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

Name of foundation ROBERT & DALE ROSEN CHARITABLE FOUNDATION TR U/A 8/05/92		A Employer identification number 13-6997530	
Number and street (or P O box number if mail is not delivered to street address) 67 PECKSLAND ROAD		B Telephone number (see instructions) (203) 625-3162	
City or town, state or province, country, and ZIP or foreign postal code GREENWICH, CT 06831		C If exemption application is pending, check here	
G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here 2. Foreign organizations meeting the 85% test, check here and attach computation	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 69,372		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here	
J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis)			

Part I	Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))	Revenue and expenses per books (a)	Net investment income (b)	Adjusted net income (c)	Disbursements for charitable purposes (d) (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	73,504			
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	1,241	1,241		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	30,831			
	b Gross sales price for all assets on line 6a 159,346				
	7 Capital gain net income (from Part IV, line 2)		133,631		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	105,576	134,872		
	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule).				
	b Accounting fees (attach schedule).	3,700	3,700		0
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)				
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings.				
	22 Printing and publications				
	23 Other expenses (attach schedule).	3,004	1,004		0
	24 Total operating and administrative expenses. Add lines 13 through 23	6,704	4,704		0
	25 Contributions, gifts, grants paid	166,062			166,062
	26 Total expenses and disbursements. Add lines 24 and 25	172,766	4,704		166,062
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-67,190			
	b Net investment income (if negative, enter -0-)		130,168		
	c Adjusted net income (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	9,393	7,926	7,926
	2	Savings and temporary cash investments	418	603	603
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions).			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)			
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	89,126	29,813	60,843
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
Liabilities	15	Other assets (describe ▶ _____)	6,595	0	0
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	105,532	38,342	69,372
	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule).			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)	0	0	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds	208,988	208,988	
	28	Paid-in or capital surplus, or land, bldg, and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	-103,456	-170,646	
	30	Total net assets or fund balances (see instructions)	105,532	38,342	
	31	Total liabilities and net assets/fund balances (see instructions)	105,532	38,342	

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	105,532
2	Enter amount from Part I, line 27a	2	-67,190
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	38,342
5	Decreases not included in line 2 (itemize) ▶ _____	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	38,342

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 P—Purchase (b) D—Donation	Date acquired (c) (mo , day, yr)	Date sold (d) (mo , day, yr)
1a See Additional Data Table				
b				
c				
d				
e				

(e) Gross sales price	Depreciation allowed (f) (or allowable)	Cost or other basis (g) plus expense of sale	Gain or (loss) (h) (e) plus (f) minus (g)
a See Additional Data Table			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			Gains (Col (h) gain minus col (k), but not less than -0-) or (l) Losses (from col (h))
(i) F M V as of 12/31/69	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
a See Additional Data Table			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	133,631
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	

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

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)
If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No
If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2014	106,976	182,355	0.586636
2013	70,058	220,299	0.318013
2012	61,388	148,558	0.413226
2011	217,776	199,666	1.090701
2010	85,690	253,337	0.338245

2 Total of line 1, column (d).	2	2.746821
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.549364
4 Enter the net value of noncharitable-use assets for 2015 from Part X, line 5.	4	117,638
5 Multiply line 4 by line 3.	5	64,626
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	1,302
7 Add lines 5 and 6.	7	65,928
8 Enter qualifying distributions from Part XII, line 4.	8	166,062

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

Part VI

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

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		1	1,302
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	0
3 Add lines 1 and 2.		3	1,302
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	0
5 Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		5	1,302
6 Credits/Payments			
a 2015 estimated tax payments and 2014 overpayment credited to 2015	6a	1,974	
b Exempt foreign organizations—tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868).	6c	800	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments Add lines 6a through 6d.		7	2,774
8 Enter any penalty for underpayment of estimated tax Check here ☐ if Form 2220 is attached		8	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed ▶		9	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid . . . ▶		10	1,472
11 Enter the amount of line 10 to be Credited to 2015 estimated tax ▶ 1,472 Refunded ▶		11	0

Part VII-A

Statements Regarding Activities

1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	Yes	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities</i>	1b		No
c Did the foundation file Form 1120-POL for this year?	1c		No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ▶ \$ _____ 0 (2) On foundation managers ▶ \$ _____ 0			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ _____ 0			
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities</i>	2		No
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>	3		No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		No
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T</i>	5		No
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	7	Yes	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ CT			
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation</i> .	8b	Yes	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>	9		No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	10		No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ N/A	13	Yes	
14	The books are in care of ▶ TAXPAYER Telephone no ▶ (203) 625-3162 Located at ▶ 67 PECKSLAND ROAD GREENWICH CT ZIP+4 ▶ 06831			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here ▶ ☐ and enter the amount of tax-exempt interest received or accrued during the year ▶ 15	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	No 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
1a	During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐	1b		
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2015?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015? ☐ Yes ☒ No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 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		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2015?	4b		No

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (Continued)

5a

During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc , organization described in section 4945(d)(4)(A)? (see instructions).

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

b

If any answer is "Yes" to 5a(1)–(5), did **any**of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

5b

Organizations relying on a current notice regarding disaster assistance check here.

☐

c

If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945–5(d)

6a

Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

b

Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

No

If "Yes" to 6b, file Form 8870

7a

At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b

If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

7b

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

1

List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	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	Expense account, (e) other allowances
ROBERT L ROSEN	TRUSTEE	0	0	0
67 PECKSLAND ROAD GREENWICH,CT 06831	0 50			
DALE A ROSEN	TRUSTEE	0	0	0
67 PECKSLAND ROAD GREENWICH,CT 06831	0 50			

2

Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	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
NONE				

Total

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

0

Part VIII

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services. 0

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0

Part X Minimum Investment Return

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	104,162
b	Average of monthly cash balances.	1b	15,267
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	119,429
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	119,429
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	1,791
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	117,638
6	Minimum investment return. Enter 5% of line 5.	6	5,882

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	5,882
2a	Tax on investment income for 2015 from Part VI, line 5.	2a	1,302
b	Income tax for 2015 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	1,302
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	4,580
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	4,580
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	4,580

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	166,062
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	166,062
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	1,302
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	164,760

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
1 Distributable amount for 2015 from Part XI, line 7				4,580
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2015				
a From 2010.	73,439			
b From 2011.	209,825			
c From 2012.	55,017			
d From 2013.	59,508			
e From 2014.	99,636			
f Total of lines 3a through e.	497,425			
4 Qualifying distributions for 2015 from Part XII, line 4 ► \$ 166,062				
a Applied to 2014, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2015 distributable amount.				4,580
e Remaining amount distributed out of corpus	161,482			
5 Excess distributions carryover applied to 2015 (If an amount appears in column (d), the same amount must be shown in column (a))	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	658,907			
b Prior years' undistributed income Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2014 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015.				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2010 not applied on line 5 or line 7 (see instructions). . .	73,439			
9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a.	585,468			
10 Analysis of line 9				
a Excess from 2011. . . .	209,825			
b Excess from 2012. . . .	55,017			
c Excess from 2013. . . .	59,508			
d Excess from 2014. . . .	99,636			
e Excess from 2015. . . .	161,482			

Part XIV

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

1a

If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2015, enter the date of the ruling.

b

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

2a

Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

Tax year	Prior 3 years			(e) Total
(a) 2015	(b) 2014	(c) 2013	(d) 2012	
b 85% of line 2a				
c Qualifying distributions from Part XII, line 4 for each year listed				
d Amounts included in line 2c not used directly for active conduct of exempt activities				
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c				

3

Complete 3a, b, or c for the alternative test relied upon

a

"Assets" alternative test—enter

(1)

Value of all assets

(2)

Value of assets qualifying under section 4942(j)(3)(B)(i)

b

"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.

c

"Support" alternative test—enter

(1)

Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

(2)

Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).

(3)

Largest amount of support from an exempt organization

(4)

Gross investment income

Part 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))

See Additional Data Table

b

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

2

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

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

a

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

b

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

c

Any submission deadlines

d

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

Form 990-PF (2015)

Part XV

Supplementary Information(continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	166,062
b Approved for future payment				
Total			3b	0

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2015)

Part XVII

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			Yes	No
a Transfers from the reporting foundation to a noncharitable exempt organization of				
(1) Cash.		1a(1)		No
(2) Other assets.		1a(2)		No
b Other transactions				
(1) Sales of assets to a noncharitable exempt organization.		1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization.		1b(2)		No
(3) Rental of facilities, equipment, or other assets.		1b(3)		No
(4) Reimbursement arrangements.		1b(4)		No
(5) Loans or loan guarantees.		1b(5)		No
(6) Performance of services or membership or fundraising solicitations.		1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.		1c		No
d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received				

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes
☒ No

b If "Yes," complete the following schedule

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

Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge				
	***** _____ Signature of officer or trustee	2016-11-07 _____ Date	***** _____ Title	May the IRS discuss this return with the preparer shown below (see instr)? ☒ Yes ☐ No	
Paid Preparer Use Only	Print/Type preparer's name ALAN G BADEY CPA	Preparer's Signature 	Date 	Check if self-employed ☐	PTIN P00666263
	Firm's name ☐ CITRIN COOPERMAN & COMPANY LLP			Firm's EIN ☐ 22-2428965	
	Firm's address ☐ 709 WESTCHESTER AVENUE WHITE PLAINS, NY 10604			Phone no (914) 949-2990	

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

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)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
50 SH DISCOVERY COMMUNICATIONS SER A		2012-09-19	2015-06-18
150 SH DISCOVERY COMMUNICATIONS SER A		2012-09-19	2015-11-06
50 SH DISCOVERY COMMUNICATIONS SER C		2012-09-19	2015-06-18
50 SH ENTERPRISE PRODUCTS PARTNERS LP		2014-11-19	2015-10-06
100 SH ENTERPRISE PRODUCTS PARTNERS LP		2014-11-19	2015-06-18
150 SH ENTERPRISE PRODUCTS PARTNERS LP		2014-11-19	2015-10-20
25 SH EOG RES INC		2012-09-19	2015-10-06
5 SH GILEAD SCIENCES INC		2014-11-20	2015-11-06
25 SH GILEAD SCIENCES INC		2014-11-20	2015-06-18
50 SH GILEAD SCIENCES INC0		2014-11-20	2015-09-21

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
1,690		725	965
4,393		2,175	2,218
1,588			1,588
1,442		426	1,016
3,172		852	2,320
4,200		1,278	2,922
2,068		397	1,671
535		91	444
3,033		455	2,578
5,245		910	4,335

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			965
			2,218
			1,588
			1,016
			2,320
			2,922
			1,671
			444
			2,578
			4,335

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

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)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
35 SH INTERNATIONAL BUSINESS MACHINES CORP		2001-05-11	2015-09-21
15 SH JOHNSON & JOHNSON		2007-04-19	2015-09-22
25 SH JOHNSON & JOHNSON		2007-04-19	2015-06-18
5 SH REGENERON PHARMACEUTICALS INC		2012-10-02	2015-09-22
5 SH REGENERON PHARMACEUTICALS INC		2012-10-02	2015-10-06
10 SH REGENERON PHARMACEUTICALS INC		2012-10-02	2015-06-18
10 SH REGENERON PHARMACEUTICALS INC		2012-10-02	2015-09-21
125 SH REGENERON PHARMACEUTICALS INC		2015-07-21	2015-07-21
1,500 SH SAPIENT CORP		2010-09-15	2015-02-09

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
5,121		2,473	2,648
1,389		1,045	344
2,508		1,741	767
2,629		392	2,237
2,267		392	1,875
5,292		784	4,508
5,294		784	4,510
69,980		2,056	67,924
37,500		8,739	28,761

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			2,648
			344
			767
			2,237
			1,875
			4,508
			4,510
			67,924
			28,761

Form 990PF Part XV Line 1a - List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000).

ROBERT L ROSEN

DALE A ROSEN

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ADOPT-A-DOG 849 LAKE AVENUE GREENWICH,CT 06831	NONE	PUBLIC	TO FIND SAFE AND PERMANENT HOMES FOR COMPANION ANIMALS	50
AMERICAN CANCER SOCIETY NEW ENGLAND DIVISION INC / LOWER FAIRFIELD UNIT PO BOX 907 WALLINGFORD,CT 06492	NONE	PUBLIC	TO SUPPORT THE MISSION TO ELIMINATE CANCER	400
ARF (ANIMAL RESCUE FOUNDATION) PO BOX 30215 WALNUT CREEK,CA 94598	NONE	PUBLIC	RESCUING AND ADOPTING ANIMALS	300
ART BEYOND SIGHT 589 BROADWAY NEW YORK,NY 10012	NONE	PUBLIC	TO MAKE ART,ART HISTORY, AND VISUAL CULTURE ACCESSIBLE TO PEOPLE WHO ARE BLIND OR VISUALLY IMPAIRED	500
BREAST CANCER ALLIANCE 48 MAPLE AVENUE GREENWICH,CT 06830	NONE	PUBLIC	BREAST CANCER RESEARCH	500
COUNCIL ON FOREIGN RELATIONS INC 58 EAST 68TH STREET NEW YORK,NY 10065	NONE	PUBLIC	TO ASSIST WITH EFFORTS TO RAISE THE LEVEL OF FOREIGN AWARENESS	28,680
GREENWICH LIBRARY 101 WEST PUTNAM AVENUE GREENWICH,CT 06830	NONE	PUBLIC	TO SUPPORT THE TOWN LIBRARY WITH FUNDS	500
HOSPITAL FOR SPECIAL SURGERY 535 E 70TH STREE NEW YORK,NY 10021	NONE	PUBLIC	SUPPORTING DR FARMER'S RESEARCH IN ORTHOPEDIC SPINE CONDITIONS	1,000
HUMAN RIGHTS FIRST 333 SEVENTH AVENUE 13TH FLOOR NEW YORK,NY 10001	NONE	PUBLIC	INDEPENDENT ADVOCACY AND ACTION ORGANIZATION THAT CHALLENGES AMERICA TO LIVE UP TO ITS IDEALS	250
JUMPSTART FOR YOUNG CHILDREN 308 CONGRESS STREET 6TH FLOOR BOSTON,MA 02210	NONE	PUBLIC	HELP CHILDREN DEVELOP LANGUAGE AND LITERACY SKILLS	11,810
NEW YORK PHILHARMONIC AVERY FISHER HALL 10 LINCOLN CENTER PLAZA NEW YORK,NY 10023	NONE	PUBLIC	TO SUPPORT EDUCATIONAL PROGRAMS	5,000
NYU STERN 44 WEST FOURTH STREET ROOM 10-46 NEW YORK,NY 10012	NONE	PUBLIC	TO SUPPORT THE EDUCATIONAL PROGRAMS IN THE BUSINESS SCHOOL	25,000
OBLITERIDE PO BOX 19024 1100 FAIRVIEW AVE N LM-120 SEATTLE,WA 98109	NONE	PUBLIC	TO CONNECT CANCER SURVIVORS, CYCLISTS, AND COMMUNITY MEMBERS TO RAISE MONEY FOR CANCER RESEARCH AT THE FRED HUTCHINSON CANCER RESEARCH CENTER	100
PFLAG 1828 L STREET NW SUITE 660 WASHINGTON,DC 20036	NONE	PUBLIC	TO PROMOTE THE HEALTH AND WELL-BEING OF LESBIAN, GAY, BISEXUAL, AND TRANSGENDER PERSONS, THEIR FAMILIES, AND THEIR FRIENDS THROUGH SUPPORT TO COPE WITH AN ADVERSE SOCITEY, EDUCATION TO ENLIGHTEN AN ILL-INFORMED PUBLIC, AND ADVOCACY TO END DISCRIMINATION AND TO SECURE EQUAL CIVIL RIGHTS	300
PREP FOR PREP 328 W 71ST STREET NEW YORK,NY 10023	NONE	PUBLIC	A LEADERSHIP PROGRAM THAT OFFERS STUDENTS OF COLOR ACCESS TO A PRIVATE SCHOOL EDUCATION	2,000
Total ▶ 3a				166,062

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ROUND HILL ASSOCIATION 397 ROUND HILL ROAD GREENWICH,CT 06831	NONE	PUBLIC	TO SUPPORT IMPROVEMENTS IN THE GREENWICH COMMUNITY	200
SISTERHOOD OF TEMPLE SHALOM 300 EAST PUTNAM AVENUE GREENWICH,CT 06830	NONE	PUBLIC	TO SUPPORT THE YOUTH, EDUCATION, AND SPECIAL PROJECTS	110
TEACHERS COLLEGE FUND BOX 306 525 W 120TH STREET NEW YORK,NY 10027	NONE	PUBLIC	TO PROVIDE SUPPORT FOR SCHOLARSHIPS FOR DESERVING STUDENTS, FACULTY DEVELOPMENT AND RESEARCH, FACULTY RECRUITMENT, TECHNOLOGICAL INNOVATIONS AND EDUCATION PROGRAMS	10,000
TEMPLE SHOLOM 300 EAST PUTNAM AVENUE GREENWICH,CT 06830	NONE	PUBLIC	SUPPORT THE TEMPLE AND ITS PROGRAMS	20,115
THE CENTER FOR DISCOVERY PO BOX 840 HARRIS,NY 12742	NONE	PUBLIC	TO SUPPORT THE HEALTH, EDUCATIONAL AND RESIDENTIAL SERVICES PROVIDED TO CHILDREN AND ADULTS WITH SEVERE DISABILITIES AND MEDICAL FRAILTIES	5,000
THE GOOD DOG FOUNDATION PO BOX 1484 NEW YORK,NY 10276	NONE	PUBLIC	TO HELP PROMOTE THE USE OF ANIMAL-ASSISTED THERAPY	100
THE OPPORTUNITY NETWORK 381 PARK AVENUE SOUTH SUITE 1401 NEW YORK,NY 10016	NONE	PUBLIC	TO HELP CREATE OPPORTUNITES FOR HIGH-ACHIEVING, UNDERSERVED HIGH SCHOOL AND COLLEGE STUDENTS BY CREATING ACCESS FOR THEM TO CAREER OPPORTUNITIES, PROFESSIONAL NETWORKS AND COMPETITIVE COLLEGES	500
UJA FEDERATION-GREENWICH ONE HOLLY HILL LANE GREENWICH,CT 06830	NONE	PUBLIC	HELP INSPIRE A PASSION FOR JEWISH LIFE AND LEARNING	2,000
WHITNEY MUSEUM 945 MADISON AVENUE NEW YORK,NY 10021	NONE	PUBLIC	DEDICATED TO COLLECTING, PRESERVING, INTERPRETING, AND EXHIBITING AMERICAN ART	125
WORLD OF CHILDREN 6200 STONERIDGE MALL ROAD 3RD FLOOR PLEASANTON,CA 94588	NONE	PUBLIC	PROVIDES FUNDING AND RECOGNITION TO SUPPORT LIFE-CHANGING WORK FOR CHILDREN	2,500
YWCA OF GREENWICH 259 EAST PUTNAM AVENUE GREENWICH,CT 06830	NONE	PUBLIC	TO ENHANCE THE LIVES OF WOMEN, MEN, AND CHILDREN WITH A VARIETY OF PROGRAMS	100
AG BELL 3417 VOLTA PLACE NW WASHINGTON,DC 20007	NONE	PUBLIC	TO SUPPORT THE MISSION OF ADVANCING LISTENING AND SPOKEN LANGUAGE FOR INDIVIDUALS WHO ARE DEAF AND HARD OF HEARING	350
ALZHEIMER FOUNDATION 322 EIGHTH AVE 7TH FLOOR NEW YORK,NY 10001	NONE	PUBLIC	TO PROVIDE OPTIMAL CARE AND SERVICES TO INDIVIDUALS CONFRONTING DEMENTIA AND ALSO TO THEIR CAREGIVERS AND FAMILIES	200
CAMP HILL FOUNDATION 285 HUNGRY HOLLOW RD CHESTNUT RIDGE,NY 10977	NONE	PUBLIC	CAMPHILL IS AN INTERNATIONAL MOVEMENT OF INTENTIONAL COMMUNITIES DESIGNED TO MEET THE NEEDS OF CHILDREN, YOUTH AND ADULTS WITH DEVELOPMENTAL DISABILITIES THROUGH A COMBINATION OF COMMUNITY LIFE, THE ARTS AND WORK ON THE LAND	100
CHABAD OF GREENWICH 75 MASON ST GREENWICH,CT 06830	NONE	PUBLIC	TO SUPPORT A BRANCH OF THE WORLDWIDE CHABAD LUBAVITCH MOVEMENT, FOUNDED BY THE REBBE TO SUPPORT A COMMUNITY THAT WELCOMES PEOPLE OF DIVERSE JEWISH BACKGROUNDS AND ALL AGES TO SUPPORT A SYNAGOGUE CENTER THAT PROVIDES EDUCATIONAL OPPORTUNITIES AND SOCIAL SERVICES IN A NON-JUDGMENTAL ENVIRONMENT	1,000
Total ▶ 3a				166,062

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
DREPUNG LOSELING MONASTERY 1781 DRESDEN DR NE ATLANTA,GA 30319	NONE	PUBLIC	TO CONTRIBUTE TO NORTH AMERICAN CULTURE BY PROVIDING THEORETICAL KNOWLEDGE AND PRACTICAL TRAINING IN TIBETAN BUDDHIST SCHOLARLY TRADITIONS FOR WESTERN STUDENTS, SCHOLARS AND THE GENERAL PUBLIC	100
GIFF INC 55 OLD FIELD POINT RD GREENWICH,CT 06830	NONE	PUBLIC	TO PROVIDE FILMMAKERS WITH AN EFFECTIVE PLATFORM TO SHOWCASE THEIR WORK WITH THE GOAL OF FINDING FINANCING OPPORTUNITIES FOR FUTURE PROJECTS	1,000
JEWISH COMMUNITY CENTER OF HARRISON 130 UNION AVENUE HARRISON,NY 10528	NONE	PUBLIC	TO SUPPORT A COMMUNITY SYNAGOGUE THAT IS DEDICATED TO EDUCATIONAL AND RECREATIONAL ENRICHMENT TO SUPPORT THE EARLY CHILDHOOD CENTER THAT IS IS PREMISED ON THE NOTION THAT PLAY IS THE MOST IMPORTANT "WORK" OF THE YOUNG CHILD TO SUPPORT THE RELIGIOUS SCHOOL NOT ONLY TRAINS OUR YOUNGER CONGREGANTS FOR B'NAI MITZVOT, BUT ALSO FOR A LIFE GUIDED BY THE JEWISH VALUES OF JUSTICE (TZEDEK), REPAIRING THE WORLD (TIKKUN OLAM), ACTS OF LOVING KINDNESS (GEMIULUT HESED) AND JEWISH PEOPLEHOOD (KLAL YISRAEL)	1,000
KENT PRESENTS INC PO BOX 648 KENT,CT 06757	NONE	PUBLIC	SHARING AND DISSEMINATING GREAT IDEAS, AND SUPPORTING LOCAL CHARITIES THAT SERVE PEOPLE IN NEED	2,500
LEXINGTON SCHOOL FOR THE DEAF FOUNDATION 25-26 75TH STREET EAST ELMHURST,NY 11370	NONE	PUBLIC	TO COLLABORATE WITH THE DEAF AND HARD OF HEARING TO REALIZE THEIR FULL POTENTIAL IN BOTH THE DEAF AND HARD OF HEARING WORLDS, AND TAKE A LEADING POSITION IN CONCERT WITH THE DEAF AND HARD OF HEARING COMMUNITIES IN ARTICULATING THE MULTIFACETED CHALLENGES, OPPORTUNITIES, AND NEEDS FOR SERVICES OF THE DEAF AND HARD OF HEARING	162
MARYMOUNT SCHOOL 1026 FIFTH AVENUE NEW YORK,NY 10028	NONE	PUBLIC	TO SUPPORT THE MISSION THAT SEEKS TO EDUCATE YOUNG WOMEN WHO CONTINUE TO QUESTION, RISK, AND GROW, YOUNG WOMEN WHO CARE, SERVE, AND LEAD, YOUNG WOMEN PREPARED TO CHALLENGE, SHAPE, AND CHANGE THE WORLD	100
METROPOLITAN MUSEUM OF ART 1000 FIFTH AVENUE NEW YORK,NY 10028	NONE	PUBLIC	TO ASSIST IN MEETING THE ENORMOUS COST OF PROVIDING OUR PROGRAMS AND SERVICES TO AUDIENCES WORLDWIDE, TO HELP KEEP EXHIBITIONS OPEN, PROTECT THE COLLECTION, AND SUPPORT EDUCATION PROGRAMS	210
MILLTOWN SCHOOL DISTRICT 80 VIOLET TERRACE MILLTOWN,NJ 08850	NONE	PUBLIC	TO PROVIDE A SAFE, CARING, AND STIMULATING LEARNING ENVIRONMENT FOR ALL CHILDREN OUR TEACHERS AND SUPPORT STAFF ARE COMMITTED TO STUDENT SUCCESS	250
MT SINAI MEDICAL CENTER FOUNDATION 4300 ALTON ROAD MIAMI BEACH,FL 33140	NONE	PRIVATE	TO SUPPORT A NOT-FOR-PROFIT HOSPITAL WHERE JEWISH PHYSICIANS CAN PRACTICE MEDICINE AND ALL PERSONS REGARDLESS OF "RACE, CREED OR COLOR" COULD RECEIVE HIGH QUALITY MEDICAL CARE TO MEET THE PUBLIC'S EXPECTATION FOR QUALITY MEDICINE, REGARDLESS OF A PATIENT'S ABILITY TO PAY, MOUNT SINAI MEDICAL CENTER FOUNDATION PRESERVES THE HOSPITAL'S RICH TRADITION OF PHILANTHROPY AND COMMUNITY SUPPORT	5,000
MUSIC CONSERVATORY OF WESTCHESTER 216 CENTRAL AVENUE WHITE PLAINS,NY 10601	NONE	PUBLIC	TO SUPPORT THE LARGEST MUSIC ORGANIZATION IN THE WESTCHESTER, NY REGION, SERVING 2,500 STUDENTS EACH YEAR 800 WHO ATTEND LESSONS AND CLASSES AND 1,700 WHO PARTICIPATE IN OUTREACH PROGRAMS	500
NEIGHBOR TO NEIGHBOR 248 EAST PUTNAM AVE GREENWICH,CT 06830	NONE	PUBLIC	TO SUPPORT THREE DIFFERENT FOOD PROGRAMS AND A CLOTHING PROGRAM A FREE WEEKLY SUPPLEMENT OF THREE DAYS' WORTH OF FOOD FOR EACH MEMBER OF A FAMILY IS AVAILABLE TO ELIGIBLE GREENWICH RESIDENTS ONE-TIME EMERGENCY FOOD IS AVAILABLE TO RESIDENTS OF STAMFORD AND PORT CHESTER A WEEKLY SUMMER SUPPLEMENT IS AVAILABLE TO ELIGIBLE GREENWICH STUDENTS CLOTHING, LINENS AND SMALL HOUSEHOLD ITEMS ARE AVAILABLE TO ELIGIBLE RESIDENTS OF GREENWICH, STAMFORD AND PORT CHESTER	100
NEW YORK UNIVERSITY 25 WEST FOURTH STREET 4TH FLOOR NEW YORK,NY 10012	NONE	PUBLIC	TO RAISE MONEY FOR SCHOLARSHIPS FOR DESERVING STUDENTS, TO PROVIDE FACULTY WITH THE RESOURCES NEEDED TO PERFORM CRITICAL RESEARCH, TO PROVIDE MEDICAL AND NURSING STUDENTS WITH ACCESS TO THE MOST UP TO DATE EQUIPMENT AND TECHNOLOGY	35,000
PALLADIUM MUSICUM INC 6 STANWICH ROAD GREENWICH,CT 06830	NONE	PUBLIC	A NON-PROFIT ORGANIZATION DEVOTED TO CELEBRATING CLASSICAL MUSIC INTERNATIONALLY AS AN EXPRESSION OF CULTURE, THE ARTS, AND THE SACRED, EXPERIENCED IN AN INTIMATE SETTING	130
PAN MASS CHALLENGE 77 4TH AVENUE NEEDHAM,MA 02494	NONE	PUBLIC	TO RAISE MONEY FOR LIFE-SAVING CANCER RESEARCH AND TREATMENT AT DANA-FARBER CANCER INSTITUTE THROUGH AN ANNUAL BIKE-A-THON THAT CROSSES THE COMMONWEALTH OF MASSACHUSETTS	150
PINK AID PO BOX 5157 WESTPORT,CT 06881	NONE	PUBLIC	TO HELP UNDERSERVED LOCAL WOMEN SURVIVE BREAST CANCER TREATMENT WITH SUPPORT AND DIGNITY, TO PROVIDE SCREENING TO WOMEN IN FINANCIAL NEED, AND TO EMPOWER BREAST CANCER SURVIVORS TO HEAL BY HELPING AND INSPIRING OTHERS	250
Total ► 3a				166,062

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
SUCCEED 2GETHER PO BOX 1355 MONTCLAIR,NJ 07042	NONE	PUBLIC	PROVIDE COMMUNITY SUPPORT FOR LOW-INCOME FAMILIES STRUGGLING TO MEET DAILY NEEDS IN RESPONSE TO CUTBACKS IN COMMUNITY SUPPORT, CURRENTLY SERVE OVER 240 STUDENTS WITH EDUCATIONAL PROGRAMS THAT FOCUS ON CLOSING THE OPPORTUNITY GAP AND ULTIMATELY CLOSING THE ACHIEVEMENT GAP THROUGH DIFFERENT PROGRAMS	200
THE ASIA FOUNDATION 465 CALIFORNIA STREET 9TH FLOOR SAN FRANCISCO,CA 94104	NONE	PUBLIC	TO SUPPORT A NONPROFIT INTERNATIONAL DEVELOPMENT ORGANIZATION COMMITTED TO IMPROVING LIVES ACROSS ASIA, TO ADDRESS THE CRITICAL ISSUES AFFECTING ASIA IN THE 21ST CENTURY BY STRENGTHENING GOVERNANCE, EXPANDING ECONOMIC OPPORTUNITY, INCREASING ENVIRONMENTAL RESILIENCE, EMPOWERING WOMEN, AND PROMOTING INTERNATIONAL COOPERATION	300
THE ASIA SOCIETY 725 PARK AVENUE NEW YORK,NY 10021	NONE	PUBLIC	TO PROMOTE MUTUAL UNDERSTANDING AND STRENGTHEN PARTNERSHIPS AMONG PEOPLES, LEADERS AND INSTITUTIONS OF ASIA AND THE UNITED STATES IN A GLOBAL CONTEXT ACROSS THE FIELDS OF ARTS, BUSINESS, CULTURE, EDUCATION, AND POLICY, THE SOCIETY PROVIDES INSIGHT, GENERATES IDEAS, AND PROMOTES COLLABORATION TO ADDRESS PRESENT CHALLENGES AND CREATE A SHARED FUTURE	75
THE BRUCE MUSEUM 1 MUSEUM DRIVE GREENWICH,CT 06830	NONE	PUBLIC	TO SUPPORT THE EXHIBITIONS AND EDUCATIONAL PROGRAMS THAT PROMOTE THE UNDERSTANDING AND APPRECIATION OF ART AND SCIENCE	45
VETERINARY CANCER CENTER 129 GLOVER AVE NORWALK,CT 06850	NONE	PUBLIC	TO GIVE HOPE TO PET OWNERS BY PURSUING BETTER WAYS TO DIAGNOSE, TREAT, AND PREVENT CANCER IN ALL ANIMALS	100
ABC CASSIDY'S PLACE 419 E 86TH ST NEW YORK,NY 10028	NONE	PUBLIC	NON PROFIT PRESCHOOL AND EARLY EDUCATION	100
Total ▶ 3a				166,062

TY 2015 Accounting Fees Schedule

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

EIN: 13-6997530

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PROFESSIONAL FEES	3,700	3,700		0

TY 2015 Investments - Other Schedule

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

EIN: 13-6997530

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
200 MURPHY OIL	AT COST	1,452	4,490
100 AMGEN	AT COST	2,012	16,233
35 IBM	AT COST	0	0
1500 SAPIENT CORP	AT COST	0	0
125 JOHNSON & JOHNSON	AT COST	5,921	8,731
50 REGENERON PHARMACEUTICALS	AT COST	3,101	10,857
200 DISCOVERY COMMUNICATIONS INC SER A	AT COST	0	0
125 EOG RES INC	AT COST	5,732	7,079
125 GILEAD SCIENCES INC	AT COST	4,583	4,554
500 ENTERPRISE PRODUCTS PARTNERS LP	AT COST	7,012	5,116
150 DISCOVERY COMMUNICATIONS INC SER C	AT COST	0	3,783

TY 2015 Other Assets Schedule

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

EIN: 13-6997530

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

TY 2015 Other Expenses Schedule

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

EIN: 13-6997530

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT FEES	1,004	1,004		0
FEDERAL TAX	2,000	0		0

Schedule B

(Form 990, 990-EZ, or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

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

▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990

OMB No 1545-0047

2015

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

Organization type (check one)

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

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

General Rule

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

Special Rules

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

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

Name of organization ROBERT & DALE ROSEN CHARITABLE FOUNDATION TR U/A 8/05/92	Employer identification number 13-6997530
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Part I Contributors (see instructions) Use duplicate copies of Part I if additional space is needed			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1		\$ 69,804	Person ☐
	ROBERT L ROSEN AND DALE ATKINS ROSE 67 PECKSLAND RD		Payroll ☐
	GREENWICH, CT 06831		Noncash ☒ (Complete Part II for noncash contributions)
2	RLR CAPITAL PARTNERS LP	\$ 3,700	Person ☒
	245 PARK AVENUE		Payroll ☐
	NEW YORK, NY 10167		Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)

Name of organization ROBERT & DALE ROSEN CHARITABLE FOUNDATION TR U/A 8/05/92	Employer identification number 13-6997530
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Part II	Noncash Property (see instructions) Use duplicate copies of Part II if additional space is needed
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(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	125 SHARES OF REGENERON PHARMACEUTICALS INC	\$ 69,804	2015-07-21
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	

Name of organization ROBERT & DALE ROSEN CHARITABLE FOUNDATION TR U/A 8/05/92	Employer identification number 13-6997530
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Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ► \$ _____

Use duplicate copies of Part III if additional space is needed

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