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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 ROBERT & DALE ROSEN CHARITABLE FOUNDATION TR U/A 8/05/92		A Employer identification number 13-6997530	
Number and street (or P O box number if mail is not delivered to street address) 67 PECKSLAND ROAD		B Telephone number (see instructions) (203) 625-3165	
City or town, state or province, country, and ZIP or foreign postal code GREENWICH, CT 06831		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16)▶\$ 173,943		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</i>		(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)	43,696			
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities.	1,655	1,655		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	51,712			
	b Gross sales price for all assets on line 6a 121,210				
	7 Capital gain net income (from Part IV, line 2) . . .		92,851		
	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)				
	12 Total. Add lines 1 through 11	97,063	94,506		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	3,850	3,850		0
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	30	30		0
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	1,722	1,722		0
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	5,602	5,602		0
	25 Contributions, gifts, grants paid	107,865			107,865
	26 Total expenses and disbursements. Add lines 24 and 25	113,467	5,602		107,865
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-16,404			
	b Net investment income (if negative, enter -0-)		88,904		
	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		9,393	9,393
	2	Savings and temporary cash investments	3,158	418	418
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	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			
	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)	118,778	89,126	157,537
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)	0	6,595	6,595	
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	121,936	105,532	173,943	
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 ▶ _____)			
	23	Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.				
	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	208,988	208,988	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	-87,052	-103,456	
	30	Total net assets or fund balances (see instructions)	121,936	105,532	
31	Total liabilities and net assets/fund balances (see instructions) . . .	121,936	105,532		

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)	1 121,936
2	Enter amount from Part I, line 27a	2 -16,404
3	Other increases not included in line 2 (itemize) ▶ _____	3 0
4	Add lines 1, 2, and 3	4 105,532
5	Decreases not included in line 2 (itemize) ▶ _____	5 0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6 105,532

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) 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	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a See Additional Data Table			
b			
c			
d			
e			

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	92,851
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	}	3	

Part V

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

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

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

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

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

1 Enter the appropriate amount in each column for each year, see 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	70,058	220,299	0 318013
2012	61,388	148,558	0 413226
2011	217,776	199,666	1 090701
2010	85,690	253,337	0 338245
2009	161,863	230,733	0 701516

2	Total of line 1, column (d).	2	2 861701
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 572340
4	Enter the net value of noncharitable-use assets for 2014 from Part X, line 5.	4	182,355
5	Multiply line 4 by line 3.	5	104,369
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	889
7	Add lines 5 and 6.	7	105,258
8	Enter qualifying distributions from Part XII, line 4.	8	107,865

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 ☐ and enter "N/A" on line 1			
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		1889	
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-)		20	
3		Add lines 1 and 2.		3889	
4		Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		40	
5		Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5889	
6		Credits/Payments			
a		2014 estimated tax payments and 2013 overpayment credited to 2014		6a	863
b		Exempt foreign organizations—tax withheld at source		6b	
c		Tax paid with application for extension of time to file (Form 8868)		6c	2,000
d		Backup withholding erroneously withheld		6d	
7		Total credits and payments. Add lines 6a through 6d.		7	2,863
8		Enter any penalty for underpayment of estimated tax. Check here ☐ 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	1,974
11		Enter the amount of line 10 to be Credited to 2015 estimated tax ☒ 1,974 Refunded ☐		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		No
b		Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)?		1b		No
		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.				
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 ☒ \$ 0 (2) On foundation managers ☒ \$ 0				
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		No
		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		No
4a		Did the foundation have unrelated business gross income of \$1,000 or more during the year?		4a		No
b		If "Yes," has it filed a tax return on Form 990-T for this year?		4b		
5		Was there a liquidation, termination, dissolution, or substantial contraction during the year?		5		No
		If "Yes," attach the statement required by General Instruction T.				
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? If "Yes," complete Part II, col. (c), and Part XV.		7	Yes	
8a		Enter the states to which the foundation reports or with which it is registered (see instructions) ☒ CT				
b		If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .		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)? If "Yes," complete Part XIV		9		No
10		Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses.		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 TAXPAYER Telephone no (203) 625-3165 Located at 67 PECKSLAND ROAD GREENWICH CT ZIP+4 06831			
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

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

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

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation (see 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
ROBERT L ROSEN	TRUSTEE	0	0	0
67 PECKSLAND ROAD GREENWICH, CT 06831	0 50			
DALE A ROSEN	TRUSTEE	0	0	0
67 PECKSLAND ROAD GREENWICH, CT 06831	0 50			
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
NONE				
Total number of other employees paid over \$50,000.				0

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
NONE		
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	
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	
2	
All other program-related investments. See instructions.	
3	
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	179,085
b	Average of monthly cash balances.	1b	6,047
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	185,132
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	185,132
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	2,777
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	182,355
6	Minimum investment return. Enter 5% of line 5.	6	9,118

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	9,118
2a	Tax on investment income for 2014 from Part VI, line 5.	2a	889
b	Income tax for 2014 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	889
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	8,229
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	8,229
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	8,229

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	107,865
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	107,865
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	889
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	106,976

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				8,229
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.	150,346			
b From 2010.	73,439			
c From 2011.	209,825			
d From 2012.	55,017			
e From 2013.	59,508			
f Total of lines 3a through e.	548,135			
4 Qualifying distributions for 2014 from Part XII, line 4 ▶ \$ 107,865				
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.				8,229
e Remaining amount distributed out of corpus	99,636			
5 Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	647,771			
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). . .	150,346			
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a	497,425			
10 Analysis of line 9				
a Excess from 2010. . . .	73,439			
b Excess from 2011. . . .	209,825			
c Excess from 2012. . . .	55,017			
d Excess from 2013. . . .	59,508			
e Excess from 2014. . . .	99,636			

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)

	Tax year	Prior 3 years			(e) Total
	(a) 2014	(b) 2013	(c) 2012	(d) 2011	
2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed				
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))

See Additional Data Table

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 email address of the person to whom applications should be addressed

b

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

c

Any submission deadlines

d

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

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	107,865
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)

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?

(1) Cash.

(2) Other assets.

- (1)** Sales of assets to a noncharitable exempt organization.
- (2)** Purchases of assets from a noncharitable exempt organization.
- (3)** Rental of facilities, equipment, or other assets.
- (4)** Reimbursement arrangements.
- (5)** Loans or loan guarantees.
- (6)** Performance of services or membership or fundraising solicitations.

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.

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

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

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.

***** 2015-11-05 *****

Signature of officer or trustee Date Title

May the IRS discuss this return with the preparer shown below (see instr)? ☒ Yes ☐ No

Print/Type preparer's name ALAN G BADEY CPA	Preparer's Signature	Date	Check if self-employed ☒	PTIN P00666263
Firm's name ☒ CITRIN COOPERMAN & COMPANY LLP			Firm's EIN ☒ 22-2428965	
Firm's address ☒ 709 WESTCHESTER AVENUE WHITE PLAINS, NY 10604			Phone no (914) 949-2990	

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)
100 SH REGENERON PHARMACEUTICALS INC		2012-10-02	2014-12-31
245 SH EOG RES INC		2012-09-19	2014-12-31
70 SH GILEAD SCIENCES INC		2014-11-20	2014-12-31
200 SH DISCOVERY COMM SER A		2012-09-19	2014-12-31
200 SH YUM BRANDS INC		2006-12-18	2014-12-31
15 SH IBM CORP		2001-05-11	2014-12-16
50 SH MURPHY USA INC		2000-08-31	2014-07-17
200 SH FLY LEASING LIMITED		2008-01-24	2014-08-20
25 SH ENTERPRISE PRODUCTS PARTNERS LP		2014-11-19	2014-12-03
500 SH SAPIENT CORP		2010-09-15	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)
35,390		7,837	27,553
31,276		2,500	28,776
7,191		1,274	5,917
16,122		2,900	13,222
14,692		6,366	8,326
2,310		1,060	1,250
2,376		234	2,142
2,970		3,062	-92
926		213	713
7,957		2,913	5,044

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	
			27,553
			28,776
			5,917
			13,222
			8,326
			1,250
			2,142
			-92
			713
			5,044

Form 990PF Part XV Line 1a - 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).

ROBERT L ROSEN
DALE A ROSEN

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				
AIPAC - THE AMERICAN ISRAEL PUBLIC AFFAIRS COMMITTEE 477 MADISON AVENUE NEW YORK,NY 10022	NONE	PUBLIC	TO STRENGTHEN, PROTECT AND PROMOTE THE U S - ISRAEL RELATIONSHIP IN WAYS THAT ENHANCE THE SECURITY OF ISRAEL AND THE UNITED STATES	10,000
AMERICAN CANCER SOCIETY NEW ENGLAND DIVISION INC / LOWER FAIRFIELD UNIT PO BOX 907 WALLINGFORD,CT 06492	NONE	PUBLIC	TO SUPPORT THE MISSION TO ELIMINATE CANCER	100
AMERICAN JEWISH COMMITTEE 165 E 56TH STREET NEW YORK,NY 10022	NONE	PUBLIC	TO ADVOCATE FOR THE WELL-BEING OF THE JEWISH PEOPLE AND ISRAEL, AND FOR THE ADVANCEMENT OF DEMOCRATIC VALUES AROUND THE WORLD	1,800
ANTI DEFAMATION LEAGUE 605 THIRD AVENUE NEW YORK,NY 10158	NONE	PUBLIC	TO SUPPORT THE MISSION TO STOP ANTI-SEMITISM	3,405
ARF - ANIMAL RESCUE FUND OF THE HAMPTONS 90 DANIELS HOLE ROAD WAINSCOTT,NY 11975	NONE	PUBLIC	ARF ACTIVELY RESCUES CATS AND DOGS, PROVIDES QUALITY CARE AND OFFERS SANCTUARY UNTIL LOVING HOMES CAN BE FOUND	200
BET TZEDEK - HOUSE OF JUSTICE 145 S FAIRFAX AVENUE STE 200 LOS ANGELES,CA 90036	NONE	PUBLIC	TO ASSIST INDIVIDUALS WITH LEGAL PROBLEMS	500
BREAST CANCER ALLIANCE 48 MAPLE AVENUE GREENWICH,CT 06830	NONE	PUBLIC	BREAST CANCER RESEARCH	1,000
CARDIOLOGY FOUNDATION OF NEW YORK 425 E 61ST STREET NEW YORK,NY 10065	NONE	PUBLIC	SUPPORTING THE WORK OF DR MARTIN R POST, MD	2,000
COUNCIL ON FOREIGN RELATIONS INC 58 EAST 68TH STREET NEW YORK,NY 10065	NONE	PUBLIC	TO ASSIST WITH EFFORTS TO RAISE THE LEVEL OF FOREIGN AWARENESS	3,610
GLOBAL CITIZENS INITIATIVE 73 ARCH STREET GREENWICH,CT 06830	NONE	PUBLIC	EMPOWERS OUR NEXT GENERATION OF GLOBAL CITIZEN LEADERS, CREATE A SUPPORTIVE ONLINE COMMUNITY FOR DIALOGUE ON GLOBAL ISSUES WHILE PROVIDING THEM WITH RESEARCH BASED EDUCATIONAL TOOLS	300
GREENWICH SYMPHONY 299 GREENWICH AVENUE GREENWICH,CT 06830	NONE	PUBLIC	CULTURAL INSTITUTION PROMOTING CLASSICAL MUSIC AND MUSIC EDUCATION	50
HOSPITAL FOR SPECIAL SURGERY 535 E 70TH STREE NEW YORK,NY 10021	NONE	PUBLIC	SUPPORTING DR FARMER'S RESEARCH IN ORTHOPEDIC SPINE CONDITIONS	100
INNOVATION AFRICA 520 8TH AVENUE 15TH FLOOR NEW YORK,NY 10018	NONE	PUBLIC	BRINGING ISRAELI INNOVATION TO AFRICA WITH SOLAR TECHNOLOGIES	500
JEWISH WOMEN'S FOUNDATION 130 EAST 59TH STREET NEW YORK,NY 10022	NONE	PUBLIC	SUPPORT PROGRAMS THAT ENSURE A HEALTHY AND SUPPORTIVE ENVIRONMENT	200
JUMPSTART FOR YOUNG CHILDREN 308 CONGRESS STREET 6TH FLOOR BOSTON,MA 02210	NONE	PUBLIC	HELP CHILDREN DEVELOP LANGUAGE AND LITERACY SKILLS	12,000
Total  3a				107,865

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>				
JUVENILE DIABETES RESEARCH FOUNDATION 432 PARK AVENUE SOUTH 15TH FLOOR NEW YORK,NY 10016	NONE	PUBLIC	TO FUND TYPE 1 DIABETES RESEARCH JDRF'S STATED GOAL IS TO "PROGRESSIVELY REMOVE THE IMPACT OF T1D FROM PEOPLE'S LIVES UNTIL WE ACHIEVE A WORLD WITHOUT T1D "	500
LAWYERS ON THE RUN 1779 NW 28TH ST MIAMI,FL 33142	NONE	PUBLIC	TO ASSIST THE POOR AND INDIGENT COMMUNITY IN MIAMI-DADE COUNTY FLORIDA BY CONNECTING THEM WITH ATTORNEY VOLUNTEERS	100
NAMI - NATIONAL ALLIANCE ON MENTAL ILLNESS 505 8TH AVENUE 1103 NEW YORK,NY 10018	NONE	PUBLIC	TO FUND THE NATION'S LARGEST GRASSROOTS MENTAL HEALTH ORGANIZATION DEDICATED TO BUILDING BETTER LIVES FOR THE MILLIONS OF AMERICANS AFFECTED BY MENTAL ILLNESS	100
NEW YORK PUBLIC RADIO 160 VARICK STREET NEW YORK,NY 10013	NONE	PUBLIC	TO PROVIDE A THOUGHT- PROVOKING AND SOUL- ENRICHING ARRAY OF NEWS, CURRENT AFFAIRS, MUSIC, AND CULTURAL PROGRAMMING	100
NEW YORK UNIVERSITY STERN SCHOOL OF BUSINESS 14 WASHINGTON PLACE NEW YORK,NY 10003	NONE	PUBLIC	TO EDUCATE AND DEVELOP FORWARD-THINKING GLOBAL LEADERS	25,000
OBLITERIDE PO BOX 19024 1100 FAIRVIEWAVE N LM-120 SEATTLE,WA 98109	NONE	PUBLIC	TO CONNECT CANCER SURVIVORS, CYCLISTS, AND COMMUNITY MEMBERS TO RAISE MONEY FOR CANCER RESEARCH AT THE FRED HUTCHINSON CANCER RESEARCH CENTER	250
PAWS 504 MAIN AVENUE NORWALK,CT 06851	NONE	PUBLIC	TO SUPPORT THE RESCUE OF HOMELESS ANIMALS	200
PFLAG 1828 L STREET NW SUITE 660 WASHINGTON,DC 20036	NONE	PUBLIC	TO PROMOTE THE HEALTH AND WELL-BEING OF LESBIAN, GAY, BISEXUAL, AND TRANSGENDER PERSONS, THEIR FAMILIES, AND THEIR FRIENDS THROUGH SUPPORT TO COPE WITH AN ADVERSE SOCITEY, EDUCATION TO ENLIGHTEN AN ILL- INFORMED PUBLIC, AND ADVOCACY TO END DISCRIMINATION AND TO SECURE EQUAL CIVIL RIGHTS	200
ROSIE'S THEATRE KIDS 445 W 45TH ST NEW YORK,NY 10036	NONE	PUBLIC	TO SERVE STUDENTS WHO OTHERWISE WOULD NOT HAVE THE OPPORTUNITY TO EXPERIENCE THEATER, POSITIVELY CHANGING THE TRAJECTORY OF THEIR LIVES BY PROVIDING COMPREHENSIVE CLOSSES IN MUSIC, DANCE AND DRAMA, THOUGHTFUL MENTORING, AND STRUCTURED ACADEMIC GUIDANCE	5,000
SIMON WIESENTHAL CENTER 1399 SOUTH ROXBURY DRIVE LOS ANGELES,CA 90035	NONE	PUBLIC	TO SUPPORT THE EFFORTS TO CONFRONT ANTI- SEMITISM	200
SISTERHOOD OF TEMPLE SHALOM 300 EAST PUTNAM AVENUE GREENWICH,CT 06830	NONE	PUBLIC	TO SUPPORT THE YOUTH, EDUCATION, AND SPECIAL PROJECTS	180
TEMPLE SHOLOM 300 EAST PUTNAM AVENUE GREENWICH,CT 06830	NONE	PUBLIC	SUPPORT THE TEMPLE AND ITS PROGRAMS	19,850
THE BRONX CHARTER SCHOOL FOR CHILDREN 388 WILLIS AVENUE BRONX,NY 10454	NONE	PUBLIC	TO ASSIST WITH THE ABILITY TO SUSTAIN THE SCHOOL AS WELL AS INNOVATE AND BUILD FOR THE FUTURE	100
THE CENTER FOR DISCOVERY PO BOX 840 HARRIS,NY 12742	NONE	PUBLIC	TO SUPPORT THE SERVICES TO CHILDREN AND ADULTS WITH	5,000
THE OPPORTUNITY NETWORK 381 PARK AVENUE SOUTH SUITE 1401 NEW YORK,NY 10016	NONE	PUBLIC	TO HELP CREATE OPPORTUNITES FOR HIGH- ACHIEVING, UNDERSERVED HIGH SCHOOL AND COLLEGE STUDENTS BY CREATING ACCESS FOR THEM TO CAREER OPPORTUNITIES, PROFESSIONAL NETWORKS AND COMPETITIVE COLLEGES	500
Total  3a				107,865

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>				
THE PINK AGENDA 60 EAST 56TH ST 8TH FLOOR NEW YORK,NY 10022	NONE	PUBLIC	TO FUND A NOT-FOR-PROFIT 501(C)(3) ORGANIZATION COMMITTED TO RAISING MONEY FOR BREAST CANCER RESEARCH AND CARE, AS WELL AS AWARENESS OF THE DISEASE AMONG YOUNG PROFESSIONALS	150
TURNAROUND FOR CHILDREN 25 WEST 45TH STREET 6TH FLOOR NEW YORK,NY 10036	NONE	PUBLIC	HELPING HIGH-POVERTY, LOW-PERFORMING PUBLIC SCHOOLS	500
YWCA OF GREENWICH 259 EAST PUTNAM AVENUE GREENWICH,CT 06830	NONE	PUBLIC	TO ENHANCE THE LIVES OF WOMEN, MEN, AND CHILDREN WITHA VARIETY OF PROGRAMS	895
BARK FOR LIFE OF WESTCHESTER 635 SOUTH BROADWAY TARRYTOWN,NY 10591	NONE	PUBLIC	TO RAISE FUNDS AND AWARENESS FOR THE AMERICAN CANCER SOCIETY'S FIGHT AGAINST CANCER	200
CONNECTICUT BALLET 20 ACOSTA STREET STAMFORD,CT 06902	NONE	PUBLIC	CONNECTICUT BALLET DEVELOPS FUTURE ARTISTS ND AUDIENCES THROUGH IS AFFILIATED SCHOOL	100
GUIDING EYES FOR THE BLIND 611 GRANITE SPRINGS RD YORKTOWN HEIGHTS,NY 10598	NONE	PUBLIC	GUIDING EYES FOR THE BLIND IS AN INTERNATIONALLY ACCREDITED NONPROFIT THAT PROVIDES GUIDE DOGS TOPEOPLE WITH VISION LOSS, AS WELL AS SERVICE DOGS TO CHILDREN WITH AUTISM	200
HOLIDAY AID PROGRAM (GREENWICH DEPT OF SOCIAL SERVICES) 101 FIELD POINT ROAD GREENWICH,CT 06830	NONE	PUBLIC	TO ASIST WITH PROVIDING FOOD VOUCHERS, FOOD BASKETS AND CHILDREN'S GIFTS DURING THE HOLIDAY SEASON	100
JOHNNIE COCHRAN BRAIN TUMOR CENTER 8700 BEVERLY BLVD LOS ANGELES,CA 90048	NONE	PUBLIC	TO PROVIDE THE HIGHEST LEVEL OF PATIENT SATISFACTION WITH SERVICES	200
NYU KIDS OF LANGONE FUND 1 PARK AVENUE 17TH FLOOR NEW YORK,NY 10016	NONE	PUBLIC	TO ENHANCE CLINICAL AND SUPPORTIVE CARE FOR CHILDREN AND FAMILIES, FUND RESEARCH INTO CHILDHOOK ILLNESSES, AND PROMOTE A NURTURING ENVIRONMENT THAT ENABLES CHILDREN TO BE CHILDREN	2,500
NYU STEINHARDT VISION AWARD 82 WASHINGTON SQUARE EAST NEW YORK,NY 10003	NONE	PUBLIC	STEINHARDT IS WORKING TO REDEFINE EDUCATION AS A HOLISTIC HUMAN ENDEAVOR, NYU STEINHARDT WORKS TO INFLUENCE SCHOLARSHIP, RESEARCH, AND POLICIES AT HOME AND ABROAD	5,000
THE CHILDRENS HEARING INSTITUTE 380 SECOND AVENUE 9TH FLOOR NEW YORK,NY 10010	NONE	PUBLIC	HELPING CHILDREN MOVE FROM A WORLD OF SILENCE TO A WORLD OF SOUND	150
THE FAMILY CENTER 493 NOSTRAND AVENUE 3RD FL BROOKLYN,NY 11216	NONE	PUBLIC	WORKS TO STRENGTHEN FAMILIES AFFRECTED BY ILLNESS, CRISIS, OR LOSS TO CREATE A MORE SECURE PRESENT AND FUTURE FOR THEIR CHILDREN	100
THE KNIGHTS 1275 PROSPECT AVENUE BROOKLYN,NY 11218	NONE	PUBLIC	THE KNIGHTS ARE DEEPLY COMMITTED TO CREATING ORIGINAL, ENGAGIN MUSICAL EXPERIENCES	250
UNITED STATES HOLOCAUST MEMORIAL MUSEUM 100 RAOUL WALLENBERG PLACE SW WASHINGTON DC,NY 20024	NONE	PUBLIC	NATIONAL INSTITUTION FOR THE DOCUMENTATION, STUDY, AND INTERPRETATION OF HOLOCAUST HISTORY, AND SERVES AS THIS COUNTRY'S MEMORIAL TO THE MILLIONS OF PEOPLE MURDERED DURING THE HOLOCAUST	825
YOUTHNET 70 N RIDGEWOOD RD SOUTH ORANGE,NJ 07079	NONE	PUBLIC	TO SERVE THE CHILDREN OF MAPLEWOOD AND SOUTH ORANGE, NJ, BY DEVELOPING AND INCUBATING PROGRAMS TO MEET THEIR NEEDS, OBTAINING AND DISTRIBUTING FUNDS TO YOUTH-ORIENTED ORGANIZATIONS AND FACILITATING RESEARCH AND TRAINING FOR SERVICE PROVIDERS	150
Total  3a				107,865

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>				
UJA FEDERATION-GREENWICH ONE HOLLY HILL LANE GREENWICH,CT 06830	NONE	PUBLIC	HELP INSPIRE A PASSION FOR JEWISH LIFE AND LEARNING	2,500
NYU SCHOOL OF MEDICINE ONE PARK AVENUE NEW YORK,NY 10016		PUBLIC	TO TEACH , SERVE AND DISCOVER IN THE FIELD OF MEDICINE	1,000
Total ▶ 3a				107,865

TY 2014 Accounting Fees Schedule

Name: ROBERT & DALE ROSEN CHARITABLE
FOUNDATION TR U/A 8/05/92

EIN: 13-6997530

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PROFESSIONAL FEES	3,850	3,850		0

TY 2014 Investments - Other Schedule**Name:** ROBERT & DALE ROSEN CHARITABLE

FOUNDATION TR U/A 8/05/92

EIN: 13-6997530

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
200 MURPHY OIL	AT COST	1,452	10,104
100 AMGEN	AT COST	2,012	15,929
35 IBM	AT COST	2,473	5,615
1500 SAPIENT CORP	AT COST	15,998	37,320
200 YUM BRANDS	AT COST	0	0
125 JOHNSON & JOHNSON	AT COST	8,707	13,071
50 REGENERON PHARMACEUTICALS	AT COST	7,752	20,512
200 FLY LEASING LTD	AT COST	0	0
200 DISCOVERY COMMUNICATIONS INC SER A	AT COST	11,802	6,890
125 EOG RES INC	AT COST	7,165	11,509
50 MURPHY USA INC	AT COST	0	0
125 GILEAD SCIENCES INC	AT COST	12,730	11,783
500 ENTERPRISE PRODUCTS PARTNERS LP	AT COST	19,035	18,060
200 DISCOVERY COMMUNICATIONS INC SER C	AT COST	0	6,744

TY 2014 Other Assets Schedule

Name: ROBERT & DALE ROSEN CHARITABLE
FOUNDATION TR U/A 8/05/92

EIN: 13-6997530

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
MISCELLANEOUS RECEIVABLE	0	6,595	6,595

TY 2014 Other Expenses Schedule

Name: ROBERT & DALE ROSEN CHARITABLE
FOUNDATION TR U/A 8/05/92

EIN: 13-6997530

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT FEES	1,719	1,719		0
ADR FEES	3	3		0

TY 2014 Taxes Schedule

Name: ROBERT & DALE ROSEN CHARITABLE

FOUNDATION TR U/A 8/05/92

EIN: 13-6997530

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES PAID	30	30		0

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF. ▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990.	OMB No 1545-0047 2014
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Name of the organization ROBERT & DALE ROSEN CHARITABLE FOUNDATION TR U/A 8/05/92	Employer identification number 13-6997530
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Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	☐ 501(c)() (enter number) organization ☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation ☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation ☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation ☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other property) from any one contributor Complete Parts I and II See instructions for determining a contributor's total contributions

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals Complete Parts I, II, and III
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc , purposes, but no such contributions totaled more than \$1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc , contributions totaling \$5,000 or more during the year ▶ \$ _____

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

Name of organization ROBERT & DALE ROSEN CHARITABLE FOUNDATION TR U/A 8/05/92	Employer identification number 13-6997530
--	---

Part I Contributors (see instructions) Use duplicate copies of Part I if additional space is needed			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
<u>1</u>	ROBERT L ROSEN AND DALE ATKINS ROSE 67 PECKSLAND RD GREENWICH, CT 06831	\$ 19,859	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
<u>2</u>	ROBERT L ROSEN AND DALE ATKINS ROSEN 245 PARK AVENUE NEW YORK, NY 10167	\$ 3,850	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
<u>3</u>	ROBERT L ROSEN AND DALE ATKINS ROSE 67 PECKSLAND RD GREENWICH, CT 06831	\$ 19,987	Person ☐ Payroll ☐ Noncash ☒ (Complete Part II for noncash contributions)
<u> </u>		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
<u> </u>		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
<u> </u>		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Part II **Noncash Property** (see instructions) Use duplicate copies of Part II if additional space is needed

Schedule B (Form 990, 990-EZ, or 990-PF) (2014)

Name of organization ROBERT & DALE ROSEN CHARITABLE FOUNDATION TR U/A 8/05/92	Employer identification number 13-6997530
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Part III

Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of **\$1,000 or less** for the year (Enter this information once See instructions) ▶ \$ _____
Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
_____		_____	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
_____		_____	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
_____		_____	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
_____		_____	