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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](http://www.irs.gov/form990pf).

2015

Open to Public  
Inspection

For calendar year 2015, or tax year beginning 01-01-2015 , and ending 12-31-2015

<p>Name of foundation THE SOL GOLDMAN CHARITABLE TRUST % PERRY BEEK Number and street (or P O box number if mail is not delivered to street address) 1185 sixth avenue 10th floor  City or town, state or province, country, and ZIP or foreign postal code NEW YORK, NY 100362604</p>		<p><b>A Employer identification number</b> 13-3577310</p>			
		<p><b>B Telephone number (see instructions)</b> (212) 265-2280</p>			
<p><b>G Check all that apply</b> <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity  <input type="checkbox"/> Final return <input type="checkbox"/> Amended return  <input type="checkbox"/> Address change <input type="checkbox"/> Name change</p>		<p><b>C If exemption application is pending, check here</b> ►</p>			
<p><b>H Check type of organization</b> <input type="checkbox"/> Section 501(c)(3) exempt private foundation  <input checked="" type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation</p>		<p><b>D 1. Foreign organizations, check here</b> ►</p>			
<p><b>I Fair market value of all assets at end of year (from Part II, col (c), line 16) ► \$ 100,565,930</b></p>		<p><b>E If private foundation status was terminated under section 507(b)(1)(A), check here</b> ►</p>			
<p><b>J Accounting method</b> <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual  <input type="checkbox"/> Other (specify) _____</p>		<p><b>F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here</b> ►</p>			
<p><b>Part I Analysis of Revenue and Expenses</b> (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</p>					
Revenue	1 Contributions, gifts, grants, etc, received (attach schedule)	Revenue and expenses per books (a)	Net investment income (b)	Adjusted net income (c)	Disbursements for charitable purposes (d) (cash basis only)
	2 Check ► <input type="checkbox"/> if the foundation is <b>not</b> required to attach Sch B	0			
	3 Interest on savings and temporary cash investments	627,304	627,290		
	4 Dividends and interest from securities	2,133,912	2,133,912		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	985,682			
	b Gross sales price for all assets on line 6a 20,688,002				
	7 Capital gain net income (from Part IV, line 2)		985,682		
	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)	20,340	15,184			
12 <b>Total</b> .Add lines 1 through 11	3,767,238	3,762,068			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	84,058	8,406	0	75,652
	b Accounting fees (attach schedule)	21,410	2,141	0	19,269
	c Other professional fees (attach schedule)	171,476	171,476		
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	53,005	8,005		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	40,584	36,122		1,500
	24 <b>Total operating and administrative expenses.</b>	370,533	226,150	0	96,421
25 Contributions, gifts, grants paid	6,506,000			6,506,000	
26 <b>Total expenses and disbursements.</b> Add lines 24 and 25	6,876,533	226,150	0	6,602,421	
27 Subtract line 26 from line 12					
a <b>Excess of revenue over expenses and disbursements</b>	-3,109,295				
b <b>Net investment income</b> (if negative, enter -0-)		3,535,918			
c <b>Adjusted net income</b> (if negative, enter -0-)					

	<b>Part II Balance Sheets</b> 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
<b>Assets</b>	1 Cash—non-interest-bearing . . . . .	152,416	283,557	283,557
	2 Savings and temporary cash investments . . . . .	1,213,605	771,400	771,400
	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)	22,595,159	20,242,613	20,279,985
	b Investments—corporate stock (attach schedule) . . . . .	46,770,131	43,817,197	60,803,026
	c Investments—corporate bonds (attach schedule) . . . . .	15,025,176	17,254,594	17,743,266
	11 Investments—land, buildings, and equipment basis ► _____			
Less accumulated depreciation (attach schedule) ► _____				
12 Investments—mortgage loans . . . . .				
13 Investments—other (attach schedule) . . . . .	631,287	913,223	679,486	
14 Land, buildings, and equipment basis ► _____				
Less accumulated depreciation (attach schedule) ► _____				
15 Other assets (describe ► _____)	9,315	5,210	5,210	
<b>16 Total assets</b> (to be completed by all filers—see the instructions Also, see page 1, item I)	86,397,089	83,287,794	100,565,930	
<b>Liabilities</b>	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 ► _____)			
	<b>23 Total liabilities</b> (add lines 17 through 22) . . . . .	0		
<b>Net Assets or Fund Balances</b>	<b>Foundations that follow SFAS 117, check here ► <input type="checkbox"/></b> <b>and complete lines 24 through 26 and lines 30 and 31.</b>			
	24 Unrestricted . . . . .			
	25 Temporarily restricted . . . . .			
	26 Permanently restricted . . . . .			
	<b>Foundations that do not follow SFAS 117, check here ► <input checked="" type="checkbox"/></b> <b>and complete lines 27 through 31.</b>			
	27 Capital stock, trust principal, or current funds . . . . .			
	28 Paid-in or capital surplus, or land, bldg , and equipment fund	86,397,089	83,287,794	
	29 Retained earnings, accumulated income, endowment, or other funds			
	<b>30 Total net assets or fund balances</b> (see instructions) . . . . .	86,397,089	83,287,794	
	<b>31 Total liabilities and net assets/fund balances</b> (see instructions) . . . . .	86,397,089	83,287,794	

**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	86,397,089
2	Enter amount from Part I, line 27a . . . . .	2	-3,109,295
3	Other increases not included in line 2 (itemize) ► _____	3	
4	Add lines 1, 2, and 3 . . . . .	4	83,287,794
5	Decreases not included in line 2 (itemize) ► _____	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 . . . . .	6	83,287,794

**Part IV Capital Gains and Losses for Tax on Investment Income**

List and describe the kind(s) of property sold (e.g., real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)		How acquired (b) P—Purchase D—Donation	Date acquired (c) (mo, day, yr)	Date sold (d) (mo, day, yr)
<b>1 a</b>	L-T GAIN FROM PUBLICLY TRADED SECURITIES			
<b>b</b>	L-T GAIN FROM LP INVESTMENTS			
<b>c</b>	S-T GAIN FROM PUBLICLY TRADED SECURITIES			
<b>d</b>				
<b>e</b>				
<b>(e) Gross sales price</b>		<b>(f) Depreciation allowed (or allowable)</b>	<b>(g) plus expense of sale</b>	<b>Gain or (loss) (h) (e) plus (f) minus (g)</b>
<b>a</b>	15,068,698		14,302,660	766,038
<b>b</b>	209,278			209,278
<b>c</b>	5,410,026		5,399,660	10,366
<b>d</b>				
<b>e</b>				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
<b>(i) F M V as of 12/31/69</b>		<b>Adjusted basis (j) as of 12/31/69</b>	<b>Excess of col (i) over col (j), if any (k)</b>	<b>(l)</b>
<b>a</b>				766,038
<b>b</b>				209,278
<b>c</b>				10,366
<b>d</b>				
<b>e</b>				
<b>2</b>	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	<b>2</b>	985,682
<b>3</b>	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				<b>3</b>

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

Yes  No

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

<b>(a)</b> Base period years Calendar year (or tax year beginning in)	<b>(b)</b> Adjusted qualifying distributions	<b>(c)</b> Net value of noncharitable-use assets	<b>(d)</b> Distribution ratio (col (b) divided by col (c))
2014	6,795,306	104,697,357	0 064904
2013	6,702,669	100,257,552	0 066855
2012	4,889,079	94,378,058	0 051803
2011	5,736,229	92,760,671	0 061839
2010	4,467,000	93,730,430	0 047658
<b>2</b>	Total of line 1, column (d).		<b>2</b> 0 293059
<b>3</b>	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		<b>3</b> 0 058612
<b>4</b>	Enter the net value of noncharitable-use assets for 2015 from Part X, line 5.		<b>4</b> 101,245,459
<b>5</b>	Multiply line 4 by line 3.		<b>5</b> 5,934,199
<b>6</b>	Enter 1% of net investment income (1% of Part I, line 27b).		<b>6</b> 35,359
<b>7</b>	Add lines 5 and 6.		<b>7</b> 5,969,558
<b>8</b>	Enter qualifying distributions from Part XII, line 4.		<b>8</b> 6,602,421

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ► <input type="checkbox"/> and enter "N/A" on line 1	1	35,359
	Date of ruling or determination letter _____ <b>(attach copy of letter if necessary—see instructions)</b>		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ► <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b . . . . .		
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-) . . . . .	2	
3	Add lines 1 and 2. . . . .	3	35,359
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-) . . . . .	4	
5	<b>Tax based on investment income.</b> Subtract line 4 from line 3 If zero or less, enter -0- . . . . .	5	35,359
6	<b>Credits/Payments</b>		
a	2015 estimated tax payments and 2014 overpayment credited to 2015 . . . . .	6a	81,226
b	Exempt foreign organizations—tax withheld at source . . . . .	6b	
c	Tax paid with application for extension of time to file (Form 8868) . . . . .	6c	5,000
d	Backup withholding erroneously withheld . . . . .	6d	
7	Total credits and payments Add lines 6a through 6d. . . . .	7	86,226
8	Enter any <b>penalty</b> for underpayment of estimated tax Check here <input type="checkbox"/> If Form 2220 is attached . . . . .	8	
9	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b> . . . . . ►	9	
10	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b> . . . . . ►	10	50,867
11	Enter the amount of line 10 to be <b>Credited to 2015 estimated tax</b> ► 50,867 <b>Refunded</b> ►	11	

**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? <input checked="" type="checkbox"/> . . . . .		<b>Yes</b>	<b>No</b>
1b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? . . . . .		<b>Yes</b>	<b>No</b>
	<i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities</i>			
1c	Did the foundation file <b>Form 1120-POL</b> for this year? . . . . .		<b>Yes</b>	<b>No</b>
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year			
	(1) On the foundation ► \$ _____ (2) On foundation managers ► \$ _____			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ► \$ _____			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? . . . . .		<b>Yes</b>	<b>No</b>
	<i>If "Yes," attach a detailed description of the activities</i>			
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i> <input checked="" type="checkbox"/> . . . . .		<b>Yes</b>	<b>No</b>
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year? . . . . .		<b>Yes</b>	
b	If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year? . . . . .		<b>Yes</b>	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? . . . . .		<b>Yes</b>	<b>No</b>
	<i>If "Yes," attach the statement required by General Instruction T</i> <input checked="" type="checkbox"/>			
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? . . . . .		<b>Yes</b>	
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i> . . . . .		<b>Yes</b>	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions)			
	► NY			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation</i> . . . . .		<b>Yes</b>	
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 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i> . . . . .		<b>Yes</b>	<b>No</b>
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i> . . . . .		<b>Yes</b>	<b>No</b>

**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? Website address ►	13	Yes
14	The books are in care of ►PERRY BEEK Located at ►1185 SIXTH AVENUE 10TH FLOOR new york NY	Telephone no ►(212) 265-2280 ZIP+4 ►100362604	
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> —Check here . . . . . ►	15	
16	At any time during calendar year 2015, 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? 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 ►	16	Yes No

**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
<b>1a</b>	During the year did the foundation (either directly or indirectly)		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? . . . . .	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? . . . . .	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? . . . . .	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? . . . . .	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? . . . . .	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) . . . . .	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
<b>b</b>	If any answer is "Yes" to 1a(1)–(6), did <b>any</b> 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	
c	Organizations relying on a current notice regarding disaster assistance check here. . . . . ►		
<b>2</b>	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 2015? . . . . .	1c	No
<b>a</b>	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 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015? . . . . .	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
	If "Yes," list the years ► 20____, 20____, 20____, 20____		
<b>b</b>	Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to <b>all</b> years listed, answer "No" and attach statement—see instructions) . . . . .	2b	
c	If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here ► 20____, 20____, 20____, 20____		
<b>3a</b>	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? . . . . .	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No
<b>b</b>	If "Yes," did it have excess business holdings in 2015 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 2015) . . . . .	3b	
<b>4a</b>	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? . . . . .	4a	No
<b>b</b>	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2015? . . . . .	4b	

**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**  No

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	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Additional Data Table				

**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	Title, and average hours per week (b) devoted to position	(c) Compensation	Contributions to employee benefit plans and deferred compensation (d)	Expense account, (e) other allowances

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

**Part VIII** **Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**

**3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".**

## **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.

1	N/A	
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

1	NONE	
2		
All other program-related investments See instructions		
3		
<b>Total.</b> Add lines 1 through 3		

**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	100,892,885
b	Average of monthly cash balances. . . . .	1b	1,214,897
c	Fair market value of all other assets (see instructions). . . . .	1c	679,486
d	<b>Total</b> (add lines 1a, b, and c). . . . .	1d	102,787,268
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation). . . . .	1e	
2	Acquisition indebtedness applicable to line 1 assets. . . . .	2	0
3	Subtract line 2 from line 1d. . . . .	3	102,787,268
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions). . . . .	4	1,541,809
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3 Enter here and on Part V, line 4	5	101,245,459
6	<b>Minimum investment return.</b> Enter 5% of line 5. . . . .	6	5,062,273

**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	5,062,273
2a	Tax on investment income for 2015 from Part VI, line 5. . . . .	2a	35,359
b	Income tax for 2015 (This does not include the tax from Part VI ). . . . .	2b	178
c	Add lines 2a and 2b. . . . .	2c	35,537
3	Distributable amount before adjustments Subtract line 2c from line 1. . . . .	3	5,026,736
4	Recoveries of amounts treated as qualifying distributions. . . . .	4	
5	Add lines 3 and 4. . . . .	5	5,026,736
6	Deduction from distributable amount (see instructions). . . . .	6	
7	<b>Distributable amount</b> as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1. . . . .	7	5,026,736

**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	6,602,421
b	Program-related investments—total from Part IX-B. . . . .	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes. . . . .	2	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required). . . . .	3a	0
b	Cash distribution test (attach the required schedule). . . . .	3b	0
4	<b>Qualifying distributions.</b> Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	6,602,421
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	35,359
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4. . . . .	6	6,567,062

**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 2014	(c) 2014	(d) 2015
<b>1</b> Distributable amount for 2015 from Part XI, line 7				5,026,736
<b>2</b> Undistributed income, if any, as of the end of 2015			0	
<b>a</b> Enter amount for 2014 only. . . . .			0	
<b>b</b> Total for prior years 2013, 2012, 2011		0		
<b>3</b> Excess distributions carryover, if any, to 2015				
<b>a</b> From 2010. . . . .	0			
<b>b</b> From 2011. . . . .	913,102			
<b>c</b> From 2012. . . . .	632,878			
<b>d</b> From 2013. . . . .	1,770,983			
<b>e</b> From 2014. . . . .	1,705,110			
<b>f</b> <b>Total</b> of lines 3a through e. . . . .	5,022,073			
<b>4</b> Qualifying distributions for 2015 from Part XII, line 4 ► \$ 6,602,421			0	
<b>a</b> Applied to 2014, but not more than line 2a			0	
<b>b</b> Applied to undistributed income of prior years (Election required—see instructions). . . . .				
<b>c</b> Treated as distributions out of corpus (Election required—see instructions). . . . .				
<b>d</b> Applied to 2015 distributable amount. . . . .				5,026,736
<b>e</b> Remaining amount distributed out of corpus	1,575,685			
<b>5</b> Excess distributions carryover applied to 2015 (If an amount appears in column (d), the same amount must be shown in column (a))				
<b>6</b> <b>Enter the net total of each column as indicated below:</b>	6,597,758			
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5		0		
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b. . . . .		0		
<b>c</b> 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. . . . .				
<b>d</b> Subtract line 6c from line 6b Taxable amount—see instructions. . . . .		0		
<b>e</b> Undistributed income for 2014 Subtract line 4a from line 2a Taxable amount—see instructions. . . . .			0	
<b>f</b> Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015. . . . .				0
<b>7</b> 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). . . . .				
<b>8</b> Excess distributions carryover from 2010 not applied on line 5 or line 7 (see instructions). . . . .	0			
<b>9</b> <b>Excess distributions carryover to 2016.</b> Subtract lines 7 and 8 from line 6a. . . . .	6,597,758			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2011. . . . .	913,102			
<b>b</b> Excess from 2012. . . . .	632,878			
<b>c</b> Excess from 2013. . . . .	1,770,983			
<b>d</b> Excess from 2014. . . . .	1,705,110			
<b>e</b> Excess from 2015. . . . .	1,575,685			

**Part XIV Private Operating Foundations** (see instructions and Part VII-A, question 9)

<b>1a</b> If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2015, enter the date of the ruling. . . . . ►				
<b>b</b> Check box to indicate whether the organization is a private operating foundation described in section <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 4942(j)(5)				
<b>2a</b> Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed. . . . .				
<b>b</b> 85% of line 2a . . . . .				
<b>c</b> Qualifying distributions from Part XII, line 4 for each year listed. . . . .				
<b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities . . . . .				
<b>e</b> Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c . . . . .				
<b>3</b> Complete 3a, b, or c for the alternative test relied upon				
<b>a</b> "Assets" alternative test—enter				
(1) Value of all assets . . . . .				
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)				
<b>b</b> "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . . . .				
<b>c</b> "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 XV Supplementary 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))

NONE

**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

NONE

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

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

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

JANE GOLDMAN  
1185 sixth avenue 10th fl  
new york, NY 10036  
(212) 265-2280

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

THE FOUNDATION DOES NOT HAVE A FORMAL APPLICATION FORM. POTENTIAL GRANTEES ARE REQUIRED TO PROVIDE THE FOUNDATION DETAILS ON THE PURPOSE BEHIND THE GRANT AS WELL AS VERIFICATION OF THEIR TAX-EXEMPT STATUS

**c** Any submission deadlines

THERE ARE NO SUBMISSION DEADLINES

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

THERE ARE NO RESTRICTIONS OR LIMITATIONS ON AWARDS SUCH AS BY GEOGRAPHICAL AREAS, CHARITABLE FIELDS, KINDS OF INSTITUTIONS OR OTHER FACTORS

**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)				
<b>a Paid during the year</b> See Additional Data Table				
<b>Total . . . . .</b>			► 3a	6,506,000
<b>b Approved for future payment</b>				
<b>Total . . . . .</b>			► 3b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions )
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
<b>1</b> Program service revenue					
a					
b					
c					
d					
e					
f					
<b>g</b> Fees and contracts from government agencies					
<b>2</b> Membership dues and assessments. . . . .					
<b>3</b> Interest on savings and temporary cash investments . . . . .			14	627,304	
<b>4</b> Dividends and interest from securities. . . . .			14	2,133,912	
<b>5</b> Net rental income or (loss) from real estate					
a Debt-financed property. . . . .					
b Not debt-financed property. . . . .					
<b>6</b> Net rental income or (loss) from personal property . . . . .					
<b>7</b> Other investment income. . . . .					
<b>8</b> Gain or (loss) from sales of assets other than inventory . . . . .			18	985,682	
<b>9</b> Net income or (loss) from special events					
<b>10</b> Gross profit or (loss) from sales of inventory					
<b>11</b> Other revenue a MISCELLANEOUS INCOME			01	15,375	
b PORTFOLIO INCOME FROM LP INVESTMENTS	523000	5,156	18	-191	
c					
d					
e					
<b>12</b> Subtotal Add columns (b), (d), and (e). . . . .		5,156		3,762,082	
<b>13</b> Total Add line 12, columns (b), (d), and (e). . . . .					3,767,238
(See worksheet in line 13 instructions to verify calculations.)					

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



**Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation**

<b>(a)</b> Name and address	<b>(b)</b> Title, and average hours per week devoted to position	<b>(c)</b> Compensation (If not paid, enter -0-)	<b>(d)</b> Contributions to employee benefit plans and deferred compensation	<b>(e)</b> Expense account, other allowances
jane h goldman	TRUSTEE 1 0	0	0	0
1185 sixth avenue 10th floor NEW YORK, NY 100362604				
allan h goldman	TRUSTEE 1 0	0	0	0
1185 sixth avenue 10th floor NEW YORK, NY 100362604				
louisa little	TRUSTEE 1 0	0	0	0
1185 sixth avenue 10th floor NEW YORK, NY 100362604				
Michael U Lewis	Trustee 1 0	0	0	0
1185 sixth avenue 10th floor NEW YORK, NY 100362604				
Benjamin H Lewis	Trustee 1 0	0	0	0
1185 sixth avenue 10th floor NEW YORK, NY 100362604				

## 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)				
<b>a Paid during the year</b>				
92ND STREET Y 1395 Lexington Avenue New York, NY 10128	NONE	PC	Community and cultural center	150,000
Amer Friends of Bshvilaych 1074 East 19th Street Brooklyn, NY 11230	NONE	PC	Preventative medical care, community education, research	50,000
BAYVILLE FIRE COMPANY 1 258 Bayville Ave Bayville, NY 11709	NONE	PC	free ambulance service	5,000
BOSTON MEDICAL LIBRARY 10 Shattuck St Boston, MA 02115	NONE	PC	advance quality of health and healthcare of people	3,000
BOSTON UNIVERSITY HILLEL HOUSE 213 Bay State Road Boston, MA 02215	NONE	PC	Promote Jewish culture	2,500
CAMP LOYALTOWN 115 E Bethpage Rd Bethpage, NY 11803	NONE	PC	A leading provider of services for individuals with intellectual and other developmental disabilities	5,000
CARING FOR CARCINOID FOUNDATION 198 Tremont St Boston, MA 02116	NONE	PC	Cares for Characinoioid cancer	10,000
CENTER FOR JEWISH HISTORY 15 W 16th St New York, NY 10022	NONE	PC	Promote Jewish culture	350,000
CENTRAL PARK CONSERVANCY 14 East 60th St New York, NY 10022	NONE	PC	Restore, manage and preserve Central Park	10,000
CHAI LIFELINE 151 W 30th St New York, NY 10023	NONE	PC	Offers a number of services for Jewish children with life threatening illness	50,000
CHILDREN AT HEART 675 Third Avenue Suite 3210 New York, NY 10017	NONE	PC	Not-for-profit organization that evacuates children from the radioactive Chernobyl region and provides them with critical medical care, new homes, and an excellent education	25,000
CITY HARVEST INC 575 8th Ave 4th Fl New York, NY 10018	NONE	PC	Feeding city's hungry men, women and children individuals to improveglobal health and wellness	150,000
CLINTON FOUNDATION 1271 Avenue of the Americas 42nd f New York, NY 10020	NONE	PC	Convene businesses, governments, NGOs, and individuals to improveglobal health and wellness	1,000,000
COLUMBIA UNIVERSITY 535 W116th St New York, NY 10027	NONE	PC	Educational	500,000
COMBINED JEWISH PHILANTHROPIES 126 High St Boston, MA 02110	NONE	PC	Fulfill needs and aspirations of Boston's Jewish community	1,500
<b>Total . . . . .</b>			<b>► 3a</b>	<b>6,506,000</b>

**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)				
<b>a Paid during the year</b>				
CONGREGATION MISHKAN TEFILA 300 Hammond Pond Parkway Chestnut Hill, MA 02467	NONE	PC	Religious	5,000
CRADLES TO CRAYONS INC 155 N Beacon St Brighton, MA 02135	NONE	PC	provides children from birth to age 12, living in low- income and homeless situations, with the essential items	5,000
DWIGHT-ENGLEWOOD SCHOOL 315 East Palisade Avenue Englewood, NJ 076313146	NONE	PC	Educational	25,000
ENGLEWOOD HOSPITAL 350 Engle St Englewood, NJ 07631	NONE	PC	Hospital	10,000
GANN ACADEMY 333 Forest Street Waltham, MA 02452	NONE	PC	Educational	10,000
GREAT NECK PUBLIC SCHOOLS 345 Lakeville Road Great Neck, NY 11020	NONE	GOV	Educational	10,000
HEALTHCORPS 191 7th Ave 2N New York, NY 10011	NONE	PC	Empower Americas youth and families to eat smart and stay active	25,000
HILLEL 800 Eight St NW Washington, DC 20001	NONE	PC	Promote Jewish culture	50,000
JEWISH CENTER OF THE HAMPTONS 44 Woods Lane East Hampton, NY 11937	NONE	PC	Religious	100,000
JEWISH COMMUNITY CENTER OF 333 Nahanton St Newton, MA 02459	NONE	PC	Community Services	10,000
JEWISH FAMILY AND CHILDREN'S 1340 Center St Newton, MA 02459	NONE	PC	Community Services	20,000
JEWISH FEDERATION OF NORTHERN 50 Eisenhower Drive Paramus, NJ 07652	NONE	PC	Support Jewish education and continuity	28,000
KAPLEN JCC ON THE PALISADES 411 East Clinton Ave Tenafly, NJ 07670	NONE	PC	Organization for Jewish activity and identification	5,000
LOCUST VALLEY FIRE DEPARTMENT 228 Buckram Road Locust Valley, NY 11560	NONE	PC	Provides fire and rescue services treatment	10,000
LONG ISLAND UNIVERSITY 720 Northern Blvd Brookville, NY 11548	NONE	PC	Educational	10,000
<b>Total . . . . .</b>			<b>► 3a</b>	<b>6,506,000</b>

## 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
<b>a Paid during the year</b>				
MAKE-A WISH FOUNDATION OF METRO 4742 N24th St Suite 400 Phoenix, AZ 85016	NONE	PC	Enrich lives of children with severe injuries	25,000
MANNES COLLEGE 150 W85th St New York, NY 10024	NONE	PC	Educational	25,000
MAYO CLINIC JACKSONVILLE 4500 San Pablo Road Jacksonville, FL 32224	NONE	PC	Hospital	100,000
MICHAEL J FOX FOUNDATION PO Box 780 New York, NY 10008	NONE	PC	Cure Parkinson's disease	20,000
MILL NECK MANOR SCHOOL FOR THE DEAF 40 Frost Mill Road Mill Neck, NY 11765	NONE	PC	Educational	20,000
NATIONAL GEOGRAPHIC SOCIETY 61 Ave of the Americas New York, NY 10024	NONE	PC	scientific and educational	10,000
NEW ENGLAND CONNECTION FOR PKU PO Box 3235 Woburn, MA 01888	NONE	PC	Support and provide services for people with PKU and Allied disorders	3,000
NEW YORK BOTANICAL GARDEN 2900 Southern Blvd Bronx, NY 10458	NONE	PC	Environmental	750,000
NEW YORK CITY CENTER 130 West 56th St New York, NY 10019	NONE	PC	Make the finest in performance arts accessible to broadest possible audience	200,000
NEW YORK UNIVERSITY 665 Broadway New York, NY 10019	NONE	PC	Educational	10,000
NORTH SHORE UNIVERSITY HOSPITAL 300 Community D Manhasset, NY 11030	NONE	PC	Medical	30,000
NY TIMES NEEDIEST CASES FUND 4 Chase Metrotech Center 7th Fl Brooklyn, NY 11245	NONE	PC	general appeal for poor and help agencies solicit funds	20,000
OAK SQUARE YMCA OF GREATER 615 Washington St Brighton, MA 02135	NONE	PC	YMCA	10,000
OLD BROOKVILLE PBA HOLIDAY FUND PO Box 386 Glen Head, NY 11545	NONE	NC	Make holidays of the less fortunate a little brighter	10,000
OYSTER BAY FIRE DEPARTMENT 188 South Street Oyster Bay, NY 11771	NONE	PC	Provides fire and rescue services	5,000
<b>Total . . . . .</b>			<b>► 3a</b>	<b>6,506,000</b>

## 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
<b>a Paid during the year</b>				
PARKINSON'S DISEASE FOUNDATION 1359 Broadway New York, NY 10018	NONE	PC	Parkinson's disease research, education and public advocacy	30,000
PET RES-Q 24 West Railroad Avenue Tenafly, NJ 07670	NONE	PC	Pet ResQ Inc is a not for profit 501c3 organization dedicated to saving unwanted pets	5,000
SALK INSTITUTE 10010 North Torrey Pines Road La Jolla, CA 92037	NONE	PC	Fundamental research in biology	50,000
SOUTH HAMPTON HOSPITAL 240 Meeting House Ln Southampton, NY 11968	NONE	PC	medical	10,000
ST FRANCIS HOSPITAL 100 Port Washington Blvd Roslyn, NY 11576	NONE	PC	medical	20,000
STUYVESANT HIGH SCHOOL ALUMNI 345 Chambers St New York, NY 10282	NONE	PC	Alumni Association	20,000
SYRACUSE UNIVERSITY 900 South Crouse Ave Syracuse, NY 13244	NONE	PC	Educational	5,000
THE DANA FARBER CANCER INSTITUTE 450 Brookline Ave Boston, MA 02215	NONE	PC	Provide expert, compassionate care to children and adults with cancer while advancing the understanding, diagnosis, treatment, cure, and prevention of cancer and related diseases	10,000
American Friends of the Israel museum 500 Fifth Avenue Suite 254C New York, NY 10110	NONE	PC	Promote Jewish culture	100,000
THE RASHI SCHOOL 15 Walnut Park Newton, MA 02458	NONE	PC	Educational	10,000
THE SALVATION ARMY 120 W14th St New York, NY 10011	NONE	PC	Meet human needs	20,000
THE VALTARESE FOUNDATION INC 23-01 33rd St Astoria, NY 11105	NONE	PC	Helps people of the Valley of the Taro River	15,000
TUFTS UNIVERSITY HILLEL HOUSE 220 Packard Ave Medford, MA 02155	NONE	PC	Promote Jewish culture	18,000
TULANE UNIVERSITY 6823 St Charles Ave New Orleans, LA 70118	NONE	PC	Educational	10,000
UNITED STATES HOLOCAUST 60 East 42nd Street Suite 2540 New York, NY 10165	NONE	PC	Ensure the lessons of the Holocaust remain a moral compass for humanity	100,000
<b>Total . . . . .</b>			<b>► 3a</b>	<b>6,506,000</b>

**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)				
<b>a Paid during the year</b>				
UNIVERSITY OF ST ANDREWS AMERICAN Foundation Inc 1201 W peachtree Atlanta, GA 30309	NONE	PC	Educational	45,000
VANDERBILT UNIVERSITY 2301 Vanderbilt Place Nashville, TN 37235	NONE	PC	Educational	20,000
VISTA VOCATIONAL & LIFE SKILLS 1356 Old Clinton Rd Westbrook, CT 06498	NONE	PC	supporting individuals with disabilities	10,000
WNET 825 Eighth Avenue New York, NY 10019	NONE	PC	Delivers lifelong learning and meaningful experiences to our communities	60,000
WOUNDED WARRIOR PROJECT INC 4899 Belford Road Suite 300 Jacksonville, FL 32256	NONE	PC	Provide comfort to an injured warrior and their families	75,000
YALE UNIVERSITY 157 Church St New Haven, CT 06510	NONE	PC	Educational	2,000,000
<b>Total . . . . .</b>			► 3a	6,506,000

## TY 2015 Accounting Fees Schedule

**Name:** THE SOL GOLDMAN CHARITABLE TRUST

**EIN:** 13-3577310

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
GRANT THORNTON LLP	21,410	2,141		19,269

# **TY 2015 All Other Program Related Investments Schedule**

**Name:** THE SOL GOLDMAN CHARITABLE TRUST

**EIN:** 13-3577310

<b>Category</b>	<b>Amount</b>
NONE	

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

## **TY 2015 Depreciation Schedule**

**Name:** THE SOL GOLDMAN CHARITABLE TRUST

**EIN:** 13-3577310

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

## **TY 2015 Expenditure Responsibility Statement**

**Name:** THE SOL GOLDMAN CHARITABLE TRUST

**EIN:** 13-3577310

Grantee's Name	Grantee's Address	Grant Date	Grant Amount	Grant Purpose	Amount Expended By Grantee	Any Diversion By Grantee?	Dates of Reports By Grantee	Date of Verification	Results of Verification
See statement 12 attached						NO			

## TY 2015 Investments Corporate Bonds Schedule

**Name:** THE SOL GOLDMAN CHARITABLE TRUST

**EIN:** 13-3577310

<b>Name of Bond</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
JP MORGAN CHASE CORP BONDS	11,322,498	10,929,973
WELLS FARGO CORP BONDS	5,932,096	6,813,293

## TY 2015 Investments Corporate Stock Schedule

**Name:** THE SOL GOLDMAN CHARITABLE TRUST

**EIN:** 13-3577310

<b>Name of Stock</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
WELLS FARGO	21,977,132	31,273,602
JP MORGAN CHASE	16,730,064	23,024,053
FRANKLIN TEMP MUTUAL	5,110,001	6,505,371

## TY 2015 Investments Government Obligations Schedule

**Name:** THE SOL GOLDMAN CHARITABLE TRUST

**EIN:** 13-3577310

**US Government Securities - End of  
Year Book Value:**

20,242,613

**US Government Securities - End of  
Year Fair Market Value:**

20,279,985

**State & Local Government  
Securities - End of Year Book  
Value:**

**State & Local Government  
Securities - End of Year Fair  
Market Value:**

## TY 2015 Investments - Other Schedule

**Name:** THE SOL GOLDMAN CHARITABLE TRUST**EIN:** 13-3577310

<b>Category/ Item</b>	<b>Listed at Cost or FMV</b>	<b>Book Value</b>	<b>End of Year Fair Market Value</b>
LTD PARTNERSHIP INVESTMENTS	AT COST	913,223	679,486

## TY 2015 Legal Fees Schedule

**Name:** THE SOL GOLDMAN CHARITABLE TRUST

**EIN:** 13-3577310

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
PAUL, WEISS, RIFKIND, WHARTON,	84,058	8,406		75,652
& GARRISON, LLP				

## TY 2015 Other Assets Schedule

**Name:** THE SOL GOLDMAN CHARITABLE TRUST**EIN:** 13-3577310

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
ACCRUED INT & DIV RECEIVABLE	9,315	5,210	5,210

## TY 2015 Other Expenses Schedule

**Name:** THE SOL GOLDMAN CHARITABLE TRUST

**EIN:** 13-3577310

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
NYS CHARITY FILING FEE	1,500			1,500
EXPENSES FROM LP INVESTMENTS	39,084	36,122		

## TY 2015 Other Income Schedule

**Name:** THE SOL GOLDMAN CHARITABLE TRUST

**EIN:** 13-3577310

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Miscellaneous income	15,375	15,375	
Other income/loss from LP investments	4,965	-191	

## TY 2015 Other Professional Fees Schedule

**Name:** THE SOL GOLDMAN CHARITABLE TRUST

**EIN:** 13-3577310

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
INVESTMENT ADVISORY FEES	171,476	171,476		

## TY 2015 Taxes Schedule

**Name:** THE SOL GOLDMAN CHARITABLE TRUST**EIN:** 13-3577310

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	8,005	8,005		
FEDERAL EXCISE TAXES	45,000			

THE SOL GOLDMAN CHARITABLE TRUST EXPENDITURE  
RESPONSIBILITY REPORT TO IRS ON FORM 990-PF – FYE 12/31/2015

Attachment for IRS Form 990-PF for  
The Sol Goldman Charitable Trust  
*13-3577310*  
Response to Part VII-B(c.)

The Sol Goldman Charitable Trust claims exemption from the initial excise tax under I.R.C. §4945 because it maintained expenditure responsibility and hereby provides the statement required by Treas. Reg. § 53.4945-5(d)

1. The grantee is: Old Brookville PBA Holiday Fund;
2. the date of the grant was November 24, 2015; the total amount of the grant was \$10,000;
3. the funds will be expended exclusively for charitable purposes, including scientific research relating to biodiversity, horticulture and food production, and related educational projects.
4. the amounts expended by the grantee towards accomplishment of those purposes are \$10,000;
5. to the best of the Sol Goldman Charitable Trust's knowledge, the grantee has not diverted any portion of the funds (or any income therefrom) from the purpose of the grant;
6. the date of report received from the grantee is November 2016;
7. the Sol Goldman Charitable Trust has not undertaken an investigation of the grantee's reports because the Sol Goldman Charitable Trust has no reason to believe that those reports are of dubious accuracy or reliability; and
8. the grantee has certified to the Sol Goldman Charitable Trust that it has expended, for charitable and educational purposes, an amount equal to the value of the Grant not later than the end of the grantee's first taxable year after the taxable year in which the Grant was received, in accordance with the out-of-corpus rules of section 4942(g)(3) of the Code.