,177	279,034		
Operating and Administrative Expenses				
13 Compensation of officers, directors, trustees, etc.				
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16 a Legal fees (attach schedule)				
b Accounting fees (attach schedule)				
c Other professional fees (attach schedule)	47,083	47,083		
17 Interest				
18 Taxes (attach schedule) (see page 14 of the instructions)	1,671	71		
19 Depreciation (attach schedule) and depletion				
20 Occupancy	25,643			25,643
21 Travel, conferences, and meetings	2,518			2,518
22 Printing and publications				
23 Other expenses (attach schedule)	38,606	69		38,537
24 Total operating and administrative expenses. Add lines 13 through 23	115,521	47,223		66,698
25 Contributions, gifts, grants paid	1,160,266			1,131,106
26 Total expenses and disbursements. Add lines 24 and 25	1,275,787	47,223		1,197,804
27 Subtract line 26 from line 12				
a Excess of revenue over expenses and disbursements	-61,610			
b Net investment income (if negative, enter -0-)		231,811		
c Adjusted net income (if negative, enter -0-)				

For Privacy Act and Paperwork Reduction Act Notice, see page 30 of the instructions.

(HTA)

Form **990-PF** (2009)

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Part II Balance Sheets		Beginning of year	End of year	
			(a) Book Value	(b) Book Value
Assets	1 Cash—non-interest-bearing			
	2 Savings and temporary cash investments	576,596	810,838	810,838
	3 Accounts receivable ▶			
	Less allowance for doubtful accounts ▶	335		
	4 Pledges receivable ▶			
	Less allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ 100,000			
	Less allowance for doubtful accounts ▶	100,000	100,000	100,000
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges	1,500	1,500	1,500
	10 a Investments—U S and state government obligations (attach schedule)	695,094	673,999	694,340
	b Investments—corporate stock (attach schedule)	8,741,329	8,340,760	7,888,674
	c Investments—corporate bonds (attach schedule)	1,415,347	1,541,494	1,569,163
Liabilities	11 Investments—land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)			
	14 Land, buildings, and equipment basis ▶ 30,378			
	Less accumulated depreciation (attach schedule) ▶ 30,378			
	15 Other assets (describe ▶ SEE ATTACHMENT)	150,000	150,000	150,000
	16 Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	11,680,201	11,618,591	11,214,515
	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ▶ <input type="checkbox"/>			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input checked="" type="checkbox"/>			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds	11,680,201	11,618,591	
	30 Total net assets or fund balances (see page 17 of the instructions)	11,680,201	11,618,591	
	31 Total liabilities and net assets/fund balances (see page 17 of the instructions)	11,680,201	11,618,591	

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	11,680,201
2 Enter amount from Part I, line 27a	2	-61,610
3 Other increases not included in line 2 (itemize) ▶	3	0
4 Add lines 1, 2, and 3	4	11,618,591
5 Decreases not included in line 2 (itemize) ▶	5	0
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	11,618,591

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a Publicly-traded Securities				
b				
c				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a 2,265,279		2,674,707	-409,428	
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))	
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any		
a				
b				
c				
d				
e				
2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }			2	-409,428
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8 }			3	

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank.

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2008	1,448,760	10,851,068	0.133513
2007	1,628,040	12,556,722	0.129655
2006	861,923	11,292,346	0.076328
2005	612,416	9,481,850	0.064588
2004	474,956	8,571,195	0.055413
2 Total of line 1, column (d)			2 0.459497
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years			3 0.091899
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5			4 9,517,970
5 Multiply line 4 by line 3			5 874,692
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 2,318
7 Add lines 5 and 6			7 877,010
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions on page 18.			8 1,197,804

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1 a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		1	2,318
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b			
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	0
3 Add lines 1 and 2		3	2,318
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	
5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		5	2,318
6 Credits/Payments			
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a	6,415	
b Exempt foreign organizations—tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c	0	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments Add lines 6a through 6d	7	6,415	
8 Enter any penalty for underpayment of estimated tax Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	0	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	0	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	4,097	
11 Enter the amount of line 10 to be Credited to 2010 estimated tax 2,400 Refunded	11	1,697	

Part VII-A Statements Regarding Activities

	Yes	No
1 a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ _____ (2) On foundation managers \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?	N/A	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either o By language in the governing instrument, or ● By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
8 a Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) FL		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page 27)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
Website address <input type="checkbox"/> _____				
14	The books are in care of <input type="checkbox"/> c/o Foundation Source	Telephone no <input type="checkbox"/>	(800) 839-1754	
	Located at <input type="checkbox"/> 501 Silverside Road, Suite 123, Wilmington, DE	ZIP+4 <input type="checkbox"/>	19809-1377	
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here and enter the amount of tax-exempt interest received or accrued during the year	<input type="checkbox"/>	15	

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required**File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.**

		Yes	No
1a	During the year did the foundation (either directly or indirectly)		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here <input type="checkbox"/>	1b	N/A
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009?	1c	X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years <input type="checkbox"/> 20____, <input type="checkbox"/> 20____, <input type="checkbox"/> 20____, <input type="checkbox"/> 20____		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see page 20 of the instructions)	2b	N/A
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here <input type="checkbox"/> 20____, <input type="checkbox"/> 20____, <input type="checkbox"/> 20____, <input type="checkbox"/> 20____		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If "Yes," did it have excess business holdings in 2009 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2009)	3b	N/A
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?	4b	X

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see page 22 of the instructions)

☒ Yes ☐ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No**b** If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the instructions)?**5b**

X

Organizations relying on a current notice regarding disaster assistance check here

☐**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?☐ Yes ☒ No

If "Yes," attach the statement required by Regulations section 53.4945–5(d)

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?☐ Yes ☒ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?**6b**

X

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?**7b**

N/A

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE ATTACHMENT				

2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the instructions). If none, enter "NONE."

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

Total number of other employees paid over \$50,000☐

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3 Five highest-paid independent contractors for professional services** (see page 23 of the instructions). If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services

**Part IX-A Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

Expenses

1 NONE	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see page 24 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2

Amount

1	
2	
All other program-related investments. See page 24 of the instructions.	
3	
Total. Add lines 1 through 3	0

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 24 of the instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	8,613,188
b	Average of monthly cash balances	1b	950,510
c	Fair market value of all other assets (see page 24 of the instructions)	1c	101,500
d	Total (add lines 1a, b, and c)	1d	9,665,198
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	9,665,198
4	Cash deemed held for charitable activities. Enter 1½ % of line 3 (for greater amount, see page 25 of the instructions)	4	144,978
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	9,520,220
6	Minimum investment return. Enter 5% of line 5	6	476,011

Part XI Distributable Amount (see page 25 of the instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	476,011
2a	Tax on investment income for 2009 from Part VI, line 5	2a	2,318
b	Income tax for 2009 (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	2,318
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	473,693
4	Recoveries of amounts treated as qualifying distributions	4	0
5	Add lines 3 and 4	5	473,693
6	Deduction from distributable amount (see page 25 of the instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	473,693

Part XII Qualifying Distributions (see page 25 of the instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26	1a	1,197,804
b	Program-related investments—total from Part IX-B	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	1,197,804
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	2,318
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	1,195,486

Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				473,693
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2009				
a From 2004	49,810			
b From 2005	159,571			
c From 2006	307,976			
d From 2007	1,011,466			
e From 2008	911,031			
f Total of lines 3a through e	2,439,854			
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 1,197,804				
a Applied to 2008, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)		0		
c Treated as distributions out of corpus (Election required—see page 26 of the instructions)				
d Applied to 2009 distributable amount				473,693
e Remaining amount distributed out of corpus	724,111			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	3,163,965			
b Prior years' undistributed income Subtract line 4b from line 2b		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions		0		
e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions			0	
f Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)				
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)	49,810			
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a	3,114,155			
10 Analysis of line 9				
a Excess from 2005	159,571			
b Excess from 2006	307,976			
c Excess from 2007	1,011,466			
d Excess from 2008	911,031			
e Excess from 2009	724,111			

Part XV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i>				
AHRC NEW YORK CITY FOUNDATION INC	N/A	509(a)(1)	General & Unrestricted	2,000
83 MAIDEN LN NEW YORK NY 10038				
AMERICAN FRIENDS OF THE TEL AVIV UNIV	N/A	509(a)(1)	General & Unrestricted	5,000
39 BROADWAY NEW YORK NY 10006				
AMERICAN SOCIETY FOR TECHNION	N/A	509(a)(1)	General & Unrestricted	5,000
55 E 59TH ST NEW YORK NY 10022				
AMlkids	N/A	509(a)(1)	General & Unrestricted	2,000
2413 MEXIA AVE TALLAHASSEE FL 32304				
ARC OF ORANGE COUNTY INC	N/A	509(a)(1)	General & Unrestricted	250
208 N COLUMBIA ST CHAPEL HILL NC 27514				
BARRY UNIVERSITY	N/A	509(a)(1)	General & Unrestricted	35,300
11300 NE 2ND AVE MIAMI SHORES FL 33161				
BET TZEDEK	N/A	509(a)(1)	Legal Services	1,000
145 S FAIRFAX AVE LOS ANGELES CA 90036				
BET TZEDEK	N/A	509(a)(1)	Charitable Event	2,000
145 S FAIRFAX AVE LOS ANGELES CA 90036				
BET TZEDEK	N/A	509(a)(1)	Charitable Event	500
145 S FAIRFAX AVE LOS ANGELES CA 90036				
BIG BROTHERS AND BIG SISTERS	N/A	509(a)(1)	General & Unrestricted	2,000
701 SW 27TH AVE MIAMI FL 33135				
BROAD BAY HARBOR K-8 CENTER PTA	N/A	509(a)(1)	General & Unrestricted	6,883
1155 93RD ST BAY HARBOR ISLANDS FL 33154				
BROAD BAY HARBOR K-8 CENTER PTA	N/A	509(a)(1)	Tiles of Tech, Tree of	1,250
1155 93RD ST BAY HARBOR ISLANDS FL 33154			Knowl , Leaf of Honor	
CA NETWORK EQUESTRIAN THERAPY	N/A	509(a)(2)	Charitable Event	500
21126 CHATSWORTH ST CHATSWORTH CA 91311				
CAMP FIESTA INC	N/A	509(a)(1)	General & Unrestricted	5,000
2750 NE 183 ST T1508 N MIAMI BEACH FL 33160				
CASA VALENTINA INC	N/A	509(a)(1)	General & Unrestricted	500
2990 SW 35TH AVE MIAMI FL 33133				
CENTER FOR ADVANCEMENT OF JEWISH ED	N/A	509(a)(1)	Righteous Pictures file	2,000
4200 BISCAYNE BLVD MIAMI FL 33137			"The Last Survivor"	
Total See Attached Statement			▶ 3a	1,160,265 *
b <i>Approved for future payment</i>				
* TOTAL Form 990-PF, Part I, Line 25, Column (a) and Part XV, Line 3a				\$1,160,266
Less grant made to a private foundation without exercising expenditure responsibility				\$ 29,160
TOTAL 990-PF, Part I, Line 25, Column (d):				\$1,131,106
Total			▶ 3b	0

Schedule B
(Form 990, 990-EZ,
or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, 990-EZ, or 990-PF.

OMB No. 1545-0047

2009

Name of the organization

Employer identification number

The Shepard Broad Foundation, Inc

59-0998866

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)() (enter number) organization

☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation

☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation

☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

Special Rules

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3 % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year. ▶ \$

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2 of its Form 990, or check the box on line H of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF.

Schedule B (Form 990, 990-EZ, or 990-PF) (2009)

(HTA)

Name of organization

The Shepard Broad Foundation, Inc

Employer identification number

59-0998866

Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	Shepard Broad Charitable Lead Annuity Trust c/o John M. Bussel, Trustee, 801 Brickell Ave Miami FL 33131 Foreign State or Province Foreign Country	\$ 1,344,571	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
2	 Foreign State or Province Foreign Country	\$ 0	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
3	 Foreign State or Province Foreign Country	\$ 0	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
4	 Foreign State or Province Foreign Country	\$ 0	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
5	 Foreign State or Province Foreign Country	\$ 0	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
6	 Foreign State or Province Foreign Country	\$ 0	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)

Form 990-PF, Part I, Line 16c - Other Professional Fees

TOTAL:		47,083	47,083	0	0
		(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purpose
1	Investment Management Services	47,083	47,083		0
2					
3					
4					
5					
6					
7					
8					
9					
10					

Form 990-PF, Part I, Line 18 - Taxes

TOTAL:					1,671	71	0	0
		(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purpose			
1	Estimated tax for 2009	1,600	0		0			
2	Foreign Tax Paid	71	71		0			
3								
4								
5								
6								
7								
8								
9								
10								

Form 990-PF, Part I, Line 23 - Other Expenses

TOTAL:					38,606	69	0	38,537
		(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purpose			
1	Administrative Fees	35,820	0		35,820			
2	State Fees	198	0		198			
3	Bank Fees	69	69		0			
4	Foundation Dues & Memberships	2,315	0		2,315			
5	Office Supplies	204	0		204			
6								
7								
8								
9								
10								

Part II, Line 7 (990-PF) - Other Notes

[illegible]

Form 990-PF, Part II, Line 10a - Investments: US & State Government Obligations

TOTAL:					660,879	673,999	694,340
	Description/Symbol/CUSIP Number	Shares	Line 10a - Column (b) Book Value	Line 10a - Column (c) Fair Market Value			
1	FANNIE MAE 931195 4.500% DUE 05-01-24 (31412PRQ6)	68,582	70,470	70,648			
2	FEDL HOME LN MTG CRPPOOL #A87388 5 0% 07/01/2039 (312934F56)	24,832	25,345	25,496			
3	FEDL HOME LN MTG CRPPOOL #G13174 5 00000% 06/01/23 (3128MBXB8)	20,648	21,210	21,628			
4	FHLM - 4 3750% - 04/15/2015 (31395RAR9)	9,535	9,361	9,782			
5	FHLM - 4.7500% - 07/15/2015 (31395VU23)	9,552	9,346	9,693			
6	FHLMC A3-6030 - 5 5000% - 07/01/2035 (31297RVX2)	30,170	30,030	31,724			
7	FHLMC A3-8736 - 6 0000% - 05/01/2035 (31297UV56)	26,719	27,307	28,551			
8	FHLMC A4-7333 - 5 0000% - 10/01/2035 (3128K8EE2)	17,687	16,697	18,178			
9	FHLMC B1-1771 - 5 0000% - 01/01/2019 (3129636G1)	10,355	10,403	10,973			
10	FHLMC C0-0604 - 6.0000% - 04/01/2028 (31292GU53)	18,685	19,116	20,089			
11	FHLMC C0-1726 - 6.0000% - 12/01/2033 (31292H4K7)	14,746	15,078	15,780			
12	FHLMC C9-0847 - 6 0000% - 08/01/2024 (31335H5G4)	27,770	28,553	29,605			
13	FHLMC G1-1736 - 5.0000% - 04/01/2020 (31283K4V7)	18,575	18,422	19,626			
14	FHLMC Gold 15-yr Fixed Pool #G12580 (3128MBCR6)	11,350	11,246	11,964			
15	FHLMC Gold 30-year Fixed Pool # G02581 5% 09/01/35 (3128M4FW8)	20,498	19,913	21,066			
16	FNMA - 5.000% - 03/15/2016 (31359MH89)	25,000	25,923	27,252			
17	FNMA 30-year Fixed Pool # 735897 5 5% 10/01/36 (31402RRS0)	17,959	17,841	18,862			
18	FNMA PL 254919 - 4.0000% - 09/01/2018 (31371LDY2)	11,886	11,725	12,218			
19	FNMA PL 545248 - 6 0000% - 08/01/2016 (31385HWH1)	8,215	8,480	8,773			
20	FNMA PL 648580 - 7.0000% - 07/01/2032 (31390KQ92)	10,819	11,371	11,925			
21	FNMA PL 725866 - 4 5000% - 09/01/2034 (31402DMP2)	15,816	15,243	15,888			
22	FNMA PL 735493 - 4.5000% - 04/01/2020 (31402RC64)	27,536	26,834	28,864			
23	FNMA PL 745506 - 5 6630% - 02/01/2016 (31403DGP8)	47,274	47,143	52,023			
24	FNMA PL 763798 - 5.5000% - 03/01/2034 (31404BRT1)	41,670	41,906	43,829			
25	UNITED STATES TREAS BDS 6 625% 02/15/2027 (912810EZ7)	10,000	12,958	12,497			
26	US T NOTES - 3.500% - 02/15/2018 (912828HR4)	45,000	46,065	44,641			
27	US T NTS - 4 500% - 05/15/2017 (912828GS3)	25,000	27,159	26,723			
28	US TREASURY BDS - 4.750% - 02/15/2037 (912810PT9)	45,000	48,854	46,041			

Form 990-PF, Part II, Line 10b - Investments: Corporate Stock

		TOTAL:		8,340,760		7,888,674	
	Description/Symbol/CUSIP Number	Shares	Line 10b - Column (b) Book Value	Line 10b - Column (c) Fair Market Value			
1	Amazon Com (AMZN)	515	36,499				69,277
2	AMERN AADV INTL EQ FD INTL CL (AAIEX)	19,295	417,371				305,249
3	APPLE INC. (AAPL)	365	37,192				76,916
4	ARTISAN SMALL CAP VALUE (ARTVX)	28,267	511,530				405,072
5	BE AEROSPACE, INC (BEAV)	1,500	30,129				35,250
6	BLACKROCK INC (BLK)	125	28,603				29,025
7	C H Robinson Worldwide Inc (CHRW)	550	31,425				32,302
8	CISCO SYSTEMS INC (CSCO)	2,000	47,589				47,880
9	CME GROUP, INC (CME)	205	82,693				68,872
10	COACH INC (COH)	850	29,801				31,051
11	DFA EMERGING MARKETS VALUE PORTFOLIO (DFEVX)	7,817	164,222				245,767
12	DFA INTERNATIONAL SMALL CO PORTFOLIO (DFISX)	21,232	337,409				302,127
13	DFA INTERNATIONAL VALUE PORTFOLIO (DFIVX)	18,370	324,090				313,216
14	DFA U.S. LARGE CAP VALUE PORTFOLIO (DFLVX)	47,080	746,624				803,186
15	DFA U.S. SMALL CAP VALUE PORTFOLIO (DFS VX)	15,824	445,221				310,620
16	Expeditors Intl Wash Inc (EXPD)	850	27,914				29,555
17	GILEAD SCIENCES INC (GILD)	700	33,014				30,289
18	Goldman Sachs Group (GS)	200	34,405				33,768
19	Google Inc C I A (GOOG)	110	49,763				68,198
20	GREEN MOUNTAIN COFFEE ROASTERS, INC (GMCR)	550	36,127				44,809
21	HARDING, LOEVNER FUNDS, INC. EMERGING MARKETS PORT (HLEMVX)	5,377	158,097				231,157
22	Honeywell International Inc. (HON)	750	29,079				29,400
23	ILLUMINA INC COM (ILMN)	875	33,902				26,845
24	INTERCNTL EXCHANGE (ICE)	350	32,931				39,305
25	INTUITIVE SURGICAL, INC (ISRG)	160	21,341				48,549
26	IRON MOUNTAIN NEW (IRM)	1,225	33,034				27,881
27	iShares Russell 2000 Growth Index (IWO)	6,422	506,577				437,146
28	MASTERCARD INC (MA)	150	35,542				38,397
29	MCAFEE INC (MFE)	600	24,807				24,342
30	MONSANTO CO (MON)	690	53,296				56,408
31	NATL OILWELL VARCO (NOV)	1,200	58,588				52,908
32	NEUTRAL TANDEM, INC (TNDM)	500	12,009				11,375
33	NUVASIVE, INC. (NUVA)	600	19,137				19,188
34	PIMCO EMERGING LOCAL BD FD INSTI CL (PELBX)	23,130	230,629				229,910
35	Pimco High-Yield Instl (PHIYX)	62,031	474,034				545,869
36	POTASH CORPORATION OF SASKATCHEWAN INC (POT)	375	42,346				40,688
37	PRECISION CASTPARTS (PCP)	325	34,004				35,864
38	PRICELINE.COM INCORPORATED (PCLN)	130	27,647				28,393
39	QUALCOMM INC (QCOM)	1,000	40,253				46,260
40	RESEARCH IN MOTION LTD NEW (RIMM)	500	29,939				33,770
41	Schlumberger LTD (SLB)	825	54,881				53,699
42	SOUTHWESTERN ENERGY (SWN)	950	39,880				45,790
43	St. Jude Med Inc (STJ)	1,000	35,509				36,780
44	STERICYCLE INC (SRCL)	700	38,663				38,619

Form 990-PF, Part II, Line 10b - Investments: Corporate Stock

TOTAL:				8,340,760	7,888,674
	Description/Symbol/CUSIP Number	Shares	Line 10b - Column (b) Book Value	Line 10b - Column (c) Fair Market Value	
45	Teva Pharmaceutical Sp Adr (TEVA)	1,150	61,609	64,607	
46	VANGUARD 500 IDX FD SIGNAL SHS (VIFSX)	16,161	1,556,536	1,370,613	
47	VANGUARD EXPLORER FD ADMIRAL SHS (VEXRX)	5,107	366,796	272,224	
48	VANGUARD INTL GROWTH FD ADMIRAL SHS (VMILX)	11,839	788,621	639,795	
49	VISA INC (V)	920	49,452	80,463	

Form 990-PF, Part II, Line 10c - Investments: Corporate Bonds

TOTAL:				Line 10c - Column (b) Book Value	Line 10c - Column (c) Fair Market Value
	Description/Symbol/CUSIP Number	Shares			
1	ABBOTT LABORATORIE - 5.875% - 05/15/2016 (002824AT7)	15,000		14,968	15,569,163
2	ACE INA HLDG INC SR NT 5 6% 05/15/2015 (00440EAL1)	15,000		15,391	16,544
3	AETNA INC NEW SR NT 7 875% 03/01/2011 MAKE WHOLE (00817YAB4)	40,000		43,214	16,096
4	AFLAC INC SR NT 8.50000% 05/15/2019 (001055AC6)	10,000		10,470	42,587
5	ALCOA INC 7 375% DUE 08/01/2010 (013817AB7)	30,000		33,641	11,550
6	AMER EXP - 5.5000% - 09/12/2016 (025816AW9)	10,000		10,019	31,083
7	AMER EXPRESS CRDT CO MTN SER C 07 30000% 08/20/13 (0258M0CY3)	10,000		10,026	10,296
8	ARCHER DANIELS - 7 5000% - 03/15/2027 (039483AM4)	10,000		12,608	11,050
9	AT&T CORP CR SENS 7 300% 11/15/2011 (001957BC2)	25,000		27,452	11,737
10	BANC OF AMER COMM SER 2005-6 CL A4 5.353% 09/10/47 (05947U4D7)	15,000		14,476	27,527
11	BANK OF AMERICA CRDT SER 2008-A9 CL A9 04 07000% 07 (05522RCG1)	25,000		24,786	14,647
12	BANK OF NEW YORK MELLON 5.450% DUE 05-15-19 (06406HBM0)	10,000		10,002	25,096
13	BB&T CORP - 5.2000% - 12/23/2015 (054937AE7)	20,000		19,138	10,490
14	BECTON DCKNSN - 7 000% - 08/01/2027 (075887AN9)	10,000		11,959	20,765
15	BERKSHIRE HATHAWAY FIN CORP SR NT 4 625% 10/15/201 (084664AD3)	5,000		4,826	11,846
16	BESTFOODS MTS - 6.6250% - 04/15/2028 (08658EAA5)	10,000		11,562	5,403
17	BOEING CO - 7 250% - 06/15/2025 (097023AM7)	10,000		12,597	11,052
18	BURLINGTON NORTN SANTA FE 6.150% 05/01/2037 (12189TAZ7)	5,000		4,810	11,393
19	CAMPBELL SOUP - 8 8750% - 05/01/2021 (134429AG4)	10,000		12,851	5,259
20	CATERPILLAR - 6 625% - 07/15/2028 (149123BF7)	10,000		11,712	12,000
21	CHARLES SCHWAB CORP NEW 4.95000% 06/01/2014 SR NT (808513AC9)	20,000		21,011	11,160
22	CHASE ISS TR SER 2005-A7 - 4 550% - 03/15/2013 (161571AQ7)	25,000		25,408	21,314
23	CHUBB - 6.6000% - 08/15/2018 (171232AD3)	15,000		16,698	25,812
24	COCA COLA ENTERPRISES INC 8 50000% 02/01/2022 DEB (191219AP9)	5,000		6,416	16,777
25	CSX - 6 3000% - 03/15/2012 (126408GB3)	15,000		15,855	6,418
26	DEVON ENERGY CORPORATION NOTE 06.30000% 01/15/2019 (25179MAH6)	10,000		10,094	16,229
27	DOVER - 6.6500% - 06/01/2028 (260003AC2)	10,000		11,846	11,135
28	DU PONT E I DE NEMOURS & CO 6.00000% 07/15/2018 SR (263534BT5)	10,000		10,105	11,233
29	Eaton Corp 5 600% Due 05-15-18 05/15/18 5 6% (278058DD1)	15,000		14,897	10,912
30	EMERSON ELECT - 5.0000% - 12/15/2014 (291011AS3)	20,000		19,172	15,723
31	EQUITABLE COS - 7 0000% - 04/01/2028 (29444GAJ6)	10,000		11,698	21,500
32	FED EXPRESS - 9.6500% - 06/15/2012 (313309AJ5)	15,000		18,844	9,050
33	FLORIDA POWER CORP 1MTG BD 5 80000% 09/15/2017 (341099CG2)	10,000		10,036	17,288
34	GE CAP CORP GLOB DTD 2/15/2002 5 875% 2/15/2012 (36962GXS8)	25,000		26,416	10,882
35	GOLDMAN SACHS GROUP INC BOND DTD 1/13/2004 5 15% 1/15/2014 (38143UAB)	15,000		14,968	26,640
36	GOLDMAN SACHS GRP INC MTN BE 6.00000% 05/01/2014 (38141EA33)	5,000		5,393	15,763
37	GREENWICH CAP - 4 533% - 01/05/2036 (396789ER6)	25,000		24,791	5,450
38	GREENWICH CAP COMM SER 2005-GG3 A2 4 305% 8/10/42 (396789JR1)	19,185		19,164	25,261
39	HALLIBURTON COMPANY NOTES 06.70000% 09/15/2038 (406216AW1)	5,000		4,997	19,159
40	HARTFORD FINL SVC GRP NT - 6.300% - 03/15/2018 (416515AU8)	5,000		3,960	5,648
41	HEINZ - 6.3750% - 07/15/2028 (423074AF0)	5,000		5,598	4,975
42	HERSHEY - 4.850% - 08/15/2015 (427866AM0)	15,000		14,439	5,101
43	Home Depot Inc 5 4% 03/01/16 (437076AP7)	10,000		9,996	15,957
44	INTERNATIONAL BUSINESS MACHINES BOND DTD 11/27/2002 4.75% 11/29/2012	20,000		20,053	10,347
					21,656

Form 990-PF, Part II, Line 10c - Investments: Corporate Bonds

		TOTAL:		Line 10c - Column (b)	Line 10c - Column (c)
		Shares	Book Value	Fair Market Value	
45	ISRAELI 3RD JUBILEE 10 YR BD - 5 000% - 06/01/2015 (ISRAELI01)	100,000	100,000	100,000	1,569,163
46	ISRAELI 3RD JUBILEE 10 YR BD - 5 650% - 07/01/2014 (ISRAELI04)	100,000	100,000	100,000	100,000
47	ISRAELI 4TH JUBILEE 10 YR BD - 4 850% - 12/01/2016 (ISRAELI03)	150,000	150,000	150,000	150,000
48	ISRAELI 4TH JUBILEE 5 YR BD - 4 700% - 12/01/2011 (ISRAELI02)	150,000	150,000	150,000	150,000
49	KRAFT FOODS INC NT 6 12500% 06/23/2018 (50075NAV6)	10,000	9,822	10,679	10,679
50	M & T Bank Corporation 5 375% Due 05-24-12 (55261FAA2)	25,000	23,481	25,985	25,985
51	MCDONALDS CORP NOTES 05 35000% 03/01/2018 (58013MEE0)	5,000	5,016	5,332	5,332
52	MELLON FDG - 5 0000% - 12/01/2014 (585515AD1)	10,000	10,012	10,654	10,654
53	MERRILL LYNCH CO INC MTN BE 6 40000% 08/28/2017 FR (59018YJ69)	5,000	5,051	5,235	5,235
54	MERRILL LYNCH CO INC MTN BE 6 87500% 04/25/2018 SR (59018YN64)	10,000	10,281	10,617	10,617
55	METLIFE - 5 0000% - 11/24/2013 (59156RAG3)	30,000	30,212	31,626	31,626
56	MORGAN STANLEY - 4 750% - 04/01/2014 (61748AAE6)	20,000	18,569	19,872	19,872
57	MORGAN STANLEY 6 625% 4/1/18 (6174466Q7)	5,000	5,457	5,426	5,426
58	NEW AMERICA HOLDINGS 8 500% DUE 02-23-25 (652478AX6)	5,000	4,798	5,890	5,890
59	Pfizer Inc 6 200% Due 03-15-19 (717081DB6)	15,000	15,000	16,560	16,560
60	PNC FDG CORP SUB NT 5 625% 02/01/2017 (693476BB8)	10,000	9,949	10,024	10,024
61	PNC FUNDING CORP SB NT 5 25000% 11/15/2015 (693476AT0)	10,000	10,363	10,366	10,366
62	PROGRESSIVE CORP OHIO SR NT 6 375% 01/15/2012 (743315AK9)	25,000	25,456	26,792	26,792
63	PRUDENTIAL FINL INC MTNS BOOK 6 100% 06/15/2017 FR (74432QAY1)	10,000	10,081	10,350	10,350
64	SARA LEE 6 25 DUE 9/15/11 (803111AK9)	15,000	15,843	15,996	15,996
65	ST PAUL COS - 8 1250% - 04/15/2010 (792860AD0)	25,000	28,506	25,481	25,481
66	U S BANCORP MTNS BK ENT 4 2% 05/15/2014 (91159HGR5)	10,000	10,516	10,431	10,431
67	UNITED PARCEL SERVC NOTE 06 20000% 01/15/2038 (911312AJ5)	5,000	5,164	5,631	5,631
68	US BANK TR NAT - 4 8000% - 04/15/2015 (90333WAC2)	15,000	14,382	15,714	15,714
69	VERIZON COMMUNICATIONS DTD 11/4/2008 8 75% 11/1/2018 (92343VAQ7)	15,000	15,937	19,005	19,005
70	VIRGINIA ELEC & PWR CO 8 87500% 11/15/2038NT B (927804FG4)	5,000	6,235	7,058	7,058
71	WACHOVIA BK - 4 748% - 02/15/2041 (929766NQ2)	45,000	43,011	44,272	44,272
72	WALT DISNEY CO NTS - 6 3750% - 03/01/2012 (25468PBX3)	15,000	16,254	16,425	16,425
73	WELLS FARGO - 5 1250% - 09/15/2016 (949746JE2)	15,000	14,136	15,281	15,281
74	WI ELEC PW - 4 5000% - 05/15/2013 (976656BX5)	20,000	19,599	20,651	20,651

Part II, Line 14 (990-PF) - Land, Buildings, and Equipment

		30,378	30,378	30,378	30,378	0	0	0
	Item or Category	Cost or Other Basis	Accumulated Depreciation Beg of Year	Accumulated Depreciation End of Year	Book Value Beg of Year	Book Value End of Year	FMV End of Year	
1	Furniture and Fixtures	30,378	30,378	30,378	0	0	0	
2								
3								
4								
5								
6								
7								
8								
9								
10								

Form 990-PF, Part II, Line 15 - Other Assets

		TOTAL:	150,000	150,000
	Asset Description	Line 15 - Column (b) Book Value	Line 15 - Column (c) Fair Market Value	150,000
1	PRI LOAN TO TZEDEC ECONOMIC DEVELOPMENT FUND	150,000	150,000	
2				
3				
4				
5				
6				
7				
8				
9				
10				

	0	0	0
TOTAL:	0	0	0

[illegible]

Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

CENTER FOR ADVANCEMENT OF JEWISH ED

☐ Person ☒ Business

Street

4200 BISCAYNE BLVD

City

MIAMI

State

FL

Zip code

33137

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Charitable Event

Amount

1,000

Name

CHICAGO ACADEMY OF SCIENCES

☐ Person ☒ Business

Street

2430 N CANON DR

City

CHICAGO

State

IL

Zip code

60614

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

General & Unrestricted

Amount

1,000

Name

CHICAGO YOUTH SYMPHONY ORCHESTRA

☐ Person ☒ Business

Street

410 S MICHIGAN AVE

City

CHICAGO

State

IL

Zip code

60605

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

General & Unrestricted

Amount

1,000

Name

CHILDRENS BEREAVEMENT CENTER INC

☐ Person ☒ Business

Street

7600 S RED RD STE 307

City

SOUTH MIAMI

State

FL

Zip code

33143

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

General & Unrestricted

Amount

1,000

Name

CHRISTOPHER COLUMBUS HIGH SCHOOL

☐ Person ☒ Business

Street

3000 SW 87TH AVE

City

MIAMI

State

FL

Zip code

33165

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

General & Unrestricted

Amount

2,500

Name

CLASSICAL SOUTH FLORIDA INC

☐ Person ☒ Business

Street

330 SW 2ND ST, STE 207

City

FORT LAUDERDALE

State

FL

Zip code

33312

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

General & Unrestricted

Amount

500

Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

COMMUNITY TELEVISION FOUNDATION OF S FLORIDA

☐ Person ☒ Business**Street**

14901 NE 20TH AVE

City	State	Zip code	Foreign Country
NORTH MIAMI	FL	33181	

Relationship	Foundation Status
N/A	509(a)(1)

Purpose of grant/contribution	Amount
Annual Donors of Distinction Gift Campaign	1,000

Name

CUBAN HEBREW CONGREGATION OF MIAMI INC

☐ Person ☒ Business**Street**

1700 MICHIGAN AVE

City	State	Zip code	Foreign Country
MIAMI BEACH	FL	33139	

Relationship	Foundation Status
N/A	509(a)(1)

Purpose of grant/contribution	Amount
Purim Carnival	1,000

Name

DMSTC OF SOUTH FLORIDA

☐ Person ☒ Business**Street**

12982 SW 89TH AVE

City	State	Zip code	Foreign Country
MIAMI	FL	33176	

Relationship	Foundation Status
N/A	509(a)(1)

Purpose of grant/contribution	Amount
General & Unrestricted	1,600

Name

DUKE UNIVERSITY

☐ Person ☒ Business**Street**

BOX 104132

City	State	Zip code	Foreign Country
DURHAM	NC	27708	

Relationship	Foundation Status
N/A	509(a)(1)

Purpose of grant/contribution	Amount
General & Unrestricted	5,000

Name

DUKE UNIVERSITY-RUTH K BROAD BIOMEDICAL RESEARCH FDN

☐ Person ☒ Business**Street**

512 S MANGUM ST

City	State	Zip code	Foreign Country
DURHAM	NC	27701	

Relationship	Foundation Status
N/A	509(a)(1)

Purpose of grant/contribution	Amount
Neurobiology and Disease Program	20,000

Name

DURHAM-CHAPEL HILL JEWISH FEDERATION

☐ Person ☒ Business**Street**

3622 LYCKAN PKWY

City	State	Zip code	Foreign Country
DURHAM	NC	27707	

Relationship	Foundation Status
N/A	509(a)(1)

Purpose of grant/contribution	Amount
Youth Activity Center and Teen Mitzvot Program	50,000

Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

FAIRCHILD TROPICAL BOTANIC GARDEN

☐ Person ☒ Business

Street

10901 OLD CUTLER RD

City

MIAMI

State

FL

Zip code

33156

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

General & Unrestricted

Amount

7,500

Name

FAIRCHILD TROPICAL BOTANIC GARDEN

☐ Person ☒ Business

Street

10901 OLD CUTLER RD

City

MIAMI

State

FL

Zip code

33156

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Fairchild Challenge

Amount

11,000

Name

FAMILY RESOURCE CENTER OF SOUTH FLORIDA INC

☐ Person ☒ Business

Street

155 S MIAMI AVE STE 400

City

MIAMI

State

FL

Zip code

33130

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Healthy Families Program

Amount

5,000

Name

FLORIDA IMMIGRANT ADVOCACY CENTER INC

☐ Person ☒ Business

Street

3000 BISCAYNE BLVD STE 400

City

MIAMI

State

FL

Zip code

33137

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Charitable Event

Amount

4,000

Name

FLORIDA INTERNATIONAL UNIVERSITY FOUNDATION INC

☐ Person ☒ Business

Street

CAMPUS MARC 530

City

MIAMI

State

FL

Zip code

33199

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

General & Unrestricted

Amount

5,000

Name

FLORIDA LIONS EYE BANK INC

☐ Person ☒ Business

Street

900 NW 17TH ST

City

MIAMI

State

FL

Zip code

33136

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Research Conducted by Dr Sander R Dubovy

Amount

2,500

Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

FLORIDA STATE UNIVERSITY

☐ Person ☒ Business**Street**

A2201 UNIVERSITY CENTER

City

TALLAHASSEE

State

FL

Zip code

32306

Foreign Country**Relationship**

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Scholarship Fund

Amount

2,000

Name

FOUNDATION FOR NEUROLOGIC DISEASES

☐ Person ☒ Business**Street**

10 STATE ST

City

NEWBURYPORT

State

MA

Zip code

01950

Foreign Country**Relationship**

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Alzheimer's Disease Program

Amount

1,000

Name

FREEMAN CENTER FOR JEWISH LIFE AT DUKE UNIVERSITY

☐ Person ☒ Business**Street**

1415 FARBER ST

City

DURHAM

State

NC

Zip code

27708

Foreign Country**Relationship**

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Annual Fund

Amount

500

Name

FRIENDS OF THE BASS MUSEUM INC

☐ Person ☒ Business**Street**

2121 PARK AVE

City

MIAMI BEACH

State

FL

Zip code

33139

Foreign Country**Relationship**

N/A

Foundation Status

509(a)(2)

Purpose of grant/contribution

Educational Art Appreciation Programming

Amount

1,000

Name

FRIENDS OF WLRN INC

☐ Person ☒ Business**Street**

169 E FLAGLER ST STE 1400

City

MIAMI

State

FL

Zip code

33131

Foreign Country**Relationship**

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

General & Unrestricted

Amount

500

Name

GABLESTAGE INC

☐ Person ☒ Business**Street**

1200 ANASTESIA RD 230

City

CORAL GABLES

State

FL

Zip code

33134

Foreign Country**Relationship**

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Educational Programming

Amount

500

Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

GAINESVILLE HILLEL INC

☐ Person ☒ Business**Street**

2020 W UNIVERSITY AVE

City

GAINESVILLE

State

FL

Zip code

32603

Foreign Country**Relationship**

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

LEAD Program

Amount

5,000

Name

GRACE FOUNDATION OF NEW YORK

☐ Person ☒ Business**Street**

264 WATCHOGUE RD

City

STATEN ISLAND

State

NY

Zip code

10314

Foreign Country**Relationship**

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

General & Unrestricted

Amount

1,000

Name

GREATER MIAMI JEWISH FEDERATION

☐ Person ☒ Business**Street**

4200 BISCAYNE BLVD FL 2

City

MIAMI

State

FL

Zip code

33137

Foreign Country**Relationship**

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

General & Unrestricted

Amount

9,000

Name

GREATER MIAMI JEWISH FEDERATION

☐ Person ☒ Business**Street**

4200 BISCAYNE BLVD FL 2

City

MIAMI

State

FL

Zip code

33137

Foreign Country**Relationship**

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Morris N Broad Philanthropic Fund

Amount

355,422

Name

GREATER MIAMI JEWISH FEDERATION

☐ Person ☒ Business**Street**

4200 BISCAYNE BLVD FL 2

City

MIAMI

State

FL

Zip code

33137

Foreign Country**Relationship**

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

2009 Regular Campaign

Amount

50,000

Name

GREATER MIAMI TENNIS & EDUCATION FOUNDATION INC

☐ Person ☒ Business**Street**

7320 CRANDON BLVD

City

KEY BISCAYNE

State

FL

Zip code

33149

Foreign Country**Relationship**

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

General & Unrestricted

Amount

1,000

Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

HAIFA FOUNDATION NORTH AMERICA INC

☐ Person ☒ Business

Street

1065 AVENUE OF THE AMERICAS

City

NEW YORK

State

NY

Zip code

10018

Foreign Country

Relationship

N/A

Foundation Status

PF

Purpose of grant/contribution

Preschool Program

Amount

29,160

Name

HEARING RESEARCH INSTITUTE INC

☐ Person ☒ Business

Street

7000 SW 62ND AVE, STE #210

City

SOUTH MIAMI

State

FL

Zip code

33143

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

General & Unrestricted

Amount

12,500

Name

HEARING RESEARCH INSTITUTE INC

☐ Person ☒ Business

Street

7000 SW 62ND AVE, STE #210

City

SOUTH MIAMI

State

FL

Zip code

33143

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Hearing Screening at Ruth K Broad Bay Harbor School Program

Amount

5,000

Name

HILLEL THE FOUNDATION FOR JEWISH CAMPUS LIFE

☐ Person ☒ Business

Street

574 HILGARD AVE

City

LOS ANGELES

State

CA

Zip code

90024

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

General & Unrestricted

Amount

5,000

Name

ISLAND DOLPHIN CARE INC

☐ Person ☒ Business

Street

150 LORELANE PL

City

KEY LARGO

State

FL

Zip code

33037

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

General & Unrestricted

Amount

500

Name

ISLAND DOLPHIN CARE INC

☐ Person ☒ Business

Street

150 LORELANE PL

City

KEY LARGO

State

FL

Zip code

33037

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Educational Scholarships/Endowment Funds

Amount

12,000

Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

JAFCO CHILDRENS FOUNDATION INC

☐ Person ☒ Business

Street

4200 N UNIVERSITY DR

City

SUNRISE

State

FL

Zip code

33351

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

2009/2010 Summer Camp Operations and Scholarship Funds

Amount

1,000

Name

JEWISH COMMUNAL FUND

☐ Person ☒ Business

Street

575 MADISON AVE STE 703

City

NEW YORK

State

NY

Zip code

10022

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

General & Unrestricted

Amount

5,000

Name

JEWISH MUSEUM OF FLORIDA INC

☐ Person ☒ Business

Street

301 WASHINGTON AVE

City

MIAMI BEACH

State

FL

Zip code

33139

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Educational Programming with Miami-Dade County Public Schools

Amount

1,800

Name

JOE DIMAGGIO CHILDRENS HOSPITAL FOUNDATION INC

☐ Person ☒ Business

Street

3711 GARFIELD ST

City

HOLLYWOOD

State

FL

Zip code

33021

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Purchase of Equipment Fund

Amount

1,000

Name

KIDS DREAMS INC A PRIVATE FOUNDATION

☐ Person ☒ Business

Street

PO BOX 3947

City

WEST PALM BCH

State

FL

Zip code

33402

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Scholarship Programs

Amount

1,800

Name

LEO BAECK EDUCATION CENTER FOUNDATION

☐ Person ☒ Business

Street

3555 TIMMONS LN STE 1440

City

HOUSTON

State

TX

Zip code

77027

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Community Center Initiatives Program

Amount

25,000

Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

LIBERATION IN NORTH KOREA

☐ Person ☒ Business

Street

1751 TORRANCE BLVD STE L

City

TORRANCE

State

CA

Zip code

90501

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

General & Unrestricted

Amount

500

Name

LOOMIS INSTITUTE

☐ Person ☒ Business

Street

BATCHELDER RD

City

WINDSOR

State

CT

Zip code

06095

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

General & Unrestricted

Amount

8,000

Name

LOOMIS INSTITUTE

☐ Person ☒ Business

Street

BATCHELDER RD

City

WINDSOR

State

CT

Zip code

06095

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Irving Bussel Scholarship Fund

Amount

30,000

Name

MIAMI BEACH SENIOR HIGH SCHOOL

☐ Person ☒ Business

Street

2231 PRAIRIE AVE

City

MIAMI BEACH

State

FL

Zip code

33139

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

A M E S Project

Amount

13,000

Name

MIAMI CHILDRENS MUSEUM INC

☐ Person ☒ Business

Street

980 MACARTHUR CSWY

City

MIAMI

State

FL

Zip code

33132

Foreign Country

Relationship

N/A

Foundation Status

509(a)(2)

Purpose of grant/contribution

General & Unrestricted

Amount

5,000

Name

MIAMI JEWISH HOME AND HOSPITAL FOR THE AGED INC

☐ Person ☒ Business

Street

5200 NE 2ND AVE

City

MIAMI

State

FL

Zip code

33137

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

General & Unrestricted

Amount

1,000

Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

MIAMI SHORES PRESBYTERIAN CHURCH

☐ Person ☒ Business

Street

602 NE 96TH ST

City

MIAMI SHORES

State

FL

Zip code

33138

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Haitian Relief Program

Amount

2,000

Name

MISSISSIPPI CENTER FOR JUSTICE

☐ Person ☒ Business

Street

POST OFC BOX 1023

City

JACKSON

State

MS

Zip code

39215

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

General & Unrestricted

Amount

1,500

Name

MOTHERS VOICES OF SOUTH FLORIDA

☐ Person ☒ Business

Street

150 W FLAGLER ST

City

MIAMI

State

FL

Zip code

33130

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

General & Unrestricted

Amount

500

Name

MOUNT SINAI MEDICAL CENTER FOUNDATION INC

☐ Person ☒ Business

Street

4300 ALTON RD

City

MIAMI BEACH

State

FL

Zip code

33140

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

General & Unrestricted

Amount

12,300

Name

MOUNT SINAI MEDICAL CENTER FOUNDATION INC

☐ Person ☒ Business

Street

4300 ALTON RD

City

MIAMI BEACH

State

FL

Zip code

33140

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Wein Center Emerald Butterfly Society Div

Amount

1,000

Name

MUSEUM OF SCIENCE INC

☐ Person ☒ Business

Street

3280 S MIAMI AVE

City

MIAMI

State

FL

Zip code

33129

Foreign Country

Relationship

N/A

Foundation Status

509(a)(2)

Purpose of grant/contribution

Education/Work Program

Amount

2,500

Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

NATIONAL COUNCIL OF JEWISH WOMEN INC

☐ Person ☒ Business**Street**

4144 CHASE AVE

City

MIAMI BEACH

State

FL

Zip code

33140

Foreign Country**Relationship**

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Various projects of NCJW

Amount

1,000

Name

NEW ISRAEL FUND

☐ Person ☒ Business**Street**

1101 14TH ST NW STE 600

City

WASHINGTON

State

DC

Zip code

20005

Foreign Country**Relationship**

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Gerald Cromer Fund

Amount

22,000

Name

NEW WORLD SYMPHONY INC

☐ Person ☒ Business**Street**

541 LINCOLN RD 3RD FL

City

MIAMI BEACH

State

FL

Zip code

33139

Foreign Country**Relationship**

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

MusicLab Pilot Program/Concert Recitals

Amount

10,000

Name

NEW YORK LAW SCHOOL

☐ Person ☒ Business**Street**

57 WORTH ST

City

NEW YORK

State

NY

Zip code

10013

Foreign Country**Relationship**

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Scholarship Fund

Amount

50,000

Name

O'CONNOR HOUSE, LLC

☐ Person ☒ Business**Street**

30 N 3RD AVE

City

PHOENIX

State

AZ

Zip code

85003

Foreign Country**Relationship**

N/A

Foundation Status

509(a)(2)

Purpose of grant/contribution

General & Unrestricted

Amount

3,000

Name

OAKWOOD SCHOOL

☐ Person ☒ Business**Street**

11600 MAGNOLIA BLVD

City

N HOLLYWOOD

State

CA

Zip code

91601

Foreign Country**Relationship**

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Building Playspace Fund

Amount

3,500

Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

OAKWOOD SCHOOL

☐ Person ☒ Business

Street

11600 MAGNOLIA BLVD

City

N HOLLYWOOD

State

CA

Zip code

91601

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Scholarship Fund

Amount

7,500

Name

OUR ELDER BROTHERS AND SISTERS FDN

☐ Person ☒ Business

Street

1177 KANE CONCOURSE STE 112

City

BAR HARBOR ISLANDS

State

FL

Zip code

33154

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Booklets Project

Amount

1,000

Name

OUTSIDE IN PRODUCTIONS

☐ Person ☒ Business

Street

PO BOX 5714

City

SANTA FE

State

NM

Zip code

87502

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

General & Unrestricted

Amount

2,000

Name

PELICAN HARBOR SEABIRD STATION INC

☐ Person ☒ Business

Street

1279 NE 79 ST CAUSEWAY

City

MIAMI

State

FL

Zip code

33138

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Charitable Event

Amount

1,000

Name

PLANNED PARENTHOOD OF S FL & THE TREASURE COAST

☐ Person ☒ Business

Street

2300 N FLORIDA MANGO RD

City

WEST PALM BCH

State

FL

Zip code

33409

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

General & Unrestricted

Amount

1,000

Name

PLAYGROUND THEATRE INC

☐ Person ☒ Business

Street

9806 NE 2ND AVE

City

MIAMI SHORES

State

FL

Zip code

33138

Foreign Country

Relationship

N/A

Foundation Status

509(a)(2)

Purpose of grant/contribution

Summer Camps Scholarships

Amount

1,000

Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

PORTSMOUTH HIGH SCHOOL

☐ Person ☒ Business**Street**

50 ANDREW JARVIS DR

City

PORTSMOUTH

State

NH

Zip code

03801

Foreign Country**Relationship**

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Lillian D. Goldin Scholarship Fund

Amount

500

Name

PTA FLORIDA CONGRESS

☐ Person ☒ Business**Street**

1050 4TH ST

City

MIAMI BCH

State

FL

Zip code

33139

Foreign Country**Relationship**

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

South Pointe Elementary School PTA Fund

Amount

5,000

Name

RANSOM EVERGLADES SCHOOL INC

☐ Person ☒ Business**Street**

3575 MAIN HWY

City

COCONUT GROVE

State

FL

Zip code

33133

Foreign Country**Relationship**

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

General & Unrestricted

Amount

4,000

Name

RANSOM EVERGLADES SCHOOL INC

☐ Person ☒ Business**Street**

3575 MAIN HWY

City

COCONUT GROVE

State

FL

Zip code

33133

Foreign Country**Relationship**

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Endowed Alumni Scholarship Fund

Amount

5,000

Name

RETURN TO FREEDOM INC

☐ Person ☒ Business**Street**

PO BOX 926

City

LOMPOC

State

CA

Zip code

93438

Foreign Country**Relationship**

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

General & Unrestricted

Amount

250

Name

RUTLAND HOSPITAL INC

☐ Person ☒ Business**Street**

160 ALLEN ST

City

RUTLAND

State

VT

Zip code

05701

Foreign Country**Relationship**

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Department of Oncology

Amount

5,000

Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

SABRINA COHEN FOUNDATION FOR STEM CELL RESEARCH INC

☐ Person ☒ Business**Street**

1800 SUNSET HARBOUR DR NO 2406

City

MIAMI BEACH

State

FL

Zip code

33139

Foreign Country**Relationship**

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

General & Unrestricted

Amount

5,000

Name

SCHOOL BOARD OF MIAMI-DADE COUNTY

☐ Person ☒ Business**Street**

1155 93RD ST

City

BAY HARBOR ISLANDS

State

FL

Zip code

33154

Foreign Country**Relationship**

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

After-school Tutorial Program

Amount

20,000

Name

SHANTI PROJECT INC

☐ Person ☒ Business**Street**

730 POLK ST

City

SAN FRANCISCO

State

CA

Zip code

94109

Foreign Country**Relationship**

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

General & Unrestricted

Amount

1,000

Name

SLATE VALLEY MUSEUM FOUNDATION

☐ Person ☒ Business**Street**

17 WATER ST

City

GRANVILLE

State

NY

Zip code

12832

Foreign Country**Relationship**

N/A

Foundation Status

509(a)(3)

Purpose of grant/contribution

General & Unrestricted

Amount

10,000

Name

SOUTH MIAMI HOSPITAL INC

☐ Person ☒ Business**Street**

6200 SW 73 ST

City

MIAMI

State

FL

Zip code

33143

Foreign Country**Relationship**

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

General & Unrestricted

Amount

5,000

Name

SOUTHERN SCHOLARSHIP FOUNDATION INC

☐ Person ☒ Business**Street**

322 STADIUM DR

City

TALLAHASSEE

State

FL

Zip code

32304

Foreign Country**Relationship**

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Housing Scholarship Fund

Amount

3,000

Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

STANFORD LAW SCHOOL

☐ Person ☒ Business**Street**

CROWN QUADRANGLE 559 NATHAN ABBOTT WAY

City	State	Zip code	Foreign Country
STANFORD	CA	94305	

Relationship	Foundation Status
N/A	509(a)(1)

Purpose of grant/contribution	Amount
Dean's Fund	3,000

Name

SUFFIELD ACADEMY

☐ Person ☒ Business**Street**

PO BOX 999

City	State	Zip code	Foreign Country
SUFFIELD	CT	06078	

Relationship	Foundation Status
N/A	509(a)(1)

Purpose of grant/contribution	Amount
General & Unrestricted	5,000

Name

TEMPLE BETH SHOLOM

☐ Person ☒ Business**Street**

4144 CHASE AVE

City	State	Zip code	Foreign Country
MIAMI BEACH	FL	33140	

Relationship	Foundation Status
N/A	509(a)(1)

Purpose of grant/contribution	Amount
General & Unrestricted	10,000

Name

TEMPLE BETH SHOLOM

☐ Person ☒ Business**Street**

4144 CHASE AVE

City	State	Zip code	Foreign Country
MIAMI BEACH	FL	33140	

Relationship	Foundation Status
N/A	509(a)(1)

Purpose of grant/contribution	Amount
Mitzvah Fund for ICCI	1,800

Name

TEMPLE BETH SHOLOM

☐ Person ☒ Business**Street**

4144 CHASE AVE

City	State	Zip code	Foreign Country
MIAMI BEACH	FL	33140	

Relationship	Foundation Status
N/A	509(a)(1)

Purpose of grant/contribution	Amount
Prenatal Seminar Program	6,000

Name

TEMPLE ISRAEL OF GREATER MIAMI

☐ Person ☒ Business**Street**

137 NE 19TH ST

City	State	Zip code	Foreign Country
MIAMI	FL	33132	

Relationship	Foundation Status
N/A	509(a)(1)

Purpose of grant/contribution	Amount
Community Garden	1,000

Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

TEMPLE ISRAEL OF HOLLYWOOD

☐ Person ☒ Business

Street

7300 HOLLYWOOD BLVD

City

LOS ANGELES

State

CA

Zip code

90046

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

General & Unrestricted

Amount

5,000

Name

THE AMERICAN FRIENDS OF BEIT ISSIE SHAPIRO INC

☐ Person ☒ Business

Street

18900 NE 25TH AVE

City

NORTH MIAMI BEACH

State

FL

Zip code

33180

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

General & Unrestricted

Amount

1,000

Name

THE AMERICAN FRIENDS OF BEIT ISSIE SHAPIRO INC

☐ Person ☒ Business

Street

18900 NE 25TH AVE

City

NORTH MIAMI BEACH

State

FL

Zip code

33180

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Training of Integration Aides

Amount

15,000

Name

THE INSTITUTE FOR THE ADVACEMENT OF ED IN JAFFA INC

☐ Person ☒ Business

Street

171-06 76TH AVE

City

FLUSHING

State

NY

Zip code

11366

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Na'amna Shrihan Scholarship Fund

Amount

2,000

Name

THE JEWISH COMMUNITY DAY SCHOOL OF DURHAM CHAPEL HILL

☐ Person ☒ Business

Street

1935 W CORNWALLIS RD

City

DURHAM

State

NC

Zip code

27705

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

General & Unrestricted

Amount

2,200

Name

THE MIAMI LIGHTHOUSE FOR THE BLIND AND VISUALLY IMPAIRED

☐ Person ☒ Business

Street

601 SW 8TH AVE

City

MIAMI

State

FL

Zip code

33130

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Student Eye Exams

Amount

5,000

Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

THE MIAMI LIGHTHOUSE FOR THE BLIND AND VISUALLY IMPAIRED

☐ Person ☒ Business

Street

601 SW 8TH AVE

City

MIAMI

State

FL

Zip code

33130

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Student Eye Exams

Amount

5,000

Name

THE MIAMI LIGHTHOUSE FOR THE BLIND AND VISUALLY IMPAIRED

☐ Person ☒ Business

Street

601 SW 8TH AVE

City

MIAMI

State

FL

Zip code

33130

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Student Eye Exams

Amount

5,000

Name

TIGERTAIL PRODUCTIONS INC

☐ Person ☒ Business

Street

842 NW 9TH CT

City

MIAMI

State

FL

Zip code

33136

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Educational Programming

Amount

500

Name

TOWN OF BAY HARBOR ISLANDS

☐ Person ☒ Business

Street

9665 BAY HARBOR TERRACE

City

BAY HARBOR ISLANDS

State

FL

Zip code

33154

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

General & Unrestricted

Amount

20,000

Name

TOWN OF BAY HARBOR ISLANDS

☐ Person ☒ Business

Street

9665 BAY HARBOR TERRACE

City

BAY HARBOR ISLANDS

State

FL

Zip code

33154

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Annual Community Celebration Project

Amount

10,000

Name

UNION LEAGUE BOYS AND GIRLS CLUB

☐ Person ☒ Business

Street

65 W JACKSON BLVD

City

CHICAGO

State

IL

Zip code

60604

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

General & Unrestricted

Amount

1,000

Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

UNITED STATES FUND FOR UNICEF

☐ Person ☒ Business

Street

125 MAIDEN LN

City

NEW YORK

State

NY

Zip code

10038

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

TAP Project 2009

Amount

250

Name

UNIVERSITY OF FLORIDA FOUNDATION INC

☐ Person ☒ Business

Street

PO BOX 14425

City

GAINESVILLE

State

FL

Zip code

32604

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Building Construction Fund of the Biomedical Engineering Sciences Division

Amount

50,000

Name

UNIVERSITY OF FLORIDA FOUNDATION INC

☐ Person ☒ Business

Street

PO BOX 14425

City

GAINESVILLE

State

FL

Zip code

32604

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Olive's Way College of Veterinary Medicine

Amount

5,000

Name

UNIVERSITY OF MIAMI

☐ Person ☒ Business

Street

ADVANCEMENT OFC

City

CORAL GABLES

State

FL

Zip code

33124

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Michael S. Gordon Center for Research and Education

Amount

25,000

Name

UNIVERSITY OF NC - CENTER FOR PUBLIC TELEVISION

☐ Person ☒ Business

Street

10 TW ALEXANDER DR, PO BOX 14900

City

DURHAM

State

NC

Zip code

27709

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

General & Unrestricted

Amount

200

Name

VALLECITOS MOUNTAIN REFUGE

☐ Person ☒ Business

Street

PO BOX 3160

City

TAOS

State

NM

Zip code

87571

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

General & Unrestricted

Amount

500

Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

WECARE OF SOUTH DADE INC

☐ Person ☒ Business

Street

1515 N REDLAND RD

City

FLORIDA CITY

State

FL

Zip code

33034

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Sexual Assault Community Education Project

Amount

5,000

Name

WELLNESS COMMUNITY-GREATER MIAMI INC

☐ Person ☒ Business

Street

8609 S DIXIE HWY

City

MIAMI

State

FL

Zip code

33143

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Support Groups in Underprivileged Areas of Miami-Dade County

Amount

1,800

Name

WOMEN IN DISTRESS OF BROWARD COUNTY INC

☐ Person ☒ Business

Street

1153 S ANDREWS AVE

City

FT LAUDERDALE

State

FL

Zip code

33316

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Hal Herman Children's Fund

Amount

1,000

Name

WOMENS EMERGENCY NETWORK INC

☐ Person ☒ Business

Street

1234 S DIXIE HWY STE 312

City

CORAL GABLES

State

FL

Zip code

33146

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

General & Unrestricted

Amount

500

Name

WOMENS FUND OF DADE COUNTY INC

☐ Person ☒ Business

Street

2650 SW 27TH AVE

City

MIAMI

State

FL

Zip code

33133

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Transition Fund

Amount

5,000

Name

WWP INC

☐ Person ☒ Business

Street

7020 A C SKINNER PKWY STE 100

City

JACKSONVILLE

State

FL

Zip code

32256

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

General & Unrestricted

Amount

500

Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name

YALE UNIVERSITY ALUMNI FUND

☐ Person ☒ Business

Street

P O BOX 1890

City

NEW HAVEN

State

CT

Zip code

06508

Foreign Country

Relationship

N/A

Foundation Status

509(a)(1)

Purpose of grant/contribution

Class of 1970 Reunion Gift for Financial Aid Support

Amount

3,000

Name

ZOOLOGICAL SOCIETY OF FLORIDA

☐ Person ☒ Business

Street

12400 SW 152ND ST

City

MIAMI

State

FL

Zip code

33177

Foreign Country

Relationship

N/A

Foundation Status

509(a)(2)

Purpose of grant/contribution

"Broad"ening Horizons Program

Amount

1,500

Name

☐ Person ☐ Business

Street

City

State

Zip code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

0

Name

☐ Person ☐ Business

Street

City

State

Zip code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

0

Name

☐ Person ☐ Business

Street

City

State

Zip code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

0

Name

☐ Person ☐ Business

Street

City

State

Zip code

Foreign Country

Relationship

Foundation Status

Purpose of grant/contribution

Amount

0