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## Form **990-PF**

Return of Private Foundation or Section 4947(a)(1) Nonexempt Charitable Trust Treated as a Private Foundation

OMB No. 1545-0052

2012

Department of the Treasury Internal Revenue Service

Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements For calendar year 2012, or tax year beginning , 2012, and ending

GOTTLIEB-SCHWARTZ FAMILY FOUNDATION						В	Employer identification nu 13-3794021 Telephone number (see the			
			•					С	If exemption application is	pending, check here
G	Che	eck al	II that apply:	Initial return Final return Address char	oge.	Initial return of a form Amended return Name change	ner public charit	<del></del>	1 Foreign organizations, che 2 Foreign organizations mee	ck here
Ĥ	Ć	heck	type of organiza			1(c)(3) exempt private f	oundation		here and attach computation	on .
				nonexempt char			orivate foundation		If private foundation status under section 507(b)(1)(A)	
1			ket value of all asse art II, column (c), Im		J Acc	counting method: X C Other (specify)	ash Accru	ıaı     F		·· L_
	▶ \$			,807.	(Part I	column (d) must be or	ī cash bāsīs )	·  r	If the foundation is in a 60 under section 507(b)(1)(B	
Pa	art i	E: co sa	olumns (b), (c), a arily equal the ar ee instructions)	e total of amount and (d) may not mounts in columi )	neces- n (a)	(a) Revenue and expenses per books	(b) Net invest		(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
		1		, grants, etc, received		170,000.				
		3		foundn is <b>not</b> req to a rings and tempor nts .		<u></u>				
		4	Dividends and inte	rest from securities		238.		238.	238.	
			Net rental income							
R E V E N U	<u> </u>			sale of assets not or	line 10	-10,489.				
	<u>.</u>		Gross sales price for assets on line 6a	5/,	348.			CEI!	78-24	, , , , , , , , , , , , , , , , , , , ,
		7 8	Capital gain net inc Net short-term	ome (from Part IV, lir capital gain	e 2)				0.	
Ĺ		9	Income modific	cations				····	100	,
_		IV a	Gross sales less returns and allowances				B MAY	14	रणा । प्र	
		b	Less Cost of goods sold				00	****		
		11	: Gross profit/(loss)	(att sch) (attach schedule)				JE IV	UI	
		''		See Stateme		30.	1			
		12	Total. Add lines	s 1 through 11		159,779.		238.	238.	
		13 14	Compensation of of Other employee sala	ficers, directors, trusti aries and wages	es, etc	0.	<del></del>			<del>}</del>
<b>a</b>		15	· •	employee benef	its					
5	A		Legal fees (attach s				-			
્ર ક	M		Accounting fees (at Other prof fees (att		,					
	N I S	17	Interest	,						
OPERAT	Ť R	18 19	Taxes (attach schedule)(s Depreciation (a							
	A		sch) and deplet	tion						
Ņ	Ě	20 21	Occupancy Travel, conferen	nces, and meeti	ngs					
A N D	E		Printing and pu							
D	P	23	Other expenses	s (attach schedui	e)					
	EXPERSE	24	Total operating	and administrat	ive					
	S	25	contributions, gifts,	lines 13 through, grants paid Part	ZZ XV	194,670.	······································			194,670.
				and disbursement				0.		
	$\dashv$	27	Subtract line 26	from line 12:		194,670.	······	υ.	0.	194,670.
		а	Excess of rever	nue over expens ents	es	-34,891.			,	
		b		me (if negative, enter	-0-)	34,031.		238.		
DAA				e (if negative, enter -0		uctions		TCC	238.	Form 990-PF (2012)

Part	Forn	n <b>990</b> .	PF (2012) GOTTLIEB-SCHWARTZ FAMILY FOUNDATI	ON	13-37	94021 Page 2
Cash - non-intrest-bearing			Attached school descend and any state of the descendant			
2 Savings and temporary cash investments 3 Accounts receivable Less: allowance for doubtful accounts - 4 Pledges receivable Less: allowance for doubtful accounts - 5 Grants receivable 1 Eess: allowance for doubtful accounts - 5 Grants receivable 6 Reveable displants for doubtful accounts - 7 Other rotes and loss receivable (clarbs shr) - 1 Less: allowance for doubtful accounts - 8 Inventroes for sale or translated (clarbs shr) - 1 Less: allowance for doubtful accounts - 8 Inventroes for sale or translated (clarbs shr) - 1 Less: allowance for doubtful accounts - 9 Propaid expenses and deferred clarb shr) - 1 Less: allowance for doubtful accounts - 8 Inventroes for sale or translated spenses and steep overment obligations (attach schedule) 2 Investments - Oppoids text (clarbs schedule) 2 Investments - Oppoids text (clarbs schedule) 3 Investments - Grants and steep overment obligations (attach schedule) 4 Less: accountabled depression (attach schedule) 5 Other assets (clarbs schedule) 5 Other assets (clarbs schedule) 6 Total assets (concribe - 1 Total research (spenses) 6 Total research (spenses) 7 Total Investments - Grants payable and accounted expenses. 8 Total liabilities (clarbs rise fuel) 8 Total Inselt (searche - 8 Total liabilities (clarbs rise fuel) 8 Total research (spenses) 9 Total related from afficer, discretis, frustee, & other disqualified persons. 9 Total related seringes, scenarios (spenses) 1 Total related from proper in schedule) 1 Total related from the complete complete (spenses) 1 Total relates and related in size scenarios (spenses) 1 Total relates and related in size scenarios (spenses) 1 Total relates and related in size (clarm) 1 Total control policy of the clares of the fuel spenses (spenses) 1 Total relates certificated from proper's related in size of the fuel spenses (spenses) 2 Total relations that do not follow SFAS 117, check here and complete lines 27 through 31. 2 Total liabilities (clares rise fuel) 2 Settlement of rise states from the fuel spenses (spenses) 3 Total relates and	T a		(See instructions )	(a) Book Value	(b) Book Value	(c) Fair Market Value
3 Accounts receivable Less: allowance for doubth accounts = 4 Pledges receivable Less: allowance for doubth accounts = 5 Grants receivable. 6 Receivables due from offices, descrots, justess, and other disparation deposited person (affaths knowled) (zee instructions) 7 Other rotes and loss receivable (affath showled) Less: allowance for doubth accounts = 5 Prepare disparations catachs showled (affath showled) Less: allowance for showled accounts = 5 Prepare disparations catachs showled (affath showled) b investments = U.S. and state government obligations (affaths showled) b investments = operate back (affath showled) b investments = coverate back (affath showled) c investments = coverate back (affath showled) 12 Investments = nortingage loans 13 Investments = operate back (affath showled) 12 Investments = mortingage loans 13 Investments = mortingage loans 14 Land, buildings, and equipment basis = Less excumulated depreciation (affaths showled) 15 Other seasets depreciation (affaths showled) 16 Other seasets depreciation (affaths showled) 17 Accounts payable and accrued expenses 18 Grants payable in an accrued expenses 19 Deferred revenue 20 Leans from infers, frecture, investes, & other disqualified persons. 21 Notal liabilities (add lines 17 through 22) 22 Total liabilities (closerative = and compilete inse 24 through 25 end lines 30 and 31. 23 Total liabilities (add lines 17 through 32. 24 Uncertainty and compilete inse 24 through 35 end lines 30 and 31. 25 Total liabilities (add lines 17 through 32. 26 Permanently restricted 27 Represently restricted 28 Permanently restricted 39 Total net assets or fund balances (see instructions) 30 Total net assets or fund balances (see instructions) 30 Total net assets or fund balances (see instructions) 31 Content cases or fund balances (see instructions) 32 Total net assets or fund balances (see instructions) 33 Total net assets or fund balances (see instructions) 34 Add lines 1, 2, and 3 4 Add lines 1, 2, and 3 5 Content cases or fund balances (closure) 4 Add lines 1,		1	Cash non-interest-bearing .			<del>,</del>
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equipment; basis   Lest accumulated deprecation (attach schedule)   12   Investments - mortgage loans   143,221.   37,497.   36,361.   14   Land, buildings, and equipment; basis   Lest accumulated deprecation (attach schedule)   15   Other assets (describe   16   Total assets (describe   16   Total assets (describe   17   Accounts payable and accrued expenses   16   Total assets (describe   17   Accounts payable and accrued expenses   18   Grants payable and accrued expenses   18   Grants payable   19   Deferred revenue   10   Land from from fromes, directors, frustees, & other disqualified persons   18   Constitution   19   Constitution		•	c Investments — corporate bonds (attach schedule) Statement 2	15,000.	15,000.	11,238.
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13 Investments – other (attach schedule) 14 Land, buildings, and equipment: basis + Less accumulated depretation (attach schedule) 15 Other assets (describe – ) 16 Total assets (to be completed by all filers – ) 17 Accounts payable and accrued expenses. 18 Grants payable   Deferred revenue   Defer			(attach schedule)			
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(attach schedule)  Other assets (describe		14				
See the instructions Also, see page   , item  )   166,546.   126,705.   121,807.		İ	(attach schedule)		·	
17   Accounts payable and accrued expenses   18   Grants payable   19   Deferred revenue   20   Loans from officers, directors, trustess, & other disqualified persons   1   21   Mortgages and other notes payable (attach schedule)   22   Other liabilities (add lines 17 through 22)   0   0   0   0   0		1	Total assets (to be completed by all filers -	166 546	126 705	121 807
18   Grants payable   19   Deferred reverue   20   Loans from officers, directors, frustees, & other disqualified persons   21   Mortgages and other notes payable (attach schedule)   22   Other liabilities (add lines 17 through 22)   0   0   0   0	L	17		100,340.	120,703.	121,007.
19   Deferred revenue   20   Loans from officers, directors, trustees, & other disqualified persons   21   Mortgages and other notes payable (attach schedule)   22   Other liabilities (describe	Ĩ	l .	· · · · · · · · · · · · · · · · · · ·			
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21 Mortgages and other notes payable (attach schedule)   22 Other liabilities (describe	1	1	<u> </u>			
Total liabilities and net assets or fund balances (see instructions)  Total liabilities and net assets frund balances (see instructions)  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)  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)  C Enter amount from Part I, line 27a.  3 Other inabilities (add lines 17 through 22)  O C Other liabilities (add lines 17 through 22)  O C Other liabilities (add lines 17 through 22)  O C Other liabilities (add lines 17 through 26 and lines 30 and 31.  I Total net assets or fund balances (see instructions)  Total net assets or fund balances (see instructions)  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)  2 Enter amount from Part I, line 27a.  3 Other increases not included in line 2 (itemize)  See Statement 4  5 4,950.	Ī	1	<b>F</b>		<del></del>	
Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.  Note of the follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.  Note of the follow SFAS 117, check here and complete lines 27 through 26 and lines 30 and 31.  Note of the follow SFAS 117, check here and complete lines 27 through 31.  24 Unrestricted	Ţ	J	· · · · · · · · · · · · · · · · · ·			
Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.  24 Unrestricted 25 Temporarily restricted 26 Permanently restricted Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.  27 Capital stock, trust principal, or current funds Retained earnings, accumulated income, endowment, or other funds 30 Total net assets or fund balances (see instructions) 31 Total net assets or fund balances (see instructions) 32 Total net assets or fund balances (see instructions) 33 Total net assets or fund balances (see instructions) 4 Analysis of Changes in Net Assets or Fund Balances 5 Enter amount from Part I, line 27a.  3 Other increases not included in line 2 (itemize)  Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize)  See Statement 4  1 166, 546. 126, 705. 126, 705. 126, 705. 126, 705. 126, 705. 126, 705. 126, 705. 126, 705. 126, 705. 126, 705. 127, 705. 128, 705. 129, 705. 119, 705. 120, 705.	Ė	j				
and complete lines 24 through 26 and lines 30 and 31.  N F UN 24 Unrestricted 25 Temporarily restricted 26 Permanently restricted 26 Permanently restricted 31.  S B A S B B A S B B A S B B A S B B A S B B A S B B A S B B A S B B A S B B A S B B B B	<u> </u>	23			0.	
D 26 Permanently restricted Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.  27 Capital stock, trust principal, or current funds 28 Paid-in or capital surplus, or land, building, and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 30 Total net assets or fund balances (see instructions) 31 Total liabilities and net assets/fund balances (see instructions)  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)  2 Enter amount from Part I, line 27a. 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) 5 A, 950.			and complete lines 24 through 26 and lines 30 and 31.			
D 26 Permanently restricted Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.  27 Capital stock, trust principal, or current funds 28 Paid-in or capital surplus, or land, building, and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 30 Total net assets or fund balances (see instructions) 31 Total liabilities and net assets/fund balances (see instructions)  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)  2 Enter amount from Part I, line 27a. 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) 5 A, 950.	N F F II		<u> </u>	166,546.	126,705.	
Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.  27 Capital stock, trust principal, or current funds 28 Paid-in or capital surplus, or land, building, and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 30 Total net assets or fund balances (see instructions) 31 Total liabilities and net assets/fund balances (see instructions)  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)  2 Enter amount from Part I, line 27a. 3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) 5 4, 950.	ŤŇ	ł	<u></u>			
S N C C E Retained earnings, accumulated income, endowment, or other funds  30 Total net assets or fund balances (see instructions)  31 Total liabilities and net assets/fund balances (see instructions)  166,546. 126,705.  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)  2 Enter amount from Part I, line 27a. 2 —34,891.  3 Other increases not included in line 2 (itemize)    4 Add lines 1, 2, and 3    5 Decreases not included in line 2 (itemize)    5 See Statement 4    5 4,950.		26	<u>-</u>			
S N C C E Retained earnings, accumulated income, endowment, or other funds  30 Total net assets or fund balances (see instructions)  31 Total liabilities and net assets/fund balances (see instructions)  166,546. 126,705.  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)  2 Enter amount from Part I, line 27a. 2 —34,891.  3 Other increases not included in line 2 (itemize)    4 Add lines 1, 2, and 3    5 Decreases not included in line 2 (itemize)    5 See Statement 4    5 4,950.	S B S A		and complete lines 27 through 31.			
S N C C E Retained earnings, accumulated income, endowment, or other funds  30 Total net assets or fund balances (see instructions)  31 Total liabilities and net assets/fund balances (see instructions)  166,546. 126,705.  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)  2 Enter amount from Part I, line 27a. 2 —34,891.  3 Other increases not included in line 2 (itemize)    4 Add lines 1, 2, and 3    5 Decreases not included in line 2 (itemize)    5 See Statement 4    5 4,950.	ΞĀ	27	Capital stock, trust principal, or current funds			
Total liabilities and net assets or fund balances (see instructions)  Total liabilities and net assets/fund balances (see instructions)  166,546.  126,705.  Part III Analysis of Changes in Net Assets or Fund Balances  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)  Enter amount from Part I, line 27a.  Other increases not included in line 2 (itemize)  Add lines 1, 2, and 3  Decreases not included in line 2 (itemize)  See Statement 4  166,546.  126,705.  166,546.  126,705.	SN	28				
Total liabilities and net assets or fund balances (see instructions)  Total liabilities and net assets/fund balances (see instructions)  166,546.  126,705.  Part III Analysis of Changes in Net Assets or Fund Balances  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)  Enter amount from Part I, line 27a.  Other increases not included in line 2 (itemize)  Add lines 1, 2, and 3  Decreases not included in line 2 (itemize)  See Statement 4  166,546.  126,705.  166,546.  126,705.	ΟĔ	29				
(see instructions)  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)  2 Enter amount from Part I, line 27a.  3 Other increases not included in line 2 (itemize)  4 Add lines 1, 2, and 3  5 Decreases not included in line 2 (itemize)  5 See Statement 4  1 166, 546.  2 -34, 891.  3 131, 655.	R S			166,546.	126,705.	
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)  2 Enter amount from Part I, line 27a.  3 Other increases not included in line 2 (itemize)  4 Add lines 1, 2, and 3  5 Decreases not included in line 2 (itemize)  5 See Statement 4  5 4,950.		31	Total liabilities and net assets/fund balances (see instructions)	166 546	126 705	
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)  Enter amount from Part I, line 27a.  Other increases not included in line 2 (itemize)  Add lines 1, 2, and 3  Decreases not included in line 2 (itemize)  See Statement 4  1 166, 546. 2 -34, 891. 3 131, 655.	Par	ETIT.		200/ <u>340.</u>	120,703.	<del> </del>
2 Enter amount from Part I, line 27a.  3 Other increases not included in line 2 (itemize)  4 Add lines 1, 2, and 3  5 Decreases not included in line 2 (itemize)  ► See Statement 4  5 4,950.		Total	net assets or fund balances at beginning of year - Part II, colum	n (a), line 30 (must agre		166 546
3 Other increases not included in line 2 (itemize) 4 Add lines 1, 2, and 3 5 Decreases not included in line 2 (itemize) 5 See Statement 4 5 4, 950.	2		· · · · · · · · · · · · · · · · · · ·		<b>⊢</b> —	
4 Add lines 1, 2, and 3       4 131,655.         5 Decreases not included in line 2 (itemize)       See Statement 4       5 4,950.				•	ļ	-34,891.
5 Decreases not included in line 2 (itemize) See Statement 4 5 4,950.	-					121 655
1/3001				1	<del></del>	
	_					126,705.

Partiv	(a) List and describe	the kind(s) of property sold (e.g., rea ; or common stock, 200 shares MLC	l estate.	b) How acquire P — Purchase D — Donation	(month, day, year)	(d) Date sold (month, day, year)
1a SE	E ATTACHED SCHEDU	ILE		P	7/07/11	5/31/12
b SE	E ATTACHED SCHEDU	LE		P	Various	Various
с						
<u>d</u>		- <del></del>				
е						
	e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale		(h) Gain or (e) plus (f) m	
<u>a</u>	346.			389.		-43.
b	57,002.		67	, 448.		10,446.
c d						
<u>a</u>				<del></del>		
	nnlete only for assets showin	g gain in column (h) and owned by the	he foundation on 12/31/69		(I) Cours (Oal)	
	Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i over column (j), if any		(I) Gains (Colugain minus column (k) than -0-) or Losses (fro	, but not less
а						-43.
b						-10,446.
С						
d						
<u>e</u>					<del></del>	
•	oital gain net income or (net o		enter in Part I, line 7 er -0- in Part I, line 7	2		-10,489.
3 Net	short-term capital gain or (lo	ess) as defined in sections 1222(5) ar	nd (6):			
<u>in F</u>	Part I, line 8	8, column (c) (see instructions). If (lo		s	<u></u>	
Part V		Section 4940(e) for Reduced foundations subject to the section 494				
Was the f	ne foundation does not qualify	on 4942 tax on the distributable amou y under section 4940(e). Do not comp	olete this part.	-	Yes	X No
1 Ent		each column for each year; see the		y entries.	(4)	
Cale	(a) Base period years ndar year (or tax year beginning in)	Adjusted qualifying distributions	(c) Net value of noncharitable-use asset:	s (co	( <b>d)</b> Distribution Dlumn (b) divided b	ratio y column (c))
	2011	133,195.	166	, 385.		0.800523
	2010	202,510.		,578.		1.153391
	2009	44,500.		,133.		0.266255
	2008	91,500.		,004.		0.332722
	2007	76,180.	382	491.	<del>-,</del>	0.199168
2 Tota	al of line 1, column (d)		• •	. 2		2.752059
		5-year base period – divide the total has been in existence if less than 5 y		3		0.550412
4 Ente	er the net value of noncharita	able-use assets for 2012 from Part X,	line 5	4		105,272.
5 Mult	tiply line 4 by line 3			5		57,943.
6 Ente	er 1% of net investment inco	me (1% of Part I line 27h)		6		2.
<b>7</b> Add	lines 5 and 6			7	-	57,945.
8 Ente	er qualifying distributions fron			8		57,945. 194,670.

	1990-PF (2012) GOTTLIEB-SCHWARTZ FAMILY FOUNDATION 13-379402	1	<u>F</u>	age 4
Par	t VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instruction	ns)		
1 a	Exempt operating foundations described in section 4940(d)(2), check here			
	Date of ruling or determination letter: (attach copy of letter if necessary — see instrs)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V,			2.
	check here ► X 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, column (b)			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			0
•	foundations only. Others enter -0-) Add lines 1 and 2.			<u>0.</u>
5	<u> </u>			2.
4	, , , , , , , , , , , , , , , , , , , ,			0.
5				2.
0	Credits/Payments:			
	2012 estimated tax pmts and 2011 overpayment credited to 2012			
	Tax paid with application for extension of time to file (Form 8868)  Backup withholding erroneously withheld  6 c			
_	1			^
7	Total credits and payments. Add lines 6a through 6d  Enter any penalty for underpayment of estimated tax. Check here			<u>0.</u>
8	——————————————————————————————————————			
9	The date. If the total of mice of and of a more than mice /, once amount of the			<u>2.</u>
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			
11 (1522)	Enter the amount of line 10 to be: Credited to 2013 estimated tax.			
Par	t VII-A   Statements Regarding Activities		17	1 44-
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?	1 a	Yes	No X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?	. 1b		X
	If the answer is 'Yes' to <b>1a</b> or <b>1b</b> , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities			
c	Did the foundation file Form 1120-POL for this year?	1 c	]	X
c	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:			
	(1) On the foundation \$\\ 0\\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \	<u>.</u>		
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers . • \$ 0.			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2	<u> </u>	X
	If 'Yes,' attach a detailed description of the activities			
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conformed copy of the changes	3		Х
4.	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4 a	<del> </del>	X
	of fives, has it filed a tax return on <b>Form 990-T</b> for this year?	4 b	<del></del>	/A
	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5	1	X
3	If 'Yes,' attach the statement required by General Instruction T	-	1-	<del>                                     </del>
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:			
Ū	By language in the governing instrument, or	•		
	• By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	X	
	Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, column (c), and Part XV	. 7	X	<u> </u>
8 a	Enter the states to which the foundation reports or with which it is registered (see instructions)			
b	of 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	8 b	Х	
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 2012 or the taxable year beginning in 2012 (see instructions for Part XIV)? If 'Yes,' complete Part XIV	9		Х
10	Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their names and addresses	10		x
BAA		Form 99	0-PF	(2012)

TEEA0304L 12/07/12

	n 990-PF (2012) GOTTLIEB-SCHWARTZ FAMILY FOUNDATION	13-37940	21	F	age <b>5</b>
ra	rt 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 instructions)		11		Х
	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified advisory privileges? If 'Yes,' attach statement (see instructions)		12		Х
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption a Website address . • N/A	pplication?	13	X	l
14		no. ► 718-	85 <b>-</b> 2	853	
	Located at ► 724 COLLFIELD AVE, STATEN ISLAND, NY STATEN ZIP+4 ►	10314			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — Check here.		Ņ/Ą	. •	
	and enter the amount of tax-exempt interest received or accrued during the year.	<b>1</b> 5			N/A
16	At any time during calendar year 2012, did the foundation have an interest in or a signature or other authority, securities, or other financial account in a foreign country?	ority over a	16	Yes	No X
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If 'Yes,' enter the nam foreign country ►	e of the			
Pai	rt 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
1 8	a During the year did the foundation (either directly or indirectly):	7v			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	Yes X No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	Yes X No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	Yes X No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	Yes X 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)?	Yes X 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.)	Yes X No			
ŀ	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 instructions)?	F7	1 b	N	/A
	Organizations relying on a current notice regarding disaster assistance check here	. 🏲 📋			
•	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 2012?		1 c		Х
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)):				
1	At the end of tax year 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012?	Yes X No			
	If 'Yes,' list the years 20 _ , 20 _ , 20 _ , 20 _				'
1	<b>b</b> Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)	(2)			
•	(relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(all years listed, answer 'No' and attach statement — see instructions.)	(2) to	2 b	N	/A
•	c If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years her 20 , 20 , 20 , 20	e.			
3 8	• Did the foundation hold more than a 2% direct or indirect interest in any business	Yes X No			
ŀ	b If 'Yes,' did it have excess business holdings in 2012 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 holdings period? (Use Schedule C, Form 4720, to	<b></b>	3 b	RT.	A
	determine if the foundation had excess business holdings in 2012 ).		3.0	IN IN	y A
4 8	a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	• •	4 a		X
ı	<b>b</b> Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of				
	the tax year beginning in 2012?		4b		X
BAA			orm <b>9</b> 9	0-PF	(2012)

Form 990-PF (2012) GOTTLIEB-SCHWARTZ	FAMILY FOUNDAT	TON	13-37	94021	Page 6
Part VII-B   Statements Regarding Activity	ties for Which For	m 4720 May Be Red	quired (continued)	74021	, ago (
5a During the year did the foundation pay or incu			<u> </u>		
(1) Carry on propaganda, or otherwise attemp	ot to influence legislation	n (section 4945(e))?	Yes X	No	
(2) Influence the outcome of any specific pub. on, directly or indirectly, any voter registra	lic election (see section ation drive?	4955); or to carry	Yes X	No	
(3) Provide a grant to an individual for travel,	•	•	Yes X	No	
(4) Provide a grant to an organization other the in section 509(a)(1), (2), or (3), or section	nan a charitable, etc, or 4940(d)(2)? (see instru	ganization described ctions)	Yes X	No	
(5) Provide for any purpose other than religion educational purposes, or for the prevention	us, charitable, scientific n of cruelty to children o	, literary, or or animals?	Yes X	No	
b If any answer is 'Yes' to 5a(1)-(5), did any of t described in Regulations section 53.4945 or in (see instructions)?	he transactions fail to q a current notice regard	ualify under the exceptions disaster assistance	ons	56	N/A
Organizations relying on a current notice regains	rding disaster assistanc	e check here	. ▶ 🗀		
c If the answer is 'Yes' to question 5a(4), does to tax because it maintained expenditure responsi	sibility for the grant?		.N/A . Yes	No	
If 'Yes,' attach the statement required by Regulation 6 a Did the foundation, during the year, receive an		• •			
on a personal benefit contract?	•			No	
<b>b</b> Did the foundation, during the year, pay premi If 'Yes' to 6b, file Form 8870	ums, airectly or indirect	iy, on a personai beneti	t contract?	6 b	X
7 a At any time during the tax year, was the found	· · ·			No	
b If 'Yes,' did the foundation receive any procee  Part VIII Information About Officers, Dir				I/A 7b	
and Contractors	cciois, musicos, i c	andation managers	, mgmy raid Empr	oyees,	
1 List all officers, directors, trustees, foundation	managers and their co	mpensation (see instru	ctions).		
(a) Name and address	(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				
MICHAEL GOTTLIEB	President	0.	0.		0.
724 COLLFIELD AVE STATEN ISLAND, NY 10314	0				
STEVEN SCHWARTZ 29 WALCOTT AVE	Treasurer 0	0.	0.		0.
STATEN ISLAND, NY 10314	0			_	
			· · · · · · · · · · · · · · · · · · ·		
2 Compensation of five highest-paid employees	other than those inclu	ided on line 1 — see ins	tructions). If none, ente	r '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		se account, illowances
None					
			<del></del>		·
			-		·
Total number of other employees paid over \$50,000	<u> </u>			<del></del>	
Time tarings, or other ornprojects para ever 400,000					J-PF (2012)

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Empland Contractors (continued)	oyees,
3 Five highest-paid independent contractors for professional services (see instructions). If none, enter 'NONE.'	<del></del>
(a) Name and address of each person paid more than \$50,000 (b) Type of service	(c) Compensation
None	<del>                                     </del>
<u></u>	<u> </u>
Total number of others receiving over \$50,000 for professional services	.†
	<u>.                                    </u>
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 N/A	
	<u> </u>
2	
	.[
3	<del> </del>
	1
	<u> </u>
4	
	1
Part IX-B Summary of Program-Related Investments (see instructions)	
Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1	
N/A	ļ
	<u> </u>
2	
All other program-related investments. See instructions.	<u> </u>
3	
T-11-A-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1-1	
Total. Add lines 1 through 3  BAA	0. Form <b>990-PF</b> (2012)
	1 UIIII 220-FF (4014)

	13-3794021	Page 8
Part X   Minimum Investment Return (All domestic foundations must complete this part. see instructions.)	Foreign found	dations,
Fair market value of assets not used (or held for use) directly in carrying out charitable, etc, purposes:     Average monthly fair market value of securities		72 455
<b>b</b> Average of monthly cash balances	1 a	73,455.
c Fair market value of all other assets (see instructions)	1 c	33,420.
d Total (add lines 1a, b, and c)	1 d	106,875.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c	'	100,073.
	).	
2 Acquisition indebtedness applicable to line 1 assets	/ <del>-</del>   2	0.
3 Subtract line 2 from line 1d	3	106,875.
•	<del>                                     </del>	100,073.
4 Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	1,603.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	105,272.
6 Minimum investment return. Enter 5% of line 5.	6	5,264.
Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operand certain foreign organizations check here ► ☐ and do not complete this part.)		<del>,</del>
1 Minimum investment return from Part X, line 6	1	5,264.
	2.]	
b Income tax for 2012. (This does not include the tax from Part VI.)	_	_
c Add lines 2a and 2b.	2 c	<u> </u>
3 Distributable amount before adjustments. Subtract line 2c from line 1	3	5,262.
4 Recoveries of amounts treated as qualifying distributions	4	
<b>5</b> Add lines 3 and 4	5	5,262.
6 Deduction from distributable amount (see instructions) .	6	
7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	5,262.
Part XII Qualifying Distributions (see instructions)		
1 Amounts paid (including administrative expenses) to accomplish charitable, etc, purposes:		104 670
a Expenses, contributions, gifts, etc – total from Part I, column (d), line 26	1 a	194,670.
b Program-related investments — total from Part IX-B	1 b	
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc, purposes	. 2	

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 instructions)

Adjusted qualifying distributions. Subtract line 5 from line 4

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.

Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4

3 Amounts set aside for specific charitable projects that satisfy the: a Suitability test (prior IRS approval required)

**b** Cash distribution test (attach the required schedule)

BAA

Form 990-PF (2012)

194,670.

3а

3 b

## Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2011	<b>(c)</b> 2011	<b>(d)</b> 2012
1 Distributable amount for 2012 from Part XI, line 7				
2 Undistributed income, if any, as of the end of 2012.				5,262.
a Enter amount for 2011 only			0.	
<b>b</b> Total for prior years: 20, 20, 20		0.		
3 Excess distributions carryover, if any, to 2012				
a From 2007 57, 493.			*	
b From 2008 77, 906. c From 2009 36, 203.				
c From 2009 36, 203. d From 2010 193, 731.			1	
e From 2011 . 124,882.			1	
f Total of lines 3a through e	490,215.			
4 Qualifying distributions for 2012 from Part	,			······································
XII, line 4: ► \$ 194,670.			‡ ‡	
a Applied to 2011, but not more than line 2a			0.	······································
<b>b</b> Applied to undistributed income of prior years (Election required — see instructions)		0.		
c Treated as distributions out of corpus			<b>1</b>	
(Election required — see instructions)  d Applied to 2012 distributable amount	0.			5,262.
e Remaining amount distributed out of corpus	189,408.			5,202.
5 Excess distributions carryover applied to 2012	0.			0.
(If an amount appears in column (d), the same amount must be shown in column (a) )				
			1	
6 Enter the net total of each column as			1	
indicated below: a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	670 622		ŧ	
·	679,623.			·····
<b>b</b> Prior years' undistributed income, Subtract line 4b from line 2b		0.	Ī	
c Enter the amount of prior years' undistribut-				
ed income for which a notice of deficiency has been issued, or on which the section			<b>‡</b>	
4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable			1	
amount - see instructions		0.		······································
e Undistributed income for 2011. Subtract line 4a from line 2a. Taxable amount — see instructions			0.	
				<del></del>
f Undistributed income for 2012. Subtract lines 4d and 5 from line 1. This amount must be			1	
distributed in 2013				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed			‡ ‡	
by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0.		1	*
`		<del></del>		
8 Excess distributions carryover from 2007 not applied on line 5 or line 7 (see instructions)	57,493.			
9 Excess distributions carryover to 2013.	•			······································
Subtract lines 7 and 8 from line 6a	622,130.			······
10 Analysis of line 9:			1	
<b>a</b> Excess from 2008 77, 906. <b>b</b> Excess from 2009 36, 203.			1	
c Excess from 2010193,731.			1	
d Excess from 2011 124, 882.			1	
e Excess from 2012 189, 408.				
ΔΔ				orm 990-PE (2012)

Form 990-PF (2012) GOTTLIEB-SCHWART				13-379402	
Part XIV   Private Operating Founda	<del></del>				N/A
is effective for 2012, enter the date of the	ruling .		,	, and the running	
<b>b</b> Check box to indicate whether the foundat		rating foundation de		4942(j)(3) or	4942(j)(5)
2a Enter the lesser of the adjusted net income from Part I or the minimum	Tax year		Prior 3 years	<u></u>	
investment return from Part X for each year listed	(a) 2012	<b>(b)</b> 2011	(c) 2010	(d) 2009	(e) Total
<b>b</b> 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
<ul> <li>Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c</li> </ul>					
3 Complete 3a, b, or c for the alternative test relied upon:					
a 'Assets' alternative test - enter:					
(1) Value of all assets			1		
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b Endowment' alternative test — enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c 'Support' alternative test - enter:					
<ol> <li>Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)</li> </ol>				-	
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(III)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income .					
Part XV   Supplementary Information assets at any time during the	(Complete this ne year — see ii	s part only if the netructions.)	e foundation ha	d \$5,000 or mor	e in
1 Information Regarding Foundation Manag a List any managers of the foundation who had close of any tax year (but only if they have See Statement 5	nave contributed mo	ore than 2% of the than \$5,000). (See	otal contributions res section 507(d)(2).)	ceived by the founda	ition before the
<b>b</b> List any managers of the foundation who ca partnership or other entity) of which the None	own 10% or more of foundation has a 10	the stock of a corp % or greater intere	ooration (or an equal st.	ly large portion of th	e ownership of
2 Information Regarding Contribution, Gran Check here  X if the foundation only m requests for funds. If the foundation makes complete items 2a, b, c, and d.	nakes contributions	to preselected char	ritable organizations	and does not accep	t unsolicited conditions,
a The name, address, and telephone numbe	r or e-mail of the p	erson to whom app	lications should be a	ddressed:	
<b>b</b> The form in which applications should be s	submitted and inforr	nation and material	s they should includ	e:	
c Any submission deadlines:					
d Any restrictions or limitations on awards, s	uch as by geograph	nical areas, charitat	ole fields, kinds of in	stitutions, or other fa	actors:

Part XV | Supplementary Information (continued) 3 Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, show any relationship to any foundation manager or substantial contributor Foundation Recipient Purpose of grant or contribution status of recipient **Amount** Name and address (home or business) a Paid during the year 194,670. SEE ATTACHED SEE ATTACHED SCHEDULE N/A N/A , NY ► 3a 194,670. b Approved for future payment

► 3b

Total

## Part XVI-A Analysis of Income-Producing Activities

				<del> </del>			
Enter	gross	amounts unless otherwise indicated.	Unrelated I	business income	Excluded by s	ection 512, 513, or 514	(e)
1	Progr	am service revenue;	(a) Business code	<b>(b)</b> Amount	(c) Exclu- sion code	<b>(d)</b> Amount	Related or exempt function income (See instructions.)
' a		an service revenue.	<del></del>		code		
			<del></del>	<del></del>	<del></del>		<del></del>
b			<b></b>	· · · · · · · · · · · · · · · · · · ·	<del></del>		
C			<del></del>				
d							
е							
f							
g	Fees	and contracts from government agencies					
2	Memb	pership dues and assessments			T 7		
3	Interest	t on savings and temporary cash investments					
4	Divide	ends and interest from securities .			14	238.	
5	Net re	ental income or (loss) from real estate:		······································			······································
		financed property	······································				
		ebt-financed property			<del>                                     </del>		<del></del>
		ital income or (loss) from personal property	<del></del>		<del>-  -</del>		
		investment income			14	20	
					14	30.	
		(loss) from sales of assets other than inventory			18	-10,489.	<del></del>
		come or (loss) from special events					
		profit or (loss) from sales of inventory					
11	Other	revenue:				<u></u>	
а							
b							
С							
d							
е							
12	Subto	tal. Add columns (b), (d), and (e)				-10,221.	<del></del>
		Add line 12, columns (b), (d), and (e)		<del></del>	<u></u>	13	-10,221.
		neet in line 13 instructions to verify calculations	. )		•	. , , , ,	10,221.
						<del></del>	<del> </del>
Pari	XVI	Relationship of Activities to the	Accomplish	nment of Exem	pt Purpose	S	
	•	<u> </u>					
	No.	Explain below how each activity for which inco accomplishment of the foundation's exempt p	ome is reported Lirnoses (other	i in column (e) of P than by providing f	art XVI-A conti	ributed importantly to	the actions )
		addomptistment of the tourisation's exempt p		- Providing (			
N	/A			·		<del></del>	
				····	<del></del>		
			· · · · · · · · · · · · · · · · · · ·				
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		<del></del>					

## Form 990-PF (2012) GOTTLIEB-SCHWARTZ FAMILY FOUNDATION 13-3794021 Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

1 [	ad the	organization directly	or indirectly o	passe in any	of the follow	una with a	ny oth	or organization				Yes	No
d	escribe	d in section 501(c)	of the Code (of	ther than section	on 501(c)(3	i) organiza	itions)	or in section 5	27,				
	~	to political organiza										1	
		s from the reporting	j foundation to	a noncharitab	le exempt o	organizatio	on of:						
•	I) Casi										1 a (1)	<u> </u>	X
	•	er assets,	• •	• •							1 a (2)	ļ	X
		ansactions:											
-	-	s of assets to a nor				• • • • • •	• •	• •			1 b (1)		X
		hases of assets fro			ganızatıon			•			1 b (2)		X
(3	Ren	tal of facilities, equi	pment, or othe	r assets					•		1 b (3)		X
(4	i) Rein	nbursement arrange	ments .	•		•	•	•			1 b (4)		<u>X</u>
•	•	ns or Ioan guarantee			•			•			1 b (5)		X
(6	) Perf	ormance of service:	s or membersh	iip or fundraisii	ng solicitati	ons					1 b (6)		X
c S	harıng	of facilities, equipm	ent, mailing lis	its, other asset	ts, or paid e	employe <b>e</b> s	<b>.</b>				1 c		X
tr	ne good	swer to any of the a ls, other assets, or saction or sharing a	services given	by the reporting	ng foundati	on. If the f	oundat	tion received le	ess than fai	r market i	value in	) Of	
(a) Line		(b) Amount involved	<del></del>	of noncharitable ex	<del></del>			Description of tran				gement	<u> </u>
N/A	-	(b) / mileant mileates	(6)	or mononarmative or	Norript organiza	-	(4)	Door, priori di tra	101010, 11211000			90,,,,,,,	<u> </u>
14/11	-+-		<del>                                     </del>			<del></del>		<del></del>					
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			<u> </u>										
d	escribe	undation directly or d in section 501(c)	of the Code (ot	ated with, or re ther than section	elated to, or on 501(c)(3	ne or more )) or in sec	tax-ex ction 5	xempt organiza 27?	ations		Yes	X	No
D IT	<u>_</u>	complete the follow		4.3 T.		0170trop			) Description	m of valo	t.anah.n		
NT / B	(a)	Name of organizat		( <b>a)</b> 1 y	pe of organ	ilzation			) Description	il oi reia	lionship		
N/A				<del></del>									
				<del> </del>									
				<del> </del>									
				<del> </del>					<del></del>				
	Linda, a		Had I barra arrange	d the control of the control				ante and to the best	of many lamps and and		Cata de la		
	correct,	naltres of perjury, I declare and complete Declaration	that I have examined a of preparer (other	than taxpayer) is t	ig accompanyin based on all in	g schedules an formation of v	which pre	eparer has any kno	or my knowied wledge	je and beller	, it is true,		
Sign		1.1.	1-1	-A	_1.	1.					May the I		
Here	N	uffeel &	Jourle	U-	1518	13	P	resident			preparer (see instr	shown b	pelow
	Signat	ure of officer or trustee	·	<del></del>	Date	<del></del>	Titl					Yes	No
		Print/Type preparer's na	me	Preparer	r's signature			Date	Check	If	PTIN		
Paid		Yecheskel Mond	rowitz,CPA	Yeche	skel Mond	drowitz.	CPA	5/08/13	self-emp	loyed	P001981	18	
r ara Prepa	rer		Saul N. Frie					<del></del>	Firm's EIN				
Use O		_	201 Fifteen		· <del>* · · · · · · · · · · · · · · · · · ·</del>			<del></del>		<u></u>			
JJ5 0	,		rooklyn, NY						Phone no	(718)	232-111	1	
BAA		<del>'</del>									Form <b>990</b>		2012)

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

Department of the Treasury Internal Revenue Service

## **Schedule of Contributors**

► Attach to Form 990, Form 990-EZ, or Form 990-PF

OMB No 1545-0047

2012

Name of the organization		Employer Identification number
GOTTLIEB-SCHWARTZ FAMILY	13-3794021	
Organization type (check one):		
Filers of:	Section:	
Form 990 or 990-EZ	501(c)() (enter number) or	ganization
	4947(a)(1) nonexempt charitable t	trust <b>not</b> treated as a private foundation
	527 political organization	
	_	
Form 990-PF	X 501(c)(3) exempt private foundation	on
	4947(a)(1) nonexempt charitable t	trust treated as a private foundation
	501(c)(3) taxable private foundation	on
Check if your organization is covered by	y the General Rule or a Special Rule	
Note. Only a section 501(c)(7), (8), or (1)	10) organization can check boxes for both the C	General Rule and a Special Rule. See instructions.
General Rule	, ,	·
	990-EZ, or 990-PF that received, during the yell.)	ear, \$5,000 or more (in money or property) from any one
Special Rules		
For a section 501(c)(3) organization 509(a)(1) and 170(b)(1)(A)(vi) and r. (2) 2% of the amount on (i) Form 99	filing Form 990 or 990-EZ that met the 33-1/3% eceived from any one contributor, during the year, Part VIII, line 1h or (ii) Form 990-EZ, line 1.	% support test of the regulations under sections ear, a contribution of the greater of (1) \$5,000 or . Complete Parts I and II
total contributions of more than \$1.0	organization filing Form 990 or 990-EZ that reco 000 for use <i>exclusively</i> for religious, charitable, or animals. Complete Parts I, II, and III.	served from any one contributor, during the year, scientific, literary, or educational purposes, or
contributions for use exclusively for lf this box is checked, enter here the	religious, charitable, etc, purposes, but these of total contributions that were received during t	erived from any one contributor, during the year, contributions did not total to more than \$1,000. the year for an <i>exclusively</i> religious, charitable, etc, organization because it received nonexclusively
religious, charitable, etc, contributio	ons of \$5,000 or more during the year	<b>▶</b> \$
Caution: An organization that is not covered by the answer 'No' on Part IV, line 2, of its Form 990; meet the filing requirements of Schedul	General Rule and/or the Special Rules does not file Schedul or check the box on line H of its Form 990-EZ or on Par e B (Form 990, 990-EZ, or 990-PF).	ale B (Form 990, 990-EZ, or 990 PF) but it <b>must</b> art I, line 2, of its Form 990-PF, to certify that it does not
BAA For Paperwork Reduction Act No or 990-PF.	tice, see the Instructions for Form 990, 990EZ,	Schedule <b>B</b> (Form 990, 990-EZ, or 990-PF) (2012)

Name of org	B (Form 990, 990-EZ, or 990-PF) (2012)	Page Temploye	1 of 1 of Part 1
-	EB-SCHWARTZ FAMILY FOUNDATION		794021
Part I	Contributors (see instructions). Use duplicate copies of Part I if additional space is neede	d.	
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	MICHAEL GOTTLIEB  724 COLLFIELD AVE  STATEN ISLAND, NY 10314	\$ <u>170,000</u> .	Person X  Payroll   Noncash   (Complete Part II if there is a noncash contribution.)
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Oncash Complete Part II if there is a noncash contribution.)
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$ 	Person Payroll Oncash Complete Part II if there is a noncash contribution.)
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$ 	Person Payroll Noncash  (Complete Part II if there is a noncash contribution.)
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$ \$	Person Payroll Noncash  (Complete Part II if there is a noncash contribution.)
(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person Payroll Oncash Complete Part II if there is a noncash contribution Part II if there is
		<del></del>	<del></del>

1 to

1 of Part II

GOTTLIEB-SCHWARTZ FAMILY FOUNDATION

13-3794021

Employer Identification number

Part II	Noncash Property (see instructions). Use duplicate copies of Part II if additional sp	pace is needed.	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
	N/A		
		-	
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
<u>-</u> "			
		\$	
(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		-	
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		-	}
<del></del>		]  \$	
(a) No. from Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		}	
		]  \$	
(a) No. from ' Part I	(b)  Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		_	
<del></del> _		\$	
BAA		edule <b>B</b> (Form 990, 990-E2	2 000 551 (551)

Schedule E	, 3 (Form 990, 990-EZ, or 990-PF) (2012)			Page 1 to	1 of Part III
Name of organ		NT		Employer identific	
Part III	organizations that total more than For organizations completing Part III, enter contributions of \$1,000 or less for the year.	t, individual contributions to \$1,000 for the year. Comp total of exclusively religious, character this information once. Se	lete columns (a aritable, etc.	a) through (e) and the followin	
(a) No. from Part I	Use duplicate copies of Part III if additional  (b)  Purpose of gift	space is needed. (c) Use of gift		(d) Description of how	gift is held
	N/A				
	Transferee's name, addres	(e) Transfer of gift ss, and ZIP + 4	Rela	ationship of transferor to tra	ınsferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift		(d) Description of how g	gift is held
	Transferee's name, addres	(e) Transfer of gift ss, and ZIP + 4	Rela	ationship of transferor to tra	nsferee
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	-	(d) Description of how o	gift is held
	(e) Transfer of gift Transferee's name, address, and ZIP + 4		Rela	ationship of transferor to tra	nsferee
1					
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift		(d) Description of how g	jift is held
	Transferee's name, addres	(e) Transfer of gift s, and ZIP + 4	Rela	ationship of transferor to tra	nsferee
	İ	l			

# Fiscal Statement

## GOTTLIEB-SCHWARTZ FAMILY

# **CURRENT PORTFOLIO SUMMARY**

# Mutual Funds/Closed End Funds/UIT

183 00

1.00

(2,685 27)		(0 11)	1,527 86
25,694.24	22.46	0.63	10,644,48
28,379.51)	~	0 74	9,116 62 🗸
01/05/07	01/08/10	01/05/07	01/05/07
✓ 2,288 BLACKROCK LARGE CAP CORE FD C	BLACKROCK LARGE CAP	0560 Fractional Share	512 BLACKROCK CAPITAL APPRECIATION FD, INC C
2,288	<i>y</i> , 2	-	512

Account No 831-04015 PLEASE SEE REVERSE SIDE
Page Statement Period
5 of 14 Year Ending 12/31/12

X 05540546

Account No 831-04015

## **Gottlieb - Schwartz Family Foundation**

## Employer ID # 13-3794021 Charitable Contributions Year ending December 31, 2012 PART XV

e.

Purpose of Contribution - Legend:

A = Educational assisfance

B = Assistance for the sick and needy

C = Educational Scholarships

D = Synagogue operating expenses

Payments from Merrill Lynch Account # 833-04011	Amount	Purpose
AMERICAN FRIENDS OF TORAH	2,500 00	Α
BUSINESS HALACHA INSTITUTE	1,000 00	Α
BAIS HALEVI	500.00	В
BIKUR CHOLIM OF SI	2,000.00	В
CHABAD	360 00	В
CONGREGATION SHOMREI HADAAS	5,000 00	D
CONGREGATION AHAVAS YISROEL	3,900.00	D
DEENA JACOBS FUND	1,000.00	В
GATEWAYS IN RELIGION	6,400.00	С
HATZOLO	3,800.00	Α
HEBREW ACADEMY OF LI	10,000 00	С
JEWISH AID COMMITTEE	1,000.00	В
JEWISH FOUNDATION SCHOOL	85,500.00	С
KHAL APEL	250 00	В
MESIVYA KESSER YISROEL	1,000 00	С
NER ISRAEL RABBINICAL COLLEGE	15,800 00	С
OHEL	500 00	Α
ORG. FOR THE LOST SOUL	2,300.00	Α
NEVAI ZION	10,000.00	Α
NESIVOS HATORAH	3,000.00	С
OORAH	250 00	Α
PROSPECT PARK YESHIVA	4,000.00	С
RABBI JACOB JOSEPH SCHOOL	5,000 00	С
SHOR YOSHUV	15,000.00	В
YESHIVAS DERECH HATORAH	10,000.00	Α
YESHIVA RADIN	500 00	С
YOUNG ISRAEL OF SI	4,110.00	D
	194,670.00	

2012 Federa	Statements	Page 1
Client GOTSCHWF GOTTLIEB-SCHWAI	RTZ FAMILY FOUNDATION	13-3 <b>794</b> 021
5/08/13		02:46PM
Statement 1 Form 990-PF, Part I, Line 11 Other Income		
	(a) (b) Net Revenue Investmen per Books Income	(c) t Adjusted <u>Net Income</u>
Other Investment Income	otal \$ 30. \$ 30.\$	0.\$ 0.
Statement 2 Form 990-PF, Part II, Line 10c Investments - Corporate Bonds		
Composato Pondo	Valuation Book Method Value	Fair Market Value
Corporate Bonds BANK OF AMERICA	Mkt Val \$ 15,00 Total \$ 15,00	
Statement 3 Form 990-PF, Part II, Line 13 Investments - Other	Valuation Book <u>Method Value</u>	Fair Market Value
Other Publicly Traded Securities		
MUTUAL FUNDS- SEE STATEMENT	Cost \$ 37,49	7. \$ 36,361.
	Total \$ 37,49	36,361.
Statement 4 Form 990-PF, Part III, Line 5 Other Decreases		
Investment Expenses Net Unrealized Gains or Losses on Invest	tments Tot	$\begin{array}{cccccccccccccccccccccccccccccccccccc$
Statement 5 Form 990-PF, Part XV, Line 1a Foundation Managers - 2% or More Contributors		. !
MICHAEL GOTTLIEB STEVEN SCHWARTZ		! 

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