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Form

990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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Information about Form 990-PF and its instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2014

Open to Public Inspection

For calendar year 2014, or tax year beginning 01-01-2014 , and ending 12-31-2014

Name of foundation THE WIDGEON POINT CHARITABLE FOUNDATION F/K/A THE BEINECKE FOUNDATION INC		A Employer identification number 13-6201175	
Number and street (or P O box number if mail is not delivered to street address) CSV 50 CHAS LINDBERGH BLVD STE 605		B Telephone number (see instructions) (516) 483-5800	
City or town, state or province, country, and ZIP or foreign postal code UNIONDALE, NY 11553		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply <div><input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change</div> <div><input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change</div>		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <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		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 59,329,252		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)			

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 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)	0			
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	178	178		
	4 Dividends and interest from securities.	1,590,912	1,590,912		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	2,910,087			
	b Gross sales price for all assets on line 6a 15,216,057				
	7 Capital gain net income (from Part IV, line 2) . . .		2,910,087		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	15,575	15,575		
	12 Total. Add lines 1 through 11	4,516,752	4,516,752		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	352,083	140,833		211,250
	14 Other employee salaries and wages	321,379	176,552		144,827
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	160,000	80,000		80,000
	c Other professional fees (attach schedule)	61,772	30,886		30,886
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	39,300	16,774		19,074
	19 Depreciation (attach schedule) and depletion	4,223	0		
	20 Occupancy	37,260	18,630		18,630
	21 Travel, conferences, and meetings	4,041	2,021		2,020
	22 Printing and publications				
	23 Other expenses (attach schedule)	722,678	529,862		210,816
	24 Total operating and administrative expenses. Add lines 13 through 23	1,702,736	995,558		717,503
	25 Contributions, gifts, grants paid	1,923,963			1,923,963
	26 Total expenses and disbursements. Add lines 24 and 25	3,626,699	995,558		2,641,466
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	890,053			
	b Net investment income (if negative, enter -0-)		3,521,194		
	c Adjusted net income (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	7,182,213	8,893,085	8,893,085
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____	625		
	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 instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges		9,751	9,751
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)			
	c	Investments—corporate bonds (attach schedule).			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	44,159,913	41,967,435	50,383,760
	14	Land, buildings, and equipment basis ▶ _____ 45,297 Less accumulated depreciation (attach schedule) ▶ 7,766	14,174	37,531	37,531
15	Other assets (describe ▶ _____)	5,125	5,125	5,125	
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	51,362,050	50,912,927	59,329,252	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)	74,368	56,939	
	23	Total liabilities (add lines 17 through 22)	74,368	56,939	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> 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 ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds	0	0	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	51,287,682	50,855,988	
	30	Total net assets or fund balances (see instructions)	51,287,682	50,855,988	
	31	Total liabilities and net assets/fund balances (see instructions) . . .	51,362,050	50,912,927	

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 51,287,682
2	Enter amount from Part I, line 27a	2 890,053
3	Other increases not included in line 2 (itemize) ▶ _____	3 0
4	Add lines 1, 2, and 3	4 52,177,735
5	Decreases not included in line 2 (itemize) ▶ _____	5 1,321,747
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6 50,855,988

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	See Additional Data Table			
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 See Additional Data Table			
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) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a See Additional Data Table			
b			
c			
d			
e			

2	Capital gain net income or (net capital loss)	<div>If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7</div>	2	2,910,087
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) <div>If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8</div>		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 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))
2013	2,881,338	44,381,188	0 064923
2012	2,937,266	44,887,913	0 065436
2011	0	0	0 000000
2010	3,566,010	62,889,675	0 056703
2009	3,088,801	58,774,906	0 052553

2	Total of line 1, column (d).	2	0 239615
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 047923
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5.	4	57,409,857
5	Multiply line 4 by line 3.	5	2,751,253
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	40,000
7	Add lines 5 and 6.	7	3,108,000
8	Enter qualifying distributions from Part XII, line 4.	8	2,880,000

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

Part VI

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

1a		Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1			
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		1	70,424
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	70,424
4		Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0
5		Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	70,424
6		Credits/Payments			
a		2014 estimated tax payments and 2013 overpayment credited to 2014	6a	89,026	
b		Exempt foreign organizations—tax withheld at source	6b		
c		Tax paid with application for extension of time to file (Form 8868)	6c		
d		Backup withholding erroneously withheld	6d		
7		Total credits and payments. Add lines 6a through 6d.		7	89,026
8		Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached.		8	
9		Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	
10		Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	18,602
11		Enter the amount of line 10 to be Credited to 2015 estimated tax <input type="checkbox"/> 18,602 Refunded <input type="checkbox"/>		11	0

Part VII-A

Statements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	Yes	No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? <i>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.</i>	1b		No
c	Did the foundation file Form 1120-POL for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation <input type="checkbox"/> \$ 0 (2) On foundation managers <input type="checkbox"/> \$ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>	2		No
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? <i>If "Yes," attach a conformed copy of the changes.</i>	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	Yes	
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b	Yes	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions): <input type="checkbox"/> NY			
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? <i>If "No," attach explanation.</i>	8b	Yes	
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 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV.</i>	9		No
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	10		No

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 instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address N/A				
14	The books are in care of COOPERSMITH SIMON VOGEL CPA'S Telephone no (516) 483-5800 Located at 50 CHARLES LINDBERGH BLVD SUITE 605 UNIONDALE NY ZIP +4 11553			
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.	15		
16	At any time during calendar year 2014, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country				

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? Yes No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?. Yes No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes 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 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 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 instructions)? Organizations relying on a current notice regarding disaster assistance check here.	1b		
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 2014?.	1c		No
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 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014?. If "Yes," list the years 20 , 20 , 20 , 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 instructions).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here 20 , 20 , 20 , 20			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?. Yes No			
b	If "Yes," did it have excess business holdings in 2014 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 2014.).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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 2014?	4b		No

5a	<p>During the year did the foundation pay or incur any amount to</p> <p>(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(3) Provide a grant to an individual for travel, study, or other similar purposes? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p> <p>(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p>		
b	<p>If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? 5b</p> <p>Organizations relying on a current notice regarding disaster assistance check here. <input checked="" type="checkbox"/></p>		
c	<p>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? <input type="checkbox"/> Yes <input type="checkbox"/> No</p> <p><i>If "Yes," attach the statement required by Regulations section 53.4945–5(d).</i></p>		
6a	<p>Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p>		
b	<p>Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? 6b</p> <p><i>If "Yes" to 6b, file Form 8870.</i></p>		No
7a	<p>At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</p>		
b	<p>If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? 7b</p>		

1 List all officers, directors, trustees, foundation managers and their compensation (see 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
JOHN R ROBINSON	PRESIDENT 35 00	352,083	0	0
C/O CSV CPAS 50 CHARLES LINDBERGH BLVD UNIONDALE, NY 11553				
ABIGAIL PHIPPS BOWERS	VICE PRESIDENT 10 00	0	0	0
C/O CSV CPAS 50 CHARLES LINDBERGH BLVD UNIONDALE, NY 11553				
ROWLAND P ROBINSON	TREASURER 10 00	0	0	0
C/O CSV CPAS 50 CHARLES LINDBERGH BLVD UNIONDALE, NY 11553				

2 Compensation of five highest-paid employees (other than those included on line 1—see 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
JEFFREY COOPERSMITH C/O CSV 50 CHAS LINDBERGH STE 605 UNIONDALE,NY 11553	CFO 35 00	160,000	0	0
ANN BOLAND C/O CSV 50 CHAS LINDBERGH STE 605 UNIONDALE,NY 11553	EXECUTIVE ASSISTANT 35 00	90,225	0	0

Total number of other employees paid over \$50,000.	0
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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 instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
COOPERSMITH SIMON & VOGEL PC	ACCOUNTING AND TAX SERVICES	160,000
50 CHARLES LINDBERGH BLVD STE 605		
UNIONDALE, NY 11553		
Total number of others receiving over \$50,000 for professional services.		0

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	0
2	
3	
4	

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 NONE	0
2	
All other program-related investments See instructions	
3	0
Total. Add lines 1 through 3	0

Part X

Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	50,657,054
b	Average of monthly cash balances.	1b	7,627,065
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	58,284,119
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	58,284,119
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	874,262
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	57,409,857
6	Minimum investment return. Enter 5% of line 5.	6	2,870,493

Part XI

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

1	Minimum investment return from Part X, line 6.	1	2,870,493
2a	Tax on investment income for 2014 from Part VI, line 5.	2a	70,424
b	Income tax for 2014 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	70,424
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	2,800,069
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	2,800,069
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	2,800,069

Part XII

Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26.	1a	2,641,466
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	
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	2,641,466
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 instructions).	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	2,641,466
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 instructions)

	(a) Corpus	(b) Years prior to 2013	(c) 2013	(d) 2014
1 Distributable amount for 2014 from Part XI, line 7				2,800,069
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2014				
a From 2009.				
b From 2010.				
c From 2011.				
d From 2012.				
e From 2013.				620,349
f Total of lines 3a through e.	620,349			
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ \$ 2,641,466				
a Applied to 2013, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2014 distributable amount.				2,641,466
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a).)	158,603			158,603
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	461,746			
b Prior years' undistributed income Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2013 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions). . . .	0			
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a	461,746			
10 Analysis of line 9				
a Excess from 2010.				
b Excess from 2011.				
c Excess from 2012.				
d Excess from 2013.				461,746
e Excess from 2014.				

Part XIVPrivate Operating Foundations (see instructions and Part VII-A, question 9)

1a

If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2014, enter the date of the ruling.

b

Check box to indicate whether the organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.	Tax year	Prior 3 years			(e) Total
		(a) 2014	(b) 2013	(c) 2012	(d) 2011	
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.					
e	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c.					
3	Complete 3a, b, or c for the alternative test relied upon					
a	"Assets" alternative test—enter					
	(1) Value of all assets					
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b	"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c	"Support" alternative test—enter					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties).					
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
	(3) Largest amount of support from an exempt organization					
	(4) Gross investment income					

Part XVSupplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see instructions.)

1

Information Regarding Foundation Managers:

a

List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))

b

List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

2

Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a

The name, address, and telephone number or e-mail address of the person to whom applications should be addressed

JEFFREY COOPERSMITH
50 CHARLES LINDBERGH BLVD
UNIONDALE, NY 11553
(516) 483-5800

b

The form in which applications should be submitted and information and materials they should include

NONE

c

Any submission deadlines

NONE

d

Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors

NONE

Form 990-PF (2014)

Part XV

Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	1,923,963
b Approved for future payment				
Total			3b	0

Enter gross amounts unless otherwise indicated

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Form **990-PF** (2014)

Part XVII

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

1

Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

Yes

No

a

Transfers from the reporting foundation to a noncharitable exempt organization of

(1)

Cash.

1a(1)

No

(2)

Other assets.

1a(2)

No

b

Other transactions

(1)

Sales of assets to a noncharitable exempt organization.

1b(1)

No

(2)

Purchases of assets from a noncharitable exempt organization.

1b(2)

No

(3)

Rental of facilities, equipment, or other assets.

1b(3)

No

(4)

Reimbursement arrangements.

1b(4)

No

(5)

Loans or loan guarantees.

1b(5)

No

(6)

Performance of services or membership or fundraising solicitations.

1b(6)

No

c

Sharing of facilities, equipment, mailing lists, other assets, or paid employees.

1c

No

d

If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.

(a) Line No	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements

2a

Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?

☐

Yes

☒

No

b

If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

2015-11-16

Signature of officer or trustee

Date

Title

May the IRS discuss this return with the preparer shown below (see instr)?

☒

Yes

☐

No

Paid Preparer Use Only

Print/Type preparer's name

JEFF COOPERSMITH

Preparer's Signature

Date

Check if self-employed

☐

PTIN

P01293530

Firm's name

COOPERSMITH SIMON & VOGEL PC

Firm's address

50 CHARLES LINDBERGH BLVD STE 605
UNIONDALE, NY 11553

Firm's EIN

27-0120069

Phone no

(516) 483-5800

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
VARIOUS TRADES ON BNY MELLON #6830	P	2001-01-01	2014-12-31
KINDER MORGAN TRADES ON BNY MELLON #6830	P	2001-01-01	2014-12-31
VARIOUS TRADES ON FIDELITY #0156	P	2001-01-01	2014-12-31
VARIOUS TRADES ON MORGAN STANLEY #0904	P	2001-01-01	2014-12-31
NUSTAR ENERGY TRADE ON BNY MELLON #6830	P	2001-01-01	2014-12-31
BLACKSTONE GROUP LP	P	2001-01-01	2014-12-31
ENTERPRISE PRODUCTS PTR LP	P	2001-01-01	2014-12-31
KKR & CO LP	P	2001-01-01	2014-12-31
ONEOK PARTNERS LP	P	2001-01-01	2014-12-31
ICAHN ENTERPRISE LP	P	2001-01-01	2014-12-31

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
8,556,175		8,847,612	-291,437
1,356,225			1,356,225
656,872		527,152	129,720
3,188,617		2,848,879	339,738
183,408		81,549	101,859
3,589			3,589
		351	-351
11,066			11,066
		148	-148
3,682			3,682

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-291,437
			1,356,225
			129,720
			339,738
			101,859
			3,589
			-351
			11,066
			-148
			3,682

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
ROYCE 100 FUND	P	2001-01-01	2014-12-31
ROYCE DISCOVERY FUND	P	2001-01-01	2014-12-31
ROYCE INSTITUTIONAL FUND	P	2001-01-01	2014-12-31
TARGA RESOURCE	P	2001-01-01	2014-12-31
WILLIAMS PARTNERS LP	P	2001-01-01	2014-12-31
WESTBURY INVESTMENT PARTNERS LP	P	2001-01-01	2014-12-31


Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
330,754			330,754
50,868			50,868
874,549			874,549
		267	-267
		12	-12
252			252


Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			330,754
			50,868
			874,549
			-267
			-12
			252


Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
YESHIVA UNIVERSITY 500 W 185TH ST NEWYORK,NY 10033	NONE	501 (C)(3)	GENERAL PURPOSE	150,000
FRIENDS OF MT VERNON 3200 MOUNT VERNON MEMORIAL HIGHWAY MOUNT VERNON,NY 22121	NONE	501 (C)(3)	GENERAL PURPOSE	5,000
FRENCH HERITAGE SOCIETY 14 E 60TH ST 605 NEWYORK,NY 10022	NONE	501 (C)(3)	GENERAL PURPOSE	5,000
CENTRAL PARK CONVSERVANCY 14 EAST 60TH STREET NEY YORK,NY 10022	NONE	501 (C)(3)	GENERAL PURPOSE	5,000
SPROUT CREEK FARM 34 LAUER ROAD POUGHKEEPSIE,NY 12603	NONE	501 (C)(3)	GENERAL PURPOSE	55,000
AMERICAN FRIENDS OF SHANGHAI MUSEUM 530 E 86TH ST NEWYORK,NY 10028	NONE	501 (C)(3)	GENERAL PURPOSE	10,000
CENTRAL PARK CONVSERVANCY 14 E 60TH ST 605 NEY YORK,NY 10022	NONE	501 (C)(3)	GENERAL PURPOSE	5,000
FRIENDS OF ARCADIA 440 COTTAGE STREET BAR HARBOR,ME 04609	NONE	501 (C)(3)	GENERAL PURPOSE	1,000
HARVARD UNIVERSITY 32 QUINCY STREET CAMBRIDGE,MA 02138	NONE	501 (C)(3)	GENERAL PURPOSE	10,000
ASIA SOCIETY 725 PARK AVE NEWYORK,NY 10021	NONE	501 (C)(3)	GENERAL PURPOSE	2,500
NEUBERGER MUSEUM OF ART 735 ANDERSON HILL RD PURCHASE,NY 10577	NONE	501 (C)(3)	GENERAL PURPOSE	2,500
BOYS CLUB OF NY 287 EAST 10TH STREET NEWYORK,NY 10009	NONE	501 (C)(3)	GENERAL PURPOSE	10,000
BOYS CLUB OF NY 287 EAST 10TH STREET NEWYORK,NY 10009	NONE	501 (C)(3)	GENERAL PURPOSE	10,000
THE GILDER LEHRMAN INSTITUTE OF AMERICAN HISTORY 49 W 45TH ST NEWYORK,NY 10036	NONE	501 (C)(3)	GENERAL PURPOSE	1,000
KENTS HILL SCHOOL PO BOX 257 KENTS HILL,ME 04349	NONE	501 (C)(3)	GENERAL PURPOSE	60,000
Total  3a				1,923,963


Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
KENTS HILL SCHOOL PO BOX 257 KENTS HILL,ME 04349	NONE	501 (C) (3)	GENERAL PURPOSE	10,000
MOUNT VERNON LADIES ASSOCIATION 3200 MOUNT VERNON MEMORIAL HWY ALEXANDRIA,VA 22309	NONE	501 (C) (3)	GENERAL PURPOSE	5,000
CENTRAL PARK CONVSEVANCY 14 E 60TH ST 605 NEW YORK,NY 10022	NONE	501 (C) (3)	GENERAL PURPOSE	12,000
YALE UNIVERSITY NEW HAVEN NEW HAVEN,CT 06520	NONE	501 (C) (3)	GENERAL PURPOSE	20,000
MAINE COMMUNITY FOUNDATION 245 MAIN ST ELLSWORTH,ME 04605	NONE	501 (C) (3)	GENERAL PURPOSE	500
HARVARD UNIVERSITY 32 QUINCY STREET CAMBRIDGE,MA 06830	NONE	501 (C) (3)	GENERAL PURPOSE	500
CATSKILL MOUNTAINKEEPER 47 MAIN ST LIVINGSTON MANOR,NY 12758	NONE	501 (C) (3)	GENERAL PURPOSE	10,000
DOING ART TOGETHER 127 W 127TH ST 107 NEW YORK,NY 10027	NONE	501 (C) (3)	GENERAL PURPOSE	25,000
POLICE ATHLETIC LEAGUE 35 HAYESTOWN RD DANBURY,CT 06811	NONE	501 (C) (3)	GENERAL PURPOSE	2,500
NAVAL WAR COLLEGE FOUNDATION LUCE HALL 686 CUSHING RD NEWPORT,RI 02841	NONE	501 (C) (3)	GENERAL PURPOSE	500
NORTHEAST HARBOR LIBRARY 1 JOY RD NORTHEAST HARBOR,ME 04662	NONE	501 (C) (3)	GENERAL PURPOSE	1,000
NEW YORK BOTANICAL GARDEN 200 BEDFORD PARK BLVD BRONX,NY 10458	NONE	501 (C) (3)	GENERAL PURPOSE	3,500
FRENCH AMERICAN AID FOR CHILDREN 150 E 58TH ST 2310 NEW YORK,NY 10155	NONE	501 (C) (3)	GENERAL PURPOSE	1,000
COALITION FOR SECURE DRIVERS LICENSE 1300 PENNSYLVANIA AVE NW WASHINGTON,DC 20004	NONE	501 (C) (3)	GENERAL PURPOSE	5,000
LINCOLN CENTER THEATRE 10 LINCOLN CENTER PLAZA NEW YORK,NY 10023	NONE	501 (C) (3)	GENERAL PURPOSE	15,000
Total  3a				1,923,963


Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
MOUNT DESERT HISTORICAL SOCIETY PO BOX 653 MOUNT DESERT, ME 04660	NONE	501 (C) (3)	GENERAL PURPOSE	1,000
MOUNT DESERT ISLAND HOSPITAL 10 WAYMAN LN BAR HARBOR, ME 04609	NONE	501 (C) (3)	GENERAL PURPOSE	25,000
HARVARD BUSINESS SCHOOL 32 QUINCY STREET CAMBRIDGE, MA 02138	NONE	501 (C) (3)	GENERAL PURPOSE	1,000
HARVARD UNIVERSITY 32 QUINCY STREET CAMBRIDGE, MA 02138	NONE	501 (C) (3)	GENERAL PURPOSE	600
ST VINCENT'S UROLOGY RESEARCH FUND 3 KEANE CT RYE, NY 10580	NONE	501 (C) (3)	GENERAL PURPOSE	25,000
NEW YORK BOTANICAL GARDEN 200 BEDFORD PARK BLVD BRONX, NY 10458	NONE	501 (C) (3)	GENERAL PURPOSE	3,000
MANHATTANVILLE COLLEGE 2900 PURCHASE ST PURCHASE, NY 10577	NONE	501 (C) (3)	GENERAL PURPOSE	5,000
MUSEUM OF MODERN ART 11 W 53RD ST NEW YORK, NY 10019	NONE	501 (C) (3)	GENERAL PURPOSE	1,200
AMERICAN MUSEUM OF NATURAL HISTORY CENTRAL PARK WEST 79TH ST NEW YORK, NY 10024	NONE	501 (C) (3)	GENERAL PURPOSE	3,500
LINCOLN CENTER THEATRE 10 LINCOLN CENTER PLAZA NEW YORK, NY 10023	NONE	501 (C) (3)	GENERAL PURPOSE	5,000
HARVARD UNIVERSITY 32 QUINCY STREET CAMBRIDGE, MA 02138	NONE	501 (C) (3)	GENERAL PURPOSE	10,000
GARDEN CLUB OF MOUNT DESERT POST OFFICE BOX 813 NORTHEAST HARBOR, ME 04662	NONE	501 (C) (3)	GENERAL PURPOSE	1,000
RIPPLE EFFECT 3600 GASTON AVENUE DALLAS, TX 75246	NONE	501 (C) (3)	GENERAL PURPOSE	2,500
INSTITUTE FOR CIVIC LEADERSHIP 45-10 94TH ST NEW YORK, NY 11373	NONE	501 (C) (3)	GENERAL PURPOSE	2,500
SAIL MAINE 58 FORE STREET PORTLAND, ME 04104	NONE	501 (C) (3)	GENERAL PURPOSE	20,000
Total  3a				1,923,963


Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
NEW YORK HISTORICAL SOCIETY 170 CENTRAL PARK WEST NEW YORK, NY 10024	NONE	501 (C) (3)	GENERAL PURPOSE	2,000
TRUSTEES OF COLUMBIA UNIVERSITY 535 W 116TH ST NEW YORK, NY 10027	NONE	501 (C) (3)	GENERAL PURPOSE	1,000
FRENCHMAN BAY CONSERVANCY 71 TIDAL FALLS RD HANCOCK, ME 04640	NONE	501 (C) (3)	GENERAL PURPOSE	5,000
FOXCROFT SCHOOL 22407 FOXHOUND LN MIDDLEBURG, VA 20117	NONE	501 (C) (3)	GENERAL PURPOSE	25,000
WORLD MONUMENT FUND EMPIRE STATE BUILDING 350 5TH AVE 2412 NEW YORK, NY 10001	NONE	501 (C) (3)	GENERAL PURPOSE	5,000
NEW YORK HISTORICAL SOCIETY 170 CENTRAL PARK WEST NEW YORK, NY 10024	NONE	501 (C) (3)	GENERAL PURPOSE	2,000
TRUST FOR THE NATIONAL MALL 1300 PENNSYLVANIA AVENUE NW WASHINGTON, DC 20004	NONE	501 (C) (3)	GENERAL PURPOSE	10,000
NEW YORK HISTORICAL SOCIETY 170 CENTRAL PARK WEST NEW YORK, NY 10024	NONE	501 (C) (3)	GENERAL PURPOSE	5,000
TREK MEDICS INTERNATIONAL INC 375 SOUTH END AVE 35R NEW YORK, NY 10280	NONE	501 (C) (3)	GENERAL PURPOSE	35,000
TWO EAST SIXTY SECOND ST FOUNDATION 2 E 62ND ST NEW YORK, NY 10021	NONE	501 (C) (3)	GENERAL PURPOSE	10,000
THE FRANKLIN AND ELEANOR ROOSEVELT INSTITUTE 570 LEXINGTON AVE 501 NEW YORK, NY 10022	NONE	501 (C) (3)	GENERAL PURPOSE	5,000
PETITIE PLAISANCE CONSERVATION FUND PO BOX 368 65 HIGH RIDGE ROAD NORTHEAST HARBOR, ME 04662	NONE	501 (C) (3)	GENERAL PURPOSE	5,000
ROUND HILL FIRE DEPARTMENT 4 MAIN ST ROUND HILL, VA 20141	NONE	501 (C) (3)	GENERAL PURPOSE	1,000
TRUSTEES OF COLUMBIA UNIVERSITY 535 E 70TH ST NEW YORK, NY 10027	NONE	501 (C) (3)	GENERAL PURPOSE	1,000
METROPOLITAN MUSEUM OF ART 1000 5TH AVE NEW YORK, NY 10028	NONE	501 (C) (3)	GENERAL PURPOSE	10,000
Total  3a				1,923,963


Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ABILITY BEYOND DISABILITY ABILITY BEYOND 4 BERKSHIRE BLVD BETHEL,CT 06801	NONE	501 (C) (3)	GENERAL PURPOSE	1,000
COLLEGE OF THE ATLANTIC 105 EDEN ST BAR HARBOR,ME 04609	NONE	501 (C) (3)	GENERAL PURPOSE	5,000
NEWYORK BOTANICAL GARDEN 200 BEDFORD PARK BLVD BRONX,NY 10458	NONE	501 (C) (3)	GENERAL PURPOSE	100,000
SILVER SHIELD ASSOCIATION INC 11 HAVEMEYER PL GREENWICH,CT 06830	NONE	501 (C) (3)	GENERAL PURPOSE	5,000
MANHATTANVILLE COLLEGE 2900 PURCHASE ST PURCHASE,NY 10577	NONE	501 (C) (3)	GENERAL PURPOSE	12,500
YALE UNIVERSITY NEW HAVEN NEW HAVEN,CT 06520	NONE	501 (C) (3)	GENERAL PURPOSE	20,000
HARVARD UNIVERSITY 32 QUINCY STREET CAMBRIDGE,MA 02138	NONE	501 (C) (3)	GENERAL PURPOSE	60,000
AMERICAN FRIENDS OF BLERANCOURT 20 WEST 44TH ST ROOM 506 NEW YORK,NY 10036	NONE	501 (C) (3)	GENERAL PURPOSE	5,000
FAMILY CENTERS 40 ARCH STREET GREENWICH,CT 06830	NONE	501 (C) (3)	GENERAL PURPOSE	4,000
BOYS CLUB OF NY 287 EAST 10TH STREET NEW YORK,NY 10009	NONE	501 (C) (3)	GENERAL PURPOSE	158
FAMILY CENTERS 40 ARCH STREET GREENWICH,CT 06830	NONE	501 (C) (3)	GENERAL PURPOSE	12,000
BEATRIX FERRAND SOCIETY PO BOX 11 MOUNT DESERT,ME 04660	NONE	501 (C) (3)	GENERAL PURPOSE	10,000
BOYS CLUB OF NY 287 EAST 10TH STREET NEW YORK,NY 10009	NONE	501 (C) (3)	GENERAL PURPOSE	7,000
BOYS CLUB OF NY 287 EAST 10TH STREET NEW YORK,NY 10009	NONE	501 (C) (3)	GENERAL PURPOSE	3,000
COLUMBIA UNIVERSITY 630 WEST 168TH STREET NEW YORK,NY 10032	NONE	501 (C) (3)	GENERAL PURPOSE	50,000
Total  3a				1,923,963


Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
PARK AVENUE PRESERVATION FOUNDATION 564 PARK AVE NEW YORK,NY 10065	NONE	501 (C) (3)	GENERAL PURPOSE	10,000
ADDISON GALLERY OF AMERICAN ART 180 MAIN ST ANDOVER,MA 01810	NONE	501 (C) (3)	GENERAL PURPOSE	5,000
MOUNT DESERT BIOLOGICAL LABORATORY 159 OLD BAR HARBOR RD BAR HARBOR,ME 04609	NONE	501 (C) (3)	GENERAL PURPOSE	2,500
STANWICH CONGREGATIONAL CHURCH 202 TACONIC RD GREENWICH,CT 06831	NONE	501 (C) (3)	GENERAL PURPOSE	25,000
NATIONAL AUDUBON SOCIETY INC 225 VARICK ST NEW YORK,NY 10014	NONE	501 (C) (3)	GENERAL PURPOSE	1,000
RYE COUNTRY DAY SCHOOL 3 CEDAR ST RYE,NY 10580	NONE	501 (C) (3)	GENERAL PURPOSE	5,000
HISTORIC NEIGHBORHOOD PRES PROGRAM ADDRESS 65 HIGH RIDGE ROAD STAMFORD,CT 06905	NONE	501 (C) (3)	GENERAL PURPOSE	5,000
NEW YORK BOTANICAL GARDEN 200 BEDFORD PARK BLVD BRONX,NY 10458	NONE	501 (C) (3)	GENERAL PURPOSE	250,000
SPROUT CREEK FARM 34 LAUER ROAD POUGHKEEPSIE,NY 12603	NONE	501 (C) (3)	GENERAL PURPOSE	27,000
FRICK COLLECTION 1 EAST 70TH STREET NEW YORK,NY 10021	NONE	501 (C) (3)	GENERAL PURPOSE	5,000
AMERICAN FRIENDS OF BLERANCOURT 20 WEST 44TH ST ROOM 506 NEW YORK,NY 10036	NONE	501 (C) (3)	GENERAL PURPOSE	3,000
NEW YORK LANDMARKS CONSERVANCY INC 1 WHITEHALL ST 21 NEW YORK,NY 10004	NONE	501 (C) (3)	GENERAL PURPOSE	1,000
FRICK COLLECTION 1 EAST 70TH STREET NEW YORK,NY 10021	NONE	501 (C) (3)	GENERAL PURPOSE	30,000
HARVARD ART MUSEUM 32 QUINCY STREET CAMBRIDGE,MA 02138	NONE	501 (C) (3)	GENERAL PURPOSE	1,000
SAIL MAINE 58 FORE STREET PORTLAND,ME 04104	NONE	501 (C) (3)	GENERAL PURPOSE	20,000
Total  3a				1,923,963


Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
FALMOUTH HIGH SCHOOL 874 GIFFORD ST EAST FALMOUTH,MA 02536	NONE	501 (C) (3)	GENERAL PURPOSE	2,500
THE LIFELIGHT FOUNDATION 3558 SOUTH JEFFERSON ST LOUIS,MO 63118	NONE	501 (C) (3)	GENERAL PURPOSE	2,500
MOUNT DESERT CHAMBER MUSIC 1 KIMBALL RD NORTHEAST HARBOR,ME 04662	NONE	501 (C) (3)	GENERAL PURPOSE	10,000
FRICK COLLECTION 1 EAST 70TH STREET NEWYORK,NY 10021	NONE	501 (C) (3)	GENERAL PURPOSE	5,000
ARCHIVES OF AMERICAN ART 300 PARK AVE S 300 NEWYORK,NY 10010	NONE	501 (C) (3)	GENERAL PURPOSE	3,000
SEAL HARBOR VILLAGE IMPROVEMENT PO BOX 171 SEAL HARBOR,ME 04675	NONE	501 (C) (3)	GENERAL PURPOSE	500
GARDEN CONSERVANCY PO BOX 219 COLD SPRING,NY 10516	NONE	501 (C) (3)	GENERAL PURPOSE	10,000
FRIENDS OF ACADIA 43 COTTAGE ST BAR HARBOR,ME 04609	NONE	501 (C) (3)	GENERAL PURPOSE	500
JAMES MARSTON FITCH CHARITABLE FOUNDATION 232 EAST 11TH STREET NEWYORK,NY 10003	NONE	501 (C) (3)	GENERAL PURPOSE	35,000
HORTICULTURAL SOCIETY OF NY 13 148 W 37TH ST NEWYORK,NY 10018	NONE	501 (C) (3)	GENERAL PURPOSE	2,000
HARVARD ART MUSEUM 32 QUINCY STREET CAMBRIDGE,MA 02138	NONE	501 (C) (3)	GENERAL PURPOSE	50,000
ISLAND HOUSING TRUST 346 STATE RD VINEYARD HAVEN,MA 02568	NONE	501 (C) (3)	GENERAL PURPOSE	5,000
GARDEN CONSERVANCY PO BOX 219 COLD SPRING,NY 10516	NONE	501 (C) (3)	GENERAL PURPOSE	500
ENGLISH SPEAKING UNION 144 E 39TH ST NEWYORK,NY 10016	NONE	501 (C) (3)	GENERAL PURPOSE	600
HALCYON FOUNDATION 555 5TH AVE NEWYORK,NY 10017	NONE	501 (C) (3)	GENERAL PURPOSE	10,000
Total  3a				1,923,963


Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
CATSKILL MOUNTAINKEEPER 47 MAIN ST LIVINGSTON MANOR,NY 12758	NONE	501 (C) (3)	GENERAL PURPOSE	50,000
CENTRAL PARK CONVSEVANCY 14 E 60TH ST 605 NEWYORK,NY 10022	NONE	501 (C) (3)	GENERAL PURPOSE	500
NEWYORK LANDMARKS CONSERVANCY INC 1 WHITEHALL ST 21 NEWYORK,NY 10004	NONE	501 (C) (3)	GENERAL PURPOSE	2,000
NEXT STEP PO BOX 1466 ELLSWORTH,ME 04605	NONE	501 (C) (3)	GENERAL PURPOSE	500
HARVARD UNIVERSITY 32 QUINCY STREET CAMBRIDGE,MA 02138	NONE	501 (C) (3)	GENERAL PURPOSE	10,000
CITY CLUB OF NEWYORK 249 W 34TH STREET 402 NEWYORK,NY 10001	NONE	501 (C) (3)	GENERAL PURPOSE	250
ARCHIVES OF AMERICAN ART 300 PARK AVE S 300 NEWYORK,NY 10010	NONE	501 (C) (3)	GENERAL PURPOSE	6,000
SPACE GALLERY 538 CONGRESS ST PORTLAND,ME 04101	NONE	501 (C) (3)	GENERAL PURPOSE	20,000
RIPPLE EFFECT 3600 GASTON AVENUE DALLAS,TX 75246	NONE	501 (C) (3)	GENERAL PURPOSE	2,500
PORTLAND MUSEUM OF ART 7 CONGRESS ST PORTLAND,ME 04101	NONE	501 (C) (3)	GENERAL PURPOSE	2,500
ARCHIVES OF AMERICAN ART 300 PARK AVE S 300 NEWYORK,NY 10010	NONE	501 (C) (3)	GENERAL PURPOSE	7,000
YALE CHIEF EXECUTIVE LEADERSHIP INSTITUTE NEW HAVEN NEW HAVEN,CT 06520	NONE	501 (C) (3)	GENERAL PURPOSE	4,500
HOPE FOR DEPRESSION RESEARCH FOUNDATION 40 W 5TH ST 1440 NEWYORK,NY 10019	NONE	501 (C) (3)	GENERAL PURPOSE	5,000
WNET 825 EIGHT AVE NEWYORK,NY 10019	NONE	501 (C) (3)	GENERAL PURPOSE	5,000
HARVARD MUSEUM OF NATURAL HISTORY 32 QUINCY STREET CAMBRIDGE,MA 02138	NONE	501 (C) (3)	GENERAL PURPOSE	500
Total  3a				1,923,963

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ROLLINS COLLEGE 1000 HOLT AVE WINTER PARK,FL 32789	NONE	501 (C) (3)	GENERAL PURPOSE	50,000
HALCYON FOUNDATION 555 5TH AVE NEW YORK,NY 10017	NONE	501 (C) (3)	GENERAL PURPOSE	2,500
SPROUT CREEK FARM 34 LAUER ROAD POUGHKEEPSIE,NY 12603	NONE	501 (C) (3)	GENERAL PURPOSE	50,000
NATURAL RESOURCES DEFENSE FUND 40 W 20TH ST NEW YORK,NY 10011	NONE	501 (C) (3)	GENERAL PURPOSE	10,000
METROPOLITAN MUSEUM OF ART 1000 5TH AVE NEW YORK,NY 10028	NONE	501 (C) (3)	GENERAL PURPOSE	10,000
CHRIST CHURCH GREENWICH 254 E PUTNAM AVE GREENWICH,CT 06830	NONE	501 (C) (3)	GENERAL PURPOSE	25,000
CENTRAL PARK CONVSERVANCY 14 E 60TH ST 605 NEW YORK,NY 10022	NONE	501 (C) (3)	GENERAL PURPOSE	5,000
CENTRAL PARK CONVSERVANCY CENTRAL PARK WEST 79TH ST NEW YORK,NY 10022	NONE	501 (C) (3)	GENERAL PURPOSE	2,500
LIBRARY OF AMERICAN LANDSCAPE HISTORY 150 FEARING ST 25 AMHERST,MA 01002	NONE	501 (C) (3)	GENERAL PURPOSE	1,000
FRIENDS OF THE UPPER EAST SIDE HISTORIC 966 LEXINGTON AVE 35 NEW YORK,NY 10021	NONE	501 (C) (3)	GENERAL PURPOSE	2,500
JOHN JAY COLLEGE 841 10TH AVE NEW YORK,NY 10019	NONE	501 (C) (3)	GENERAL PURPOSE	1,000
ARCHIVES OF AMERICAN ART 300 PARK AVE S 300 NEW YORK,NY 10010	NONE	501 (C) (3)	GENERAL PURPOSE	7,500
NATURAL RESOURCES DEFENSE FUND 40 W 20TH ST NEW YORK,NY 10011	NONE	501 (C) (3)	GENERAL PURPOSE	23,250
GLENVILLE VOLUNTEER FIRE CO INC 266 GLENVILLE RD GREENWICH,CT 06831	NONE	501 (C) (3)	GENERAL PURPOSE	500
HALCYON FOUNDATION 555 5TH AVE NEW YORK,NY 10017	NONE	501 (C) (3)	GENERAL PURPOSE	10,000
Total  3a				1,923,963

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
INTERNATIONAL DEBUTANTE BALL FOUNDATION INC 336 EAST 69TH STREET NEW YORK,NY 10021	NONE	501 (C) (3)	GENERAL PURPOSE	1,000
BOYS CLUB OF NY 287 EAST 10TH STREET NEW YORK,NY 10009	NONE	501 (C) (3)	GENERAL PURPOSE	100,000
HALCYON FOUNDATION 555 5TH AVE NEW YORK,NY 10017	NONE	501 (C) (3)	GENERAL PURPOSE	1,000
SOCIETY OF ARCHITECTURAL HISTORIANS 1365 N ASTOR STREET CHICAGO,IL 60610	NONE	501 (C) (3)	GENERAL PURPOSE	405
NEW YORK BOTANICAL GARDEN 200 BEDFORD PARK BLVD BRONX,NY 10458	NONE	501 (C) (3)	GENERAL PURPOSE	10,000
ROUND HILL ASSOCIATION PO BOX 7424 GREENWICH,CT 06831	NONE	501 (C) (3)	GENERAL PURPOSE	500
Total  3a				1,923,963

TY 2014 Accounting Fees Schedule

Name: THE WIDGEON POINT CHARITABLE FOUNDATION

F/K/A THE BEINECKE FOUNDATION INC

EIN: 13-6201175

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING AND BOOKKEEPING	160,000	80,000		80,000

TY 2014 All Other Program

Related Investments Schedule

Name: THE WIDGEON POINT CHARITABLE FOUNDATION
F/K/A THE BEINECKE FOUNDATION INC

EIN: 13-6201175

Category	Amount
NONE	0

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2014 Depreciation Schedule

Name: THE WIDGEON POINT CHARITABLE FOUNDATION
F/K/A THE BEINECKE FOUNDATION INC

EIN: 13-6201175

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
COMPUTERS & EQUIPMENT	2013-01-01	17,717	3,543	SL	5 000000000000	3,543	0		
FURNITURE	2014-12-18	3,785		SL	5 000000000000	0	0		
COMPUTER	2014-10-19	5,164		SL	5 000000000000	172	0		
CARPET RESTORATION	2014-04-02	18,631		SL	27 500000000000	508	0		

TY 2014 Investments - Other Schedule

Name: THE WIDGEON POINT CHARITABLE FOUNDATION
F/K/A THE BEINECKE FOUNDATION INC

EIN: 13-6201175

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
WP CAREY & CO-REIT IN FIDELITY	AT COST	63,514	105,150
MORGAN STANLEY #0904	AT COST	3,920,869	5,425,281
WILLIAM PARTNERS LP	AT COST	26,226	134,250
TARGA RESOURCES PARTNERS LP	AT COST	5,934	430,920
ONEOK PARTNERS LP	AT COST	549	158,520
NUSTAR ENERGY PARTNERS LP	AT COST	0	0
ENTERPRISE PRODUCTS PARTNERS	AT COST	73,934	577,920
FIDELITY #0156	AT COST	934,254	1,213,709
BNY MELLON #6830	AT COST	21,399,788	26,799,278
ROYCE DISCOVERY FUND	AT COST	2,565,090	2,565,090
ROYCE INSTITUTIONAL LLC	AT COST	9,556,778	9,556,778
ROYCE 100 FUND	AT COST	3,098,731	3,098,731
KKR & CO	AT COST	169,947	162,470
ICAHN PARTNERS LP	AT COST	20,586	20,343
BLACKSTONE GROUP LP	AT COST	131,235	135,320

TY 2014 Land, Etc. Schedule

Name: THE WIDGEON POINT CHARITABLE FOUNDATION
F/K/A THE BEINECKE FOUNDATION INC

EIN: 13-6201175

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
COMPUTERS & EQUIPMENT	17,717	7,086	10,631	
FURNITURE	3,785	0	3,785	
COMPUTER	5,164	172	4,992	
CARPET RESTORATION	18,631	508	18,123	

TY 2014 Other Assets Schedule

Name: THE WIDGEON POINT CHARITABLE FOUNDATION
F/K/A THE BEINECKE FOUNDATION INC

EIN: 13-6201175

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
DEPOSITS AND DEFERRED PAYMENTS	5,125	5,125	5,125

TY 2014 Other Decreases Schedule

Name: THE WIDGEON POINT CHARITABLE FOUNDATION
F/K/A THE BEINECKE FOUNDATION INC

EIN: 13-6201175

Description	Amount
UNREALIZED GAINS/LOSSES AND BOOK TO TAX DIFFERENCES	1,221,367
ORDINARY LOSS FROM WESTBURY INVESTMENT PTR LP TRADE OR BUSINESS A UBIT ITEM	100,380

TY 2014 Other Expenses Schedule

Name: THE WIDGEON POINT CHARITABLE FOUNDATION

F/K/A THE BEINECKE FOUNDATION INC

EIN: 13-6201175

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INSURANCE	258,105	110,442		165,663
INVESTMENT ADVISORY FEES	84,659	84,659		0
OFFICE UTILITIES	4,149	2,075		2,074
TELEPHONE INTERNET & COMPUTER EXPENSE	22,265	11,133		11,132
OFFICE EXPENSE	46,843	23,422		23,421
PORTFOLIO DEDUCTIONS- PARTNERSHIPS	289,601	289,601		0
MEMBERSHIPS AND ORGANIZATIONS	1,225	613		612
POSTAGE	7,059	3,530		3,529
DUES & SUBSCRIPTIONS	4,443	2,222		2,221
FILING FEES	2,149	1,075		1,074
ADP PAYROLL FEES	2,180	1,090		1,090

TY 2014 Other Income Schedule

Name: THE WIDGEON POINT CHARITABLE FOUNDATION
F/K/A THE BEINECKE FOUNDATION INC

EIN: 13-6201175

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
PARTNERSHIP INCOME FROM MLPS	11,865	11,865	11,865
ROYCE TECH VALUE FUND CLASS ACTION SETTLEMENT	3,710	3,710	3,710

TY 2014 Other Liabilities Schedule

Name: THE WIDGEON POINT CHARITABLE FOUNDATION
F/K/A THE BEINECKE FOUNDATION INC

EIN: 13-6201175

Description	Beginning of Year - Book Value	End of Year - Book Value
AMERICAN EXPRESS	7,646	0
OVERDRAFT-MSSB #7670	2,910	8,520
NEGATIVE CAPITAL ON KINDER MORGAN ENERGY PTRS K-1	63,812	0
DUE TO MORGAN STANLEY #0904 FOR UNSETTLED PURCHASE OF GILEAD SCIENCES	0	48,419

TY 2014 Other Professional Fees Schedule**Name:** THE WIDGEON POINT CHARITABLE FOUNDATION

F/K/A THE BEINECKE FOUNDATION INC

EIN: 13-6201175

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CONSULTING-SPECIAL MATTERS	61,772	30,886		30,886

TY 2014 Taxes Schedule

Name: THE WIDGEON POINT CHARITABLE FOUNDATION
F/K/A THE BEINECKE FOUNDATION INC

EIN: 13-6201175

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
NYS UNEMPLOYMENT TAX	1,082	433		649
PAYROLL TAX	34,766	16,341		18,425
FOREIGN TAXES PAID	3,452	0		0