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Form 990-PF

Return of Private Foundation

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

▶ Do not enter social security numbers on this form as it may be made public.

OMB No 1545-0052

De	epartm	ent of the Treasury Revenue Service	▶ Inf					curity numbers PF and its separ			-	-			opf. O		ublic Ins	spection
_		lendar year 2014									, and endin						9/30,	
_		of foundation		. ,						A Employer identification nur								
	HEL	EN & WILLIAM	MAZ	ER F	OUND	ATION	ľ						(2-0	51116	0		
_		er and street (or P O						et address)			Room/suite		В	elepho	one numb	er (see II	nstructions	5)
												(90	08) 4	64-82	21			
	P.O	. BOX 542													, -	, -		
_		r town, state or provin	ce, cour	ntry, and	ZIP or	foreign po	stal cod	e			<u> </u>	1		_				
	•			•									C II	exemp	tion applic	ation is		
	BER	KELEY HEIGHT	S. N	J 07	922								Þ	ending,	check her	B - • •		
_		ck all that apply.	<u> </u>		al retur	'n	$\neg \tau$	Initial return	of a f	ormer c	ublic charif	v						
_	0,,,	ok all that apply:			l returi		<u> </u>	Amended r				"			gn organiza gn organiza			
				_	ress cl		F	Name chan						85% t	est, check	here and a	attach	
H	Che	ck type of organi	zation:				c)(3)			ation		ヿ		comp	utation .			
Ī	$\overline{}$	ection 4947(a)(1) r			,			Other taxable p			tion						ras terminati	ed Ded
t		market value o						method: X			rual	\dashv					neck here .	
•		of year (from Pai				_	_	specify)			,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,						ionth termin ieck here	
			364,			_	-	(d) must be on ca	ash bas	: sis)						- X - X - X	•	
		Analysis of Rev				•				,,,,	- T					(d)	Disburse	ments
_	art.	total of amounts in	columi	ns (b),	(c), an	d (d)	, ,) Revenue and expenses per	(b)	Net inve		(0		ljusted		f f	or charita	
		may not necessar column (a) (see in			mount	s in	`	books		incon	ne		ır	come	•	(ca	purpose ash basis	
_	1	Contributions, gifts, gran			attach sci	hedule)			1 -						•	1 (
	2	Check X if th	e founda	ation is	not requ	uired to			1							 		
	3	- 4110						440			440.					АТС	CH 1	
	4	Interest on savings a Dividends and inte	•	-				348,854		34	8,854.						CH 2	
	5a	Gross rents							+ -							1		
											-	-	-		-	-		
a		Net rental income or Net gain or (loss) fro	—			lina 10	 	852,172								 -		
Ž	b	Gross sales price for a	all			,531.			1							1		
Revenue	_	assets on line 6a								85	2,172.		1		55	- IN	IFD	
జ	7	Capital gain net in Net short-term cap	•			•			†						HL!	UL!	<u>veu</u>	-
	8	Income modification							 					4				- 181 -
		Gross sales less return	ns					· · · · · · · · · · · · · · · · · · ·	<u> </u>					থ	nF(23	2015	- 9 -
	١,	and allowances • • Less Cost of goods so				-			<u> </u>					ū	<u></u>	1		121
		Gross profit or (los	_	ch ech	edule)				<u> </u>					1		Stan M		-
	11	Other income (atta						27,300	.	2	7,300.			i	OG	VE!	1. U	
	12	Total. Add lines 1						1,228,766			8,766.							
_	13	Compensation of offi						7,500										7,500.
es	Į.	Other employee sa						· · · · · · · · · · · · · · · · · · ·	1					,		1		
Š	15	Pension plans, em			-													
Spe	16a	Legal fees (attach						4,000										4,000.
ú	14 15 16 a b c 17 18 19 20 21	Accounting fees (a						4,500			1,500.							3,000.
Ş		Other professional						109			109.					1		
ati	17	Interest . ATCH						20			20.							
istr	18	Taxes (attach sche						12,234		1	2,234.							
Ē	19	Depreciation (attach				-				,								
투	20	Occupancy							1									
₹	21	Travel, conference																
JUE	22	Printing and public	-		•			-	1							1		
Ď	23	Other expenses (a						121,248		11	3,585.					1		7,663.
itin	23 24 25	Total operating a			•			_	1									
era	ļ ⁻ _	Add lines 13 throu				-		149,611	.	12	7,448.						2	22,163.
å	25	Contributions, gifts	-					776,376				•		_				76,376.
_	26	Total expenses and dist	-	•				925,987		12	7,448.					d		8,539.
_	27	Subtract line 26 fr																
		Excess of revenue over			sbursem	ents		302,779	.									(
		Net investment in	-							1,10	1,318.							
		Adjusted net inco	•	_														
_												_	_		_		000 [

Part I		Attached schedules and amounts in the description column should be for end-of-year	Beginning of year	End of year				
Ľ	art II	amounts only (See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value			
	1	Cash - non-interest-bearing	1,362,198.	1,263,646.	1,263,646			
	2	Savings and temporary cash investments						
		Accounts receivable			· · · · · · · · · · · · · · · · · · ·			
		Less allowance for doubtful accounts ▶						
	4	Pledges receivable						
		Less allowance for doubtful accounts ▶						
	5	Grants receivable						
		Receivables due from officers, directors, trustees, and other						
		disqualified persons (attach schedule) (see instructions)						
	7	Other notes and loans receivable (attach schedule)		* 3,000.	ATCH 10			
	•	Less allowance for doubtful accounts ▶		3,000.	3,000			
ø	8	Inventories for sale or use						
ssets	9	Prepaid expenses and deferred charges						
As		Investments - U S and state government obligations (attach schedule)			-			
		Investments - corporate stock (attach schedule) ATCH 11	8,788,870.	9,146,530.	13,761,021			
	L .	Investments - corporate bonds (attach schedule)			· · ·			
	11 °	Investments - land, buildings, and equipment basis Less accumulated depreciation (attach schedule)						
	12	Investments - mortgage loans			_			
	13 14	Investments - other (attach schedule) ATCH 12 Land, buildings, and	261,098.	301,769.	301,769			
		equipment basis Less accumulated depreciation (attach schedule)						
	15	Other assets (describe ATCH 13)	35,000.	35,000.	35,000			
	16	Total assets (to be completed by all filers - see the						
		instructions Also, see page 1, item I)	10,447,166.	10,749,945.	15,364,436			
_	17	Accounts payable and accrued expenses						
	18	Grants payable		-				
Ŋ	1 -	Deferred revenue	l	-				
iţi	20	Loans from officers, directors, trustees, and other disqualified persons	1					
Liabilities	21	Mortgages and other notes payable (attach schedule)		, <u> </u>				
Ë	22	Other liabilities (describe						
		,						
	23	Total liabilities (add lines 17 through 22)	0	0				
ses		Foundations that follow SFAS 117, check here ▶ and complete lines 24 through 26 and lines 30 and 31.						
Net Assets or Fund Balances	24	Unrestricted						
Bal	25	Temporarily restricted						
5	26	Permanently restricted						
Ξ		Foundations that do not follow SFAS 117, ► X						
6		check here and complete lines 27 through 31.	6,697,565.	6,697,565.				
ts	27	Capital stock, trust principal, or current funds	0,097,303.	0,037,303.				
SSE	28	Paid-in or capital surplus, or land, bldg , and equipment fund	3,749,601.	4,052,380.				
Ā	29	Retained earnings, accumulated income, endowment, or other funds	10,447,166.	10,749,945.				
Ž	30	Total net assets or fund balances (see instructions)	10,447,100.	10,749,945.				
	31	Total liabilities and net assets/fund balances (see	10 447 166	10 740 045				
		Instructions)	10,447,166.	10,749,945.				
		Analysis of Changes in Net Assets or Fund Bala		must sares with				
1		al net assets or fund balances at beginning of year - Part		_	10 447 100			
_		-of-year figure reported on prior year's return)		10,447,166				
2	. Ente	er amount from Part I, line 27a		302,779				
3 Other increases not included in line 2 (itemize) ▶								
4 Add lines 1, 2, and 3 10,749								
5	Dec	reases not included in line 2 (itemize) ►_al net assets or fund balances at end of year (line 4 minus	- las 5) Day II and	5	10 740 045			
_6	Iota	al net assets or fund balances at end of year (line 4 minus	s line 5) - Paπ II, column ((b), line 30 6	10,749,945			

Page 3

P	art IV Capital Gains	and Losses for Tax on Inve	estment Income			
		describe the kind(s) of property sold (♥ :	(b) How acquired	(c) Date acquired	(d) Date sold
		shs MLC Co)	P - Purchase D - Donation	(mo , day, yr)	(mo , day, yr)	
<u>1a</u>	SEE PART IV SCHEI	DULE				
_ <u>b</u>						
_ <u>c</u>						
<u>_d</u>						
<u>e</u>						
	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale		(h) Gain or (lo	
<u>a</u>					 .	
<u>b</u>						
_ <u>c</u>						
<u>_d</u>						
<u>e</u>	Complete only for assets	showing gain in column (h) and owne	d by the foundation on 12/21/69			
	Complete only for assets s				Gains (Col (h) g	
_	(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	COI	(k), but not less t Losses (from co	
<u>a</u>		<u></u>				
<u>b</u>						
<u> </u>	<u> </u>					
<u>d</u>						
<u>e</u>				<u> </u>		
2	Capital gain net income of		gain, also enter in Part I, line 7 (loss), enter -0- in Part I, line 7	2		852,172.
3		in or (loss) as defined in sections	The state of the s			
	-	irt I, line 8, column (c) (see inst				
				3		0
Р	art V Qualification U	Inder Section 4940(e) for Red	duced Tax on Net Investment la	ncome		
Wa			utable amount of any year in the bath	ase period	1?	Yes X No
1		· · · · · · · · · · · · · · · · · · ·	r, see the instructions before makin	any enti	ries.	
	(a)	(b)	(c)	<u>J,</u>	(d)	
C	Base penod years alendar year (or tax year beginning in)	Adjusted qualifying distributions	Net value of nonchantable-use assets		Distribution ra (col (b) divided by	tio col (c))
	2013	811,935.	16,182,354.			0.050174
	2012	681,858.	14,252,889.			0.047840
	2011	666,796.	12,140,296.			0.054924
	2010	577,793.	12,465,311.			0.046352
_	2009	545,718.	11,150,037.			0.048943
2	Total of line 1, column (d))		2		0.248233
3		for the 5-year base period - divid	• • •			0.040645
	number of years the foun	dation has been in existence if les	s than 5 years	3		0.049647
4	Enter the net value of nor	ncharitable-use assets for 2014 fro	om Part X, line 5	4	16,	145,038.
5	Multiply line 4 by line $\bf 3$.			5		801,553.
6	Enter 1% of net investme	nt income (1% of Part I, line 27b)		6 11,013.		
		•				
7	Add lines 5 and 6			7		812,566.
8			in Part VI, line 1b, and complete t	8 hat part		798,539. c rate. See the

Х

Pai	rt VII-A Statements Regarding Activities (continued)			
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the			
	meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		X
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		X_
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?		Х	
	Website address ► N/A			
14	The books are in care of ► LEONARD BERKOWITZ Telephone no ► 908-464	-822	1	
	Located at ►C/O FOUNDATION P.O. BOX 542 BERKELEY HEIGHTS, NJ ZIP+4 ► 07922			
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			
16	At any time during calendar year 2014, did the foundation have an interest in or a signature or other authority	1	Yes	
	over a bank, securities, or other financial account in a foreign country?	16		<u>X</u>
	See the instructions for exceptions and filing requirements for FinCEN Form 114, (formerly TD F 90-221) If			
Par	"Yes," enter the name of the foreign country ► rt VII-B Statements Regarding Activities for Which Form 4720 May Be Required	L		
га		Γ	Yes	No
4-	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		162	140
ıa	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 X No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a			
	disqualified person?			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?			
	(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)?			
	(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)			
b	olf 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)?	1b		X
	Organizations relying on a current notice regarding disaster assistance check here			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that		1	
	were not corrected before the first day of the tax year beginning in 2014?	1c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private			
	operating foundation defined in section 4942(j)(3) or 4942(j)(5))	ł		
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? Yes X No			
	If "Yes," list the years			
t	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	0.		
	all years listed, answer "No" and attach statement - see instructions)	2b		
	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here			
2 -	a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise			
36	at any time during the year?			
	of "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		
4 a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		Х
	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		Х
		m 99	0-PF	(2014)

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

Form	990-PF (2014)		Page 7
Par	Information About Officers, Directors, Trustees, Foundation Ma and Contractors (continued)	anagers, Highly Paid Emplo	yees,
3	Five highest-paid independent contractors for professional services (see ins	tructions). If none, enter "NONE	."
	(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NON	IE .		
			0
Tota	Il number of others receiving over \$50,000 for professional services		
Par	t IX-A Summary of Direct Charitable Activities		
	st the foundation's four largest direct charitable activities during the tax year. Include relevant statistic ganizations and other beneficianes served, conferences convened, research papers produced, etc.	al information such as the number of	Expenses
	N/A		
٠-			
-			
2			
_			
_			
3 _			
-			
4			
•			
Pa	t IX-B Summary of Program-Related Investments (see instructions)		
	escribe the two largest program-related investments made by the foundation during the tax year on lines 1	and 2	Amount
1_	N/A		
-			
2			
-			
-			
Α	l other program-related investments. See instructions		<u></u>
3	NONE		
_			
_			
Tota	al. Add lines 1 through 3	<u> </u>	

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Pari	Minimum Investment Return (All domestic foundations must complete this part. Fore see instructions.)	ign founda	tions,
1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc.,		
	purposes:		
а	Average monthly fair market value of securities	1a	14,901,683.
b			1,315,092.
С		1c	316,434.
d	Total (add lines 1a, b, and c)	1d	16,533,209.
е			
	1c (attach detailed explanation)	」	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see	3	16,533,209.
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see		
	instructions)	4	388,171.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	16,145,038.
_6	Minimum investment return. Enter 5% of line 5		807 , 252.
Par	TXI Distributable Amount (see instructions) (Section 4942(J)(3) and (J)(5) private operating four and certain foreign organizations check here ▶ and do not complete this part)	ndations	
1	Minimum investment return from Part X, line 6	1	807,252.
2a	Tax on investment income for 2014 from Part VI, line 5		
b	Income tax for 2014 (This does not include the tax from Part VI.). 2b]]	
С		2c	22,026.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	785,226.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	785,226.
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5 Enter here and on Part XIII,		
	line 1	7	785,226.
Par	t XII Qualifying Distributions (see instructions)		
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
а	Expenses, contributions, gifts, etc total from Part I, column (d), line 26	1a	798,539.
þ		1b	
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		
а		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		798,539.
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	798,539.
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when a qualifies for the section 4940(e) reduction of tax in those years.	calculating	whether the foundation

	n 990-PF (2014)			_	Page 9
Pa	rt XIII Undistributed Income (see instruct	ions)			
1	Distributable amount for 2014 from Part XI,	(a) Corpus	(b) Years prior to 2013	(c) 2013	(d) 2014
	line 7				785,226.
2	Undistributed income, if any, as of the end of 2014				
а	Enter amount for 2013 only				
b	00 10 00 11 10				
3	Excess distributions carryover, if any, to 2014		- :		
а	From 2009				
b	From 2010				
С	From 2011 19,411.				
d	F 0040				
е	From 2012				
	Total of lines 3a through e	42,610.			
	Qualifying distributions for 2014 from Part XII,				-
	line 4 ▶ \$ 798,539.				
а	Applied to 2013, but not more than line 2a				
	Applied to undistributed income of prior years				
	(Election required - see instructions)	-			
С	Treated as distributions out of corpus (Election required - see instructions)				
d	Applied to 2014 distributable amount				785,226.
е	Remaining amount distributed out of corpus	13,313.			
5 6	Excess distributions carryover applied to 2014 (If an amount appears in column (d), the same amount must be shown in column (a)) Enter the net total of each column as				
	indicated below:				
а	Corpus Add lines 3f, 4c, and 4e Subtract line 5	55,923.			
b	Prior years' undistributed income. Subtract				
_	line 4b from line 2b 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				
4	Subtract line 6c from line 6b Taxable				
u	amount - see instructions				
е	Undistributed income for 2013 Subtract line 4a from line 2a Taxable amount - see instructions				
f	Undistributed income for 2014 Subtract lines				
	4d and 5 from line 1 This amount must be distributed in 2015				
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)				
8	Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions)				
9	Excess distributions carryover to 2015.	EE 022			
	Subtract lines 7 and 8 from line 6a	55,923.			
	Analysis of line 9				
а	Excess from 2010				
b					
Ç					
d	12 212				
е	Excess from 2014				

Pa	rt XIV Private Op	erating Foundations	s (see instructions ar	nd Part VII-A, questi	on 9)	NOT APPLICABLE		
1 a	If the foundation has				ating			
	foundation, and the rulin				▶			
b	Check box to indicate v	whether the foundation	is a private operating	foundation described in	section 4942(j)(3) or 4942(j)(5)		
2 a	Enter the lesser of the ad-	Tax year		Prior 3 years		(e) Total		
	justed net income from Part I or the minimum investment	(a) 2014	(b) 2013	(c) 2012	(d) 2011	· · · · · · · · · · · · · · · · · · ·		
	return from Part X for each							
	year listed							
b	85% of line 2a							
С	Qualifying distributions from Part							
	XII, line 4 for each year listed .							
đ	Amounts included in line 2c not used directly for active conduct							
	of exempt activities							
е	Qualifying distributions made directly for active conduct of							
	exempt activities Subtract line							
3	2d from line 2c							
3	Complete 3a, b, or c for the alternative test relied upon							
а	"Assets" alternative test - enter							
	(1) Value of all assets	-						
	(2) Value of assets qualifying under section							
_	4942(j)(3)(B)(i)							
D	"Endowment" alternative test- enter 2/3 of minimum invest-							
	ment return shown in Part X,							
	line 6 for each year listed							
С	"Support" alternative test - enter							
	(1) Total support other than gross investment income							
	(interest, dividends, rents, payments on secunties							
	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 sup- port from an exempt							
	organization							
Pa		ntary Information (Complete this part	only if the found	lation had \$5 000	or more in assets		
		during the year - s				or more in access		
1	Information Regarding	g Foundation Manage	rs:	 -	 			
а	List any managers of	the foundation who h	nave contributed more	e than 2% of the tota	al contributions receiv	ved by the foundation		
	before the close of any	tax year (but only if th	ey have contributed n	nore than \$5,000) (Se	ee section 507(d)(2).)			
	NONE							
b	List any managers of					y large portion of the		
	ownership of a partner	rship or other entity) of	which the foundation	has a 10% or greater	interest.			
	NONE							
2	Information Regardin	•	•					
	Check here ► X If t	he foundation only i	makes contributions	to preselected chari	itable organizations a	and does not accept		
				ints, etc. (see instruct	tions) to individuals o	r organizations under		
	other conditions, comp					<u> </u>		
а	The name, address, a	nd telephone number	or e-mail address of t	he person to whom ap	plications should be ad-	dressed.		
	The form of the					 		
D	b The form in which applications should be submitted and information and materials they should include							
	Any submission des de	200						
C	c Any submission deadlines							
	Any restrictions or li	mitations on awards	such as hy geogra	phical areas charite	hle fields kinds of i	netitutions or other		
u	factors.	initiations on awalus,	outil as by geogra	priidai areas, charita	DIC HEIGS, KIIIGS OF I	namental, or other		

Page **11**

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 forundation manager or substantial contributor Purpose of grant or contribution Amount Name and address (home or business) Amount Amount									
Recipient	If recipient is an individual, show any relationship to	Foundation	Purpose of grant or contribution	Amount					
Name and address (home or business)	any foundation manager or substantial contributor	recipient	contribution	Amount					
a Paid during the year									
ATCH 16									
		1							
		_							
Total	<u> </u>	<u></u>	3a	776 , 376.					
b Approved for future payment									
		ĺ							
		i							
Total		:							
	 ,			<u> </u>					

Page **12**

Part XVI	A Analysis of Income-Produ amounts unless otherwise indicated	 	vities ated business income	Excluded by	y section 512, 513, or 514	(e)
•	amounts unless otherwise indicated	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	Related or exempt function income (See instructions)
-	i service revenue					(See instructions)
_						
f						
g Fees	and contracts from government agencies					
2 Member	ship dues and assessments					
	on savings and temporary cash investments			14	440.	
4 Dividend	is and interest from securities			14	348,854.	
5 Net rent	al income or (loss) from real estate					
	-financed property					
b Not o	debt-financed property					
6 Net renta	l income or (loss) from personal property .					
7 Other in	vestment income	900099	17,390.	14	9,910.	
8 Gain or (loss) from sales of assets other than inventory	/ <u> </u>		18	852,172.	
9 Net inco	me or (loss) from special events					
10 Gross p	rofit or (loss) from sales of inventory					
11 Other re	venue a					
b						
c						
d						
е			17.000		1 011 076	
	Add columns (b), (d), and (e)					
	dd line 12, columns (b), (d), and (e).				13	1,228,766.
Part XVI-	Relationship of Activities	· · · · · · · · · · · · · · · · · · ·		1 D		<u> </u>
Line No.	Explain below how each activity					uted importantly to the
▼	accomplishment of the foundation					
					 .	
						
						
	-			_		· · · · · · · · · · · · · · · · · · ·
					 -	
	<u>-</u>				-	
	<u>-</u>	,			-	
						
			· · ·			
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				<u> </u>		
	<u> </u>					
					 	
					. _	
					·	
						 _
-						

Form 990-PF (2014) HELEN & WILLIAM MAZER FOUNDATION 02-0511160 Information Regarding Transfers To and Transactions and Relationships With Noncharitable **Exempt Organizations** Did the organization directly or indirectly engage in any of the following with any other organization described Yes No in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political a Transfers from the reporting foundation to a noncharitable exempt organization of Χ **b** Other transactions: Х c Sharing of facilities, equipment, mailing lists, other assets, or paid employees 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. (b) Amount involved (c) Name of noncharitable exempt organization (d) Description of transfers, transactions, and sharing arrangements (a) Line no N/A N/A 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? b If "Yes," complete the following schedule: (c) Description of relationship (a) Name of organization (b) Type of organization 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, of preparer (other than taxpayer) is based on all information of which preparer has any knowledge

Firm's EIN **▶**13-1639826 732-243-7000 Phone no

the IRS discuss this return

X Yes

P01268195

Form 990-PF (2014)

the preparer

(see instructions)?

self-employed

Sign

Here

Paid

Preparer

Use Only

Signature of officer or trustee

TIMOTHY

Firm's name

Firm's address

Print/Type preparer's name

O'ROURKE

ISELIN,

► EISNERAMPER LLP

▶ 111 WOOD AVE SO STE 600

Date

Preparer's signature

12/11/2015

08830-2700

Title

02-0511160

HELEN & WILLIAM MAZER FOUNDATION 02-0511160
FORM 990-PF - PART IV
CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

Kind of Property		Description				P 등 D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis	ľ	Gain or (loss)	
21.		SEE ATTACHEI PROPERTY TY	O STATEMENT		<u> </u>	P	VAR	VAR
21.		SEE ATTACHE	O STATEMENT			P	-61. VAR	VAR
1,797,510.		PROPERTY TY: 945,277.					852,233.	
OTAL GAIN(L	oss)			••••			<u>852,172.</u>	
						:		

02-0511160

ATTACHMENT 1

FORM 990PF, PART I - INTEREST ON TEMPORARY CASH INVESTMENTS

DESCRIPTION		REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT <u>INCOME</u>
MIDMARK INVESTORS LP VCFA VENTURE PARTNERS III, LP VCFA VENTURE PARTNERS V LP MIDMARK CAPITAL II LP		74. 61. 287. 18.	74. 61. 287. 18.
	TOTAL	440.	440.

02-0511160

ATTACHMENT 2

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

DESCRIPTION		REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT <u>INCOME</u>
FIDELITY INVESTMENTS KAHN BROTHERS VCFA VENTURE PARTNERS III LP VCFA VENTURE PARTNERS V, LP		105. 348,576. 138. 35.	105. 348,576. 138. 35.
	TOTAL	348,854.	348,854.

ATTACHMENT 3

FORM 990PF, PART I - OTHER INCOME

DESCRIPTION MIDMARK INVESOTRS, LP-ORDINARY INCOME	REVENUE AND EXPENSES PER BOOKS 3,687.	NET INVESTMENT INCOME 3,687.
VCFA VENTURE PARTNERS V, LP-ORDINARY BUISNESS INCOME	-7.	-7.
MIDMARK INVESTORS, LP-ORDINARY	•	
BUSINESS INCOME	15,138.	15,138.
VCFA VENTURE PARTNERS III, LP-ORDINARY BUSINESS INCOME	~63.	-63.
VCFA VENTURE PARTNERS V, LP-NET RENTAL	00.	03.
REAL ESTATE	-3.	• • •
MIDMARK CAPITAL II, - LP SECT. 1231 GAIN	-30. -123.	-30.
MIDMARK INVESTORS, LP - SECT. 1231 GAIN VCFA VENTURE PARTNERS III, LP - OTHER	-123.	-123.
PORTFOLIO INCOME	37.	37.
VCFA VENTURE PARTNERS V, LP - OTHER		
PORTFOLIO INCOME VCFA VENTURE PARTNERS III, LP - OTHER	165.	165.
INCOME	531.	531.
VCFA VENTURE PARTNERS V, LP - OTHER		
INCOME	9,016.	9,016.
VCFA VENTURE PARTNERS III, LP-NET RENTAL REAL ESTATE	13.	13.
PA STATE TAX REFUND	374.	374.
MIDMARK CAPITAL II, LP 179 DEDUCTION	-281.	-281.
MIDMARK INVESTORS, LLC 179 DEDUCTION	-1,154.	-1,154.
TOTALS	27,300.	27,300.

ATTACHMENT	4		

FORM 990PF, PART I - LEGAL FEES

REVENUE NET ADJUSTED AND EXPENSES INVESTMENT NET CHARITABLE PER BOOKS INCOME INCOME PURPOSES DESCRIPTION 4,000. LEGAL FEES 4,000. 4,000. 4,000. TOTALS

02-0511160

ATTACHMENT 5

FORM 990PF, PART I - ACCOUNTING FEES

<u>DESCRIPTION</u>		REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT <u>INCOME</u>	ADJUSTED NET INCOME	CHARITABLE PURPOSES
ACCOUNTING		4,500.	1,500.		3,000.
	TOTALS	4,500.	1,500.		3,000.

02-0511160

ATTACHMENT 6

FORM 990PF, PART I - OTHER PROFESSIONAL FEES

REVENUE

AND

NET

EXPENSES PER BOOKS INVESTMENT INCOME

DESCRIPTION

OTHER PROFESSIONAL FEES FROM

FLOW-THROUGH ENTITY

109.

109.

TOTALS

109.

109.

02-0511160

ATTACHMENT 7

FORM 990PF, PART I - INTEREST EXPENSE

REVENUE

AND

NET

EXPENSES PER BOOKS

INVESTMENT INCOME

DESCRIPTION INTEREST EXPENSE FROM FLOW THROUGH ENTITIES

20.

20.

TOTALS

20.

20.

ATTACHMENT 7 PAGE 24

02-0511160

ATTACHMENT 8

FORM 990PF, PART I - TAXES

DESCRIPTION	REVENUE AND EXPENSES PER BOOKS	NET INVESTMENT <u>INCOME</u>
FOREIGN TAXES PAID FROM FLOW-THROUGH ENTITIES FEDERAL TAX PAYMENT	43. 12,191.	43. 12,191.
TOTALS	12,234.	12,234.

02-0511160

ATTACHMENT 9

FORM 990PF, PART I - OTHER EXPENSES

	REVENUE AND EXPENSES	NET INVESTMENT	CHARITABLE
DESCRIPTION	PER BOOKS	INCOME	PURPOSES
INVESTMENT MANAGEMENT FEES	97,968.	97,968.	
ADMINISTRATIVE EXPENSES	1,271.	25.	1,246.
OTHER DEDUCTIONS FROM			
FLOW-THROUGH ENTITIES	9.	9.	
OTHER PORTFOLIO DEDUCTION FROM			
FLOW-THROUGH ENTITIES	819.	819.	
TRAVEL EXPENSES -			
DIRECTOR REIMBURSEMENT	6,417.		6,417.
PORTFOLIO DEDUCTIONS SUBJECT			
TO 2% AGI FROM FLOW-THROUGH			
ENTITIES	14,764.	14,764.	
TOTALS	121,248.	113,585.	7,663.
10111110			

ATTACHMENT 10

FORM 990PF, PART II - OTHER NOTES AND LOANS RECEIVABLE

BORROWER:		PEOPLE		
ORIGINAL AMOUN	T:		3,	000.

ENDING BALANCE DUE	3,000.
ENDING FAIR MARKET VALUE	3,000.
TOTAL ENDING BOOK - OTHER NOTES AND LOANS RECEIVABLE	3,000.
TOTAL ENDING FMV - OTHER NOTES AND LOANS RECEIVABLE	3,000.

02-0511160

ATTACHMENT 11	ACHMENT 11	

FORM 990PF, PART II - CORPORATE STOCK

DESCRIPTION	ENDING BOOK VALUE	ENDING <u>FMV</u>
INVESTMENTS - KAHN BROTHERS INVESTMENTS - FIDELITY	9,143,782. 2,748.	13,757,942. 3,079.
TOTALS	9,146,530.	13,761,021.

ATTACHMENT 12

FORM 990PF, PART II - OTHER INVESTMENTS

DESCRIPTION	ENDING BOOK VALUE	ENDING <u>FMV</u>
INVESTMENT - VCFA VENTURE III INVESTMENT - VCFA VENTURE V INVESTMENT - MIDMARK INVESTORS INVESTMENT-MIDMARK CAPITAL II	112,562. 67,513. 51,481. 70,213.	112,562. 67,513. 51,481. 70,213.
TOTALS	301,769.	301,769.

02-0511160

ATTACHMENT 13

FORM 990PF, PART II - OTHER ASSETS

DESCRIPTION

ENDING BOOK VALUE ENDING <u>FMV</u>

ISRAEL PROPERTY

35,000.

35,000.

TOTALS

35,000.

35,000.

ATTACHMENT 14

FORM 990PF, PART VII-A, LINE 8B - EXPLANATION OF NON-FILING

DELAWARE FILING IS NOT REQUIRED.

FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

ATTACHMENT 15

EXPENSE ACCT AND OTHER ALLOWANCES

TITLE AND AVERAGE HOURS PER NAME AND ADDRESS WEEK DEVOTED TO POSITION

COMPENSATION

LINDA BERKOWITZ

C/O HELEN & WILLIAM MAZER FOUNDATIO BERKELEY HEIGHTS, NJ 07922

PRESIDENT

.50

LEONARD BERKOWITZ

C/O HELEN & WILLIAM MAZER FOUNDATIO BERKELEY HEIGHTS, NJ 07922

TREASURER

2.00

ALAN BERKOWITZ

C/O HELEN & WILLIAM MAZER FOUNDATIO BERKELEY HEIGHTS, NJ 07922

DIRECTOR

.50

DAVID BERKOWITZ

C/O HELEN & WILLIAM MAZER FOUNDATIO BERKELEY HEIGHTS, NJ 07922

DIRECTOR

.50

STEVEN BERCU

C/O HELEN & WILLIAM MAZER FOUNDATIO BERKELEY HEIGHTS, NJ 07922

DIRECTOR

2.00

7,500.

6,417.

GRAND TOTALS

7,500.

6,417.

ATTACHMENT 15 PAGE 32

6894DW F505 12/7/2015 4:14:59 PM V 14-7.8F 0280557.5

FORM 990RE PART YV - CRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

ATTACHMENT 16

RELATIONSHIP TO SUBSTANTIAL CONTRIBUTOR

AND

RECIPIENT NAME AND ADDRESS

FOUNDATION STATUS OF RECIPIENT

SEE STATEMENT ATTACHED

CHARITABLE PURPOSES

776,341

THE FOUNDATION DOES NOT ACCEPT ANY UNSOLICITED

CHARITABLE CONTRIBUTION FROM FLOW-THROUGH ENTITIES

CHARITABLE PURPOSES THE FOUNDATION DOES NOT 35

ACCEPT ANY UNSOLICITED PROPOSALS

PROPOSALS

> ATTACHMENT 16 PAGE 33

6894DW F505 12/7/2015 4 14 59 PM V 14-7 8F 0280557 5

Helen William Mazer Foundation

EIN: 02-0511160

Filing year: 10/01/2014 - 09/30/2015 (Form 990 PF)

Attachment to Part XV line 3a.

Date	Check #	Recipient's Name	Recipient City/State	Amount
10/10/2014	450	Temple Sinai	Summit, NJ	1,000
10/15/2014	440	Bikes Not Bombs	Jamaica Plains, MA	1,000
10/16/2014	431	Belmont Day School	Belmont, MA	1,000
10/16/2014	435	Museum of Fine Arts	Boston, MA	1,000
10/20/2014	434	Trustees of Reservations	Beverly, MA	5,000
10/20/2014	442	Inst. Of Contemporary Art	Boston, MA	10,000
10/20/2014	443	The Masters School	Dobbs Ferry, NY	1,000
10/20/2014	445	Boston Mobilization	Boston, MA	2,000
10/21/2014	432	Harvard Law School	Cambridge, MA	1,000
10/21/2014	433	Mass Audubon Society	Lincoln, MA	1,000
10/21/2014	444	The Long Now Foundation	San Francisco, CA	1,000
10/24/2014	437	Concord Academy	Concord, MA	2,500
10/24/2014	438	Concord Academy	Concord, MA	15,000
10/27/2014	441	Indian Hill Music Inc	Littleton, MA	2,500
10/29/2014	436	Ecocity Builders	San Francisco, CA	1,000
11/3/2014	439	Boston Cyclists Union	Cambridge, MA	5,000
11/6/2014	446	Livable Streets	Boston, MA	5,000
11/12/2014	458	Yeshiva Ktana	Passaic, NJ	2,500
11/12/2014	459	Rabbinical Seminary of America	Flushing, NJ	2,500
11/13/2014	453	Sharron Miller Academy	Montclair, NJ	1,000
11/20/2014	452	Montclair Public Libr Fdn	Montclair, NJ	1,000
11/20/2014	456	Clark University	Worcester, MA	2,500
11/20/2014	461	NY Times Neediest Cases Fund	New York, NY	5,000
11/20/2014	462	Hackensack Riverkeeper	Hackensack, NJ	3,000
11/21/2014	460	Chamber Music Associates	New York, NY	3,000
11/24/2014	455	Brandeis University	Waltham, MA	2,000
11/24/2014	Wire Tsfr Fi	Transportation Choices	Oakland, CA	7,851
11/26/2014	464	UJA Metrowest	Whippany, NJ	1,800
11/26/2014	465	UJA Metrowest	Whippany, NJ	8,500
11/28/2014	463	HomeFirst	Plainfield, NJ	7,000
12/3/2014	471	Northeast Wilderness Trust	Bristol, VT	2,500
12/3/2014	473	Connecticut Sponsoring Committee	New Haven, CT	5,000
12/4/2014	470	WPKN Inc	Bridgeport, CT	500
12/5/2014	468	Cold Spring School	New Haven, CT	5,000
12/5/2014	469	Connecticut Food Bank	New Haven, CT	5,000
12/8/2014	451	Imani	Montclair, NJ	500
12/8/2014	454	WNYC	New York, NY	1,500
12/11/2014	467	Burroughs Community Center	Bridgeport, CT	1,000
12/12/2014	472	Congregation Bnai Israel	Bridgeport, CT	8,000
12/12/2014	475	Trinitas Health Foundation	Elizabeth, NJ	2,500
12/18/2014	477	Bike Montclair	Montclair, NJ	3,000
12/19/2014	476	American Jewish World Service	New York, NY	7,500
12/22/2014	466	Aspetuck Land Trust	Bridgeport, CT	1,000
12/24/2014	478	Newark Museum	Newark, NJ	1,000
1/2/2015	474	Connecticut News Project	Hartfod, CT	1,000
1/14/2015	481	Give Direct	New York, NY	1,500
1/14/2015	482	The Arnold Gold Fdn	Englewood, NJ	1,000
1/21/2015	485	Cancer Support Community	Knoxville, TN	1,000
1/22/2015	479	Livable Streets	Boston, MA	25,000
1/22/2015	486	NY Public Library	New York, NY	500
-,,,,,	.55	Sone siolary	11011 101Ny 111	500

Helen William Mazer Foundation

EIN: 02-0511160

Filing year 10/01/2012 - 09/30/2013 (Form 990 PF)

Attachment to Part XV line 3a

Date	Check #	Recipient's Name	Recipient City/State	Amount
1/29/2015	483	Hackensack Riverkeeper	Hackensack, NJ	2,000
1/30/2015	487	Trust for Public Land	New Haven, CT	20,000
2/2/2015	488	New Jersey Conservation Fdn	Far Hills, NJ	32,153
2/12/2015	489	League of American Bicyclists	Washington, DC	5,000
2/20/2015	493	493 Trustees of Reservations	Beverly, MA	50,000
3/2/2015	492	Boston Cyclists Union	Jamaica Plains, MA	20,000
3/3/2015	484	Philanthropic Planning Group	New York, NY	1,000
3/4/2015	491	Montclair Fund for Educational Excellence	Montclair, NJ	2,500
3/18/2015	494	Community Refuge Church	Manalapan, NJ	5,000
3/24/2015	495	The Nature Conservancy - Maine	Brunswick, ME	25,000
4/16/2015	499	JDRF	New York, NY	30,000
4/17/2015	496	Center for an Agricultural Economy	Hardwick, VT	5,000
4/20/2015	497	Fairfield County Community Fdn	Fairfield, CT	5,000
4/21/2015	506	Ecocity Builders	San Francisco, CA	25,000
4/23/2015	500	Central Park Conservancy	New York, NY	700
4/24/2015	501	City Harvest	New York, NY	700
4/28/2015	503	The Connection for Women & Fa	Summit, NJ	1,000
4/28/2015	505	Our House Fdn	Berkeley Heights, NJ	500
4/29/2015	502	Covenant House	New York, NY	500
4/29/2015	504	Rails to Trails	Washington, DC	500
4/29/2015	507	Berkeley Heights YMCA	Berkeley Heights, NJ	1,000
5/1/2015	498	Cold Spring School	New Haven, CT	15,000
5/1/2015	508	The Innocence Project	New York, NY	18,000
5/7/2015	510	International Rescue Committee	New York, NY	10,000
5/7/2015	511	Seeds of Peace	New York, NY	7,000
5/7/2015	512	Ethical Culture Fieldston School	New York, NY	2,500
5/11/2015	513	MSKCC	New York, NY	10,000
5/11/2015	516	National Mentoring Partnership	Boston, MA	3,500
5/12/2015	514	GSWA	New Vernon, NY	5,000
5/14/2015	517	Roundabout Theatre Company	New York, NY	2,500
5/15/2015	515	American Diabetes Association	Alexandria, VA	10,000
5/18/2015	509	New York Public Radio	New York, NY	5,000
5/22/2015	518	American Fed for Aging Research	New York, NY	25,000
6/20/2015	521	WNET/Thirteen	New York, NY	3,500
6/23/2015	520	AIDS Walk	New York, NY	500
7/6/2015	527	Rockefeller University	New York, NY	40,000
7/10/2015	522	Ubuntu Education Fund	New York, NY	6,000
7/13/2015	526	Trinitas Health Foundation	Elizabeth, NJ	10,000
7/14/2015	373	Inside Circle Foundation	Sacramento, CA	2,000
7/17/2015	525	Jespy House	South Orange, NJ	600
7/28/2015	529	League of American Bicyclists	Washington, DC	1,000
7/28/2015	533	Women for Women	Washington, DC	1,000
7/29/2015	534	Planned Parenthood	Newark, NJ	2,000
7/30/2015	532	Kenya Education Foundation	New York, NY	3,000
8/12/2015	530	Boston Cyclists Union	Jamaica Plains, MA	5,000
8/12/2015	Wire Tsfr Fi	Transportation Choices	Oakland, CA	7,787
8/18/2015	531	Masters School	Dobbs Ferry, NY	1,000
8/18/2015	538	Temple Sinai	Summit, NJ	1,000
8/18/2015	539	Raptor Trust	Millington, NJ	1,000
8/20/2015	536	Doctors without Borders	New York, NY	5,000
				2,000

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Helen William Mazer Foundation

EIN. 02-0511160

Filing year: 10/01/2012 - 09/30/2013 (Form 990 PF)

Attachment to Part XV line 3a.

Date	Check #	Recipient's Name	Recipient City/State	Amount
8/21/2015	537	Northeast Wilderness Trust	Bristol, VT	3,000
8/31/2015	Wire Tsfr Fi	Ecocities Builders	San Francisco, CA	5,000
9/8/2015	541	People for Bikes	Boulder, CO	16,250
9/10/2015	540	Breast Cancer Emergency Fund	Westport, CT	1,000
9/10/2015	544	AMREF	New York, NY	2,000
9/10/2015	546	Brandeis University	Waltham, MA	50,000
9/10/2015	547	New Jersey Conservation Foundation	Far Hills, NJ	10,000
9/10/2015	548	Nature Conservancy (NJ)	Pottersville, NJ	10,000
9/11/2015	553	HomeFirst	Plainfield, NJ	7,000
9/14/2015	549	Trinitas Health Foundation	Elizabeth, NJ	10,000
9/14/2015	551	ANJEC	Mendham, NJ	4,000
9/15/2015	543	JDRF	New York, NY	1,000
9/17/2015	550	Chamber Music Associates	New York, NY	3,000
9/17/2015	552	Trust for Public Land	Morristown, NJ	15,000
9/28/2015	554	Trust for Public Land	Morristown, NJ	25,000
			Total	776,341