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Form **990-PF** Department of the Treasury

EXTENDED TO AUGUST 15, 20: Return of Private Foundation

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

Do not enter social security numbers on this form as it may be made public. Information about Form 990-PF and its separate instructions is at www.lrs.gov/form990pf. OMB No 1545-0052

| | | dar year 2015 or tax year beginning | - | , and ending | | |
|---|--------------|--|------------------------------------|---|--|---|
| | | foundation | | <u>-</u> | A Employer identification | number |
| | | L & GITTA KURLAT CHARIT | ABLE | | | |
| | | NDATION C/O SAUL KURLAT | | | 22-2610883 | } |
| | | nd street (or P O box number if mail is not delivered to street | | Room/suite | B Telephone number | |
| 6 | 4 1 | HIGHLAND STREET | | | 617-868-72 | 109 |
| | | own, state or province, country, and ZIP or foreign p | ostal code | | C If exemption application is p | ending, check here |
| | | BRIDGE, MA 02138 | | | : | |
| | | all that apply: Initial return | Initial return of a fo | ormer public charity | D 1. Foreign organization: | s, check here |
| | | Final return | Amended return | | 2 - | |
| | | Address change | Name change | | Foreign organizations me check here and attach co | omputation test, |
| H C | heck | type of organization: X Section 501(c)(3) ex | | | E If private foundation sta | tus was terminated |
| | | | Other taxable private founda | ition | under section 507(b)(1 |)(A), check here |
| I Fa | ır ma | rket value of all assets at end of year J Accounti | - | Accrual | F If the foundation is in a | |
| | | | ther (specify) | | under section 507(b)(1 |)(B), check here |
| | | 359,690. (Part I, colu | mn (d) must be on cash b | pasis) | | (4) |
| Pa | <u>ırt l</u> | Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a)) | (a) Revenue and expenses per books | (b) Net investment income | (c) Adjusted net income | (0) Disbursements for charitable purposes (cash basis only) |
| | 1 | Contributions, gifts, grants, etc., received | | | N/A | |
| | 2 | Check If the foundation is not required to attach Sch. B | | | | |
| | 3 | Interest on savings and temporary cash investments | 518. | 518. | | STATEMENT 1 |
| 7 | 4 | Dividends and interest from securities | 8,750. | 8,750. | | STATEMENT 2 |
| Ĵ | 5a | Gross rents | | | | |
| • | b | Net rental income or (loss) | | | | |
| Φ. | 6a | Net gain or (loss) from sale of assets not on line 10 | | | | |
| . L | b | Gross sales price for all assets on line 8a | | | | |
| Revenue | 7 | Capital gain net income (from Part IV, line 2) | | 0. | | ' |
| 1 | 8 | Net short-term capital gain | | | | |
| ・・・・・・・・・・・・・・・・・・・・・・・・・・・・・・・・・・・・・・・ | 9 10a | Income modifications Gross sales less returns and allowances | | | | |
| | b | Less Cost of goods sold | | | | |
| <u> </u> | C | Gross profit or (loss) | | | | |
| " | 11 | Other income | | | | |
| | 12 | Total Add lines 1 through 11 | 9,268. | 9,268. | | |
| | 13 | Compensation of officers, directors, trustees, etc | 0. | 0. | | 0. |
| | 14 | Other employee salaries and wages | | ···· | 111 | |
| Ş | ı | Pension plans, employee benefits | | | Fo. 16. | |
| Su. | ı | Legal fees Accounting fees STMT 3 | 4,790. | 958. | JUN 23 2 | (16 / 3,832. |
| ž | l . | Other professional fees | 4,750. | 230. | 121 JUN 23 6 | است |
| e E | 17 | Interest | | | [3] | 1 . • l |
| Operating and Administrative Expenses | t . | Taxes STMT 4 | 125. | 0. | | 0. |
| ist | 19 | Depreciation and depletion | | | | |
| Ë | 20 | Occupancy | | | | |
| Ad | 21 | Travel, conferences, and meetings | | | | |
| and | 22 | Printing and publications | | - · · · · · · · · · · · · · · · · · · · | | |
| ng : | 23 | Other expenses STMT 5 | 150. | 0. | | 0. |
| rati | 24 | Total operating and administrative | | 2=2 | | 2 222 |
| <u>Б</u> | 1 | expenses Add lines 13 through 23 | 5,065. | 958. | | 3,832. |
| | | Contributions, gifts, grants paid | 42,991. | <u> </u> | | 42,991. |
| | 26 | Total expenses and disbursements. | 48,056. | 958. | | 46,823. |
| | 07 | Add lines 24 and 25 Subtract line 26 from line 12: | 40,030. | 730. | | 40,043. |
| | 27 | Excess of revenue over expenses and disbursements | 38,788. | | | , |
| | 1 | Net investment income (if negative, enter -0-) | 337733. | 8,310. | | |
| | l | Adjusted net income (if negative, enter -0-) | | -, | N/A | |

| Part III | Analysis of Changes in Net Assets or Fund Balances |
|----------|--|

28 Paid-in or capital surplus, or land, bldg., and equipment fund

Total net assets or fund balances

31 Total liabilities and net assets/fund balances

Retained earnings, accumulated income, endowment, or other funds

| 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 | 367,417. |
| 2 | Enter amount from Part I, line 27a | 2 | -38,788. |
| | Other increases not included in line 2 (itemize) | 3 | 0. |
| 4 | Add lines 1, 2, and 3 | 4 | 328,629. |
| 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 | 328,629. |

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-636,628.

367,417.

367,417.

-675,416.

328,629

328,629

FOUNDATION C/O SAUL KURLAT

Capital Gains and Losses for Tax on Investment Income (b) How acquired P - Purchase D - Donation (c) Date acquired (a) List and describe the kind(s) of property sold (e.g., real estate, (d) Date sold (mo., day, yr.) (mo., day, yr.) 2-story brick warehouse; or common stock, 200 shs. MLC Co.) 1a NONE b C d (f) Depreciation allowed (a) Cost or other basis (h) Gain or (loss) (e) Gross sales price (or allowable) (e) plus (f) minus (g) plus expense of sale a b C d Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 (I) Gains (Col. (h) gain minus còl. (k), but not less than -0-) or (i) Adjusted basis (k) Excess of col. (i) Losses (from col. (h)) (i) F.M.V. as of 12/31/69 as of 12/31/69 over col. (j), if any b C d e If gain, also enter in Part I, line 7 2 Capital gain net income or (net capital loss) If (loss), enter -0- in Part I, line 7 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). If (loss), enter -0- in Part I, line 8 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. Yes X No 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. Enter the appropriate amount in each column for each year; see the instructions before making any entries. (d)
Distribution ratio
(col. (b) divided by col. (c)) (a) Base period years (c) Adjusted qualifying distributions Net value of noncharitable-use assets Calendar year (or tax year beginning in) 45,715 442,143. .103394 2014 465,569. 21,700. .046610 2013 24,878. 487,640. 2012 .051017 53,754 509,982 .105404 2011 34,371 527,003. 2010 .065220 .371645 2 Total of line 1, column (d) 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 .074329 394,041. Enter the net value of noncharitable-use assets for 2015 from Part X, line 5 29,289. Multiply line 4 by line 3 5 Enter 1% of net investment income (1% of Part I, line 27b) 6 83. 29,372. Add lines 5 and 6 7 46,823. 8 Enter qualifying distributions from Part XII, line 4 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.

SAUL & GITTA KURLAT CHARITABLE 22-2610883 Form 990-PF (2015) FOUNDATION C/O SAUL KURLAT Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions) 1a Exempt operating foundations described in section 4940(d)(2), check here
and enter "N/A" on line 1. _____ (attach copy of letter if necessary-see instructions) Date of ruling or determination letter: b Domestic foundations that meet the section 4940(e) requirements in Part V, check here 🕨 🗶 and enter 1% 83. 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-) 3 4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 5 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-6 Credits/Payments: a 2015 estimated tax payments and 2014 overpayment credited to 2015 6a 6b b Exempt foreign organizations - tax withheld at source 200 c Tax paid with application for extension of time to file (Form 8868) 6c d Backup withholding erroneously withheld 6d 200. 7 Total credits and payments. Add lines 6a through 6d 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 10 117. Refunded 0. Enter the amount of line 10 to be: Credited to 2016 estimated tax Part VII-A Statements Regarding Activities Yes No 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in X any political campaign? 1a X 1b b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? 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. X c Did the foundation file Form 1120-POL for this year? 1c 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. ▶ \$ e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation 0. managers. > \$ X 2 2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities. 3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes X 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? 4a N/A b If "Yes," has it filed a tax return on Form 990-T for this year? 4b X 5 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T6 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 6 X remain in the governing instrument? 7 Х 7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV 8a Enter the states to which the foundation reports or with which it is registered (see instructions) MA

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X

8b

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)

year 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)? If "Yes," complete Part XIV

10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses

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

of each state as required by General Instruction G? If "No," attach explanation

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| Pε | t VII-A Statements Regarding Activities (continued) | | | |
|----|---|---------------|-----------|----------|
| | | | Yes | No |
| 11 | At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of | | | |
| | ection 512(b)(13)? If "Yes," attach schedule (see instructions) | 11 | | <u>X</u> |
| 12 | Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? | 1 | | , |
| | f "Yes," attach statement (see instructions) | 12 | | X |
| 13 | Did the foundation comply with the public inspection requirements for its annual returns and exemption application? | 13 | X | |
| | Vebsite address ► N/A | | | |
| 14 | the books are in care of ► SAUL KURLAT Telephone no. ► 617-8 | | | |
| | ocated at ► 64 HIGHLAND STREET, CAMBRIDGE, MA ZIP+4 ►0 | <u> 2138</u> | | |
| 15 | Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here | • | . , . ▶ | |
| | ind enter the amount of tax-exempt interest received or accrued during the year | N | /A Yes | No |
| 16 | At any time during calendar year 2015, did the foundation have an interest in or a signature or other authority over a bank, | | res | |
| | ecurities, or other financial account in a foreign country? | 16 | <u> </u> | X |
| | See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the | 1 | | |
| Da | oreign country ► t VII-B Statements Regarding Activities for Which Form 4720 May Be Required | | | |
| Pe | | T | Yes | No |
| 4. | File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. | | . 03 | 110 |
| ıa | Ouring the year did the foundation (either directly or indirectly): 1) Engage in the sale or exchange, or leasing of property with a disqualified person? Yes X No | | | |
| | 2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) | | | |
| | a disqualified person? | | | |
| | 3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? | | | |
| | 4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? Yes X 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)? | | | |
| | 6) Agree to pay money or property to a government official? (Exception. Check "No" | 1 | ŀ | |
| | 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.) | | ŀ | |
| b | fany answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations | | | |
| | section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? | 1b | ļ | |
| | Organizations relying on a current notice regarding disaster assistance check here | | | |
| C | Old the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected | | | |
| _ | pefore the first day of the tax year beginning in 2015? | 1c | - | X |
| 2 | Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation | | | |
| _ | defined in section 4942(j)(3) or 4942(j)(5)): 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 | | | |
| a | pefore 2015? Yes X No | | | |
| | | | | |
| | f "Yes," list the years \(\sum | | | |
| · | 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.) N/A | 2b | | |
| c | f the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. | | | |
| | | ļ | | |
| 38 | Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time | | | |
| | during the year? | | ļ | |
| b | f "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) N/A | 3b | ļ | |
| | Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? | 4a | ļ | X |
| t | Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that | | | ,, |
| | nad not been removed from jeopardy before the first day of the tax year beginning in 2015? | 4b | | (004F) |
| | F | orm 99 | U-PF | (2015) |

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| 2 | Compensation of five highest-paid employees (other than those in | ncluded on line 1). If none | , enter "NONE." | | |
|----|--|---|------------------|---|--------------------------------------|
| | (a) Name and address of each employee paid more than \$50,000 | (b) Title, and average hours per week devoted to position | (c) Compensation | (d) Contributions to employee benefit plans and deferred compensation | (e) Expense account, othe allowances |
| _ | NONE | | | | |
| _ | | - | | | |
| | | | | | |
| | | _ | | [| |
| _ | | | | | |
| _ | | | | | |
| _ | | | | | |
| т. | otal number of other employees paid over \$50,000 | | | | |

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Total. Add lines 1 through 3

All other program-related investments. See instructions.

FOUNDATION C/O SAUL KURLAT

| Р | Minimum Investment Return (All domestic foundations must complete this part. Foreign four | ndations, | see instructions) |
|----|---|---------------|----------------------|
| 1 | Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: | | |
| а | Average monthly fair market value of securities | 1a | 137,751. |
| b | Average of monthly cash balances | 1b | 137,751. 262,291. |
| C | Fair market value of all other assets | 1c | |
| ď | Total (add lines 1a, b, and c) | 1d | 400,042. |
| | Reduction claimed for blockage or other factors reported on lines 1a and | | |
| | 1c (attach detailed explanation) | | |
| 2 | Acquisition indebtedness applicable to line 1 assets | 2 | 0. |
| 3 | Subtract line 2 from line 1d | 3 | 400,042. |
| 4 | Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) | 4 | 6,001. |
| 5 | Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 | 5 | 394,041. |
| 6 | Minimum investment return. Enter 5% of line 5 | 6 | 19,702. |
| P | art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations an | d certain | |
| | foreign organizations check here 🕨 🔃 and do not complete this part.) | | |
| 1 | Minimum investment return from Part X, line 6 | 1 | 19,702. |
| 2a | Tax on investment income for 2015 from Part VI, line 5 | j | |
| b | Income tax for 2015. (This does not include the tax from Part VI.) | | |
| C | Add lines 2a and 2b | 2c | 83. |
| 3 | Distributable amount before adjustments. Subtract line 2c from line 1 | 3 | 19,619. |
| 4 | Recoveries of amounts treated as qualifying distributions | 4 | 0. |
| 5 | Add lines 3 and 4 | 5 | 19,619. |
| 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 | 19,619. |
| P | Qualifying Distributions (see instructions) | | |
| 1 | Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes: | | 46 000 |
| | Expenses, contributions, gifts, etc total from Part I, column (d), line 26 | 1a | 46,823. |
| | 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: | | 1 |
| | Suitability test (prior IRS approval required) | 3a | |
| þ | Cash distribution test (attach the required schedule) | 3b | 46.002 |
| 4 | Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4 | _4 | 46,823. |
| 5 | Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment | | 0.0 |
| | income. Enter 1% of Part I, line 27b | 5 | 83. |
| 6 | Adjusted qualifying distributions Subtract line 5 from line 4 | 6 | 46,740. |
| | Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation of | jualifies 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 | | | | 19,619. |
| 2 Undistributed income, if any, as of the end of 2015 | | | | |
| a Enter amount for 2014 only | | | 0. | |
| b Total for prior years: | | | | ···· |
| | | 0. | | |
| 3 Excess distributions carryover, if any, to 2015: | | | | |
| a From 2010 8,267. | | | | |
| b From 2011 28,475. | | } | | |
| c From 2012 673. | | | | |
| d From 2013 | | | | |
| e From 2014 23,784. | | | | |
| f Total of lines 3a through e | 61,199. | | | |
| 4 Qualifying distributions for 2015 from | | | | |
| Part XII, line 4: ▶\$ 46,823. | | | | |
| 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 | | | | 19,619. |
| e Remaining amount distributed out of corpus | 27,204. | | | |
| 5 Excess distributions carryover applied to 2015 | 0. | | | 0. |
| (If an amount appears in column (d), the same amount must be shown in column (a)) | | | | |
| 6 Enter the net total of each column as indicated below: | | | | |
| a Corpus Add lines 3f, 4c, and 4e Subtract line 5 | 88,403. | | | |
| 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 instr. | | | 0. | |
| f Undistributed income for 2015. Subtract | | | | |
| lines 4d and 5 from line 1. This amount must | | | | |
| be distributed in 2016 | | | | 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 | | | - | <u> </u> |
| not applied on line 5 or line 7 | 8,267. | | | |
| 9 Excess distributions carryover to 2016. | | | | |
| Subtract lines 7 and 8 from line 6a | 80,136. | | | · · · · · · · · · · · · · · · · · · · |
| 10 Analysis of line 9: | | | | |
| a Excess from 2011 28,475. | | | | |
| b Excess from 2012 673. | | | | |
| c Excess from 2013 | ļ | ļ | | |
| d Excess from 2014 23,784. | | | | |
| e Excess from 2015 27, 204. | | | | |
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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).)

SAUL KURLAT

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

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

Check here \(\sum \textbf{X} \) 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:

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)

FOUNDATION C/O SAUL KURLAT

Supplementary Information (continued) Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, Recipient Purpose of grant or contribution Foundation show any relationship to Amount status of any foundation manager Name and address (home or business) recipient or substantial contributor a Paid during the year SEE STATEMENT 6SEE STATEMENT 6 AMERICAN TECHNION SOCIETY 55 EAST 59TH STREET 100. NEW YORK, NY 10022 SEE STATEMENT 6SEE STATEMENT 6 ASPCA 424 EAST 92ND STREET 30, NEW YORK, NY 10128 BETA GAMMA SIGMA SEE STATEMENT 6SEE STATEMENT 6 125 WELDON PARKWAY MARYLAND HEIGHTS, MO 63043 2,500, SEE STATEMENT 6SEE STATEMENT 6 CAPE COD HEALTHCARE FOUNDATION PO BOX 370 HYANNIS, MA 02601 200. SEE STATEMENT 6SEE STATEMENT 6 FALMOUTH JEWISH CONGREGATION, INC 7 HATCHVILLE ROAD EAST FALMOUTH MA 02536 2 600. SEE CONTINUATION SHEET(S) ➤ 3a Total_ 42,991. **b** Approved for future payment NONE _Total

523611

Part XVI-A Analysis of Income-Producing Activities

| Enter gross amounts unless otherwise indicated. | Unrelate | d business income | | led by section 512, 513, or 514 | (e) |
|---|------------------|--|-----------------------|---------------------------------|---|
| Effet gross amounts unless otherwise maleated. | (a) Business | (b) | (C) Exclu- sion | (d) | Related or exempt |
| 1 Program service revenue: | code | Amount | code | Amount | function income |
| a | | | | | |
| b | | | | | |
| c | | | | | |
| d | | | | | |
| e | | | | | |
| | | | | | |
| g Fees and contracts from government agencies | <u> </u> | | | | |
| 2 Membership dues and assessments | | | | | , , |
| 3 Interest on savings and temporary cash | | | اما | F10 | |
| investments | | | 14 | 518. 8,750. | |
| 4 Dividends and interest from securities | | | 14 | 8,750. | |
| 5 Net rental income or (loss) from real estate: | - | | ├ | | |
| a Debt-financed property | ļ | | | | |
| b Not debt-financed property | | | \vdash | | |
| 6 Net rental income or (loss) from personal | | | | | |
| property | | · | | | |
| 7 Other investment income | | | | | |
| 8 Gain or (loss) from sales of assets other | | | | | |
| than inventory | | | <u> </u> | | |
| 9 Net income or (loss) from special events | | | | | |
| 10 Gross profit or (loss) from sales of inventory | | | | | |
| 11 Other revenue: | | | | | |
| a | 1 | | | | |
| b | | | | | |
| c | | | | | *************************************** |
| • | | | 1 | | |
| e | | | 1 | | |
| 12 Subtotal. Add columns (b), (d), and (e) | | 0. | | 9,268. | 0. |
| 13 Total Add line 12, columns (b), (d), and (e) | L | | | | 9,268. |
| (See worksheet in line 13 instructions to verify calculations.) | | | | | |
| Part XVI-B Relationship of Activities t | o the Acco | mplishment of Ex | vemnt | Purnosas | |
| | | | | | |
| Line No. Explain below how each activity for which income | | | contrib | uted importantly to the accom | plishment of |
| the foundation's exempt purposes (other than | by providing fui | nds for such purposes). | | | |
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| 523621 11-24-15 | | | | | Form 990-PF (2015) |

| Part XVII | Information Reg | | sfers To a | and Transactions | and Relations | hips With No | ncharitable | | <u> </u> |
|---------------------|--|---|--------------------|---------------------------------------|--|---------------------------|---|----------------------|------------------|
| 1 Did the or | ganization directly or indire | | of the followin | g with any other organization | on described in sect | ion 501(c) of | | Yes | No |
| | (other than section 501(c)(| | | | | | | | |
| | from the reporting foundat | | | | | | | | |
| (1) Cash | | | | | | | 1a(1) | | Х |
| (2) Other | assets | | | | | | 1a(2) | | X |
| b Other tran | sactions: | | | | | | | | |
| (1) Sales | of assets to a noncharitable | le exempt organızat | ion | | | | 1b(1) | | X |
| (2) Purch | nases of assets from a none | charitable exempt o | rganization | | | | 1b(2) | | X |
| (3) Renta | il of facilities, equipment, o | r other assets | | | | | 1b(3) | | <u>X</u> |
| (4) Reiml | bursement arrangements | | | | | | 1b(4) | | X |
| ` ' | s or Ioan guarantees | | | | | | 1b(5) | | X X X X |
| | rmance of services or men | | | | | | 1b(6) | | X |
| | f facilities, equipment, maili | | | | | | | L | <u> </u> |
| or service: | wer to any of the above is " s given by the reporting foi I) the value of the goods, o | undation. If the four | dation receive | | | | | sets, | |
| | (b) Amount involved | | | e exempt organization | (d) Description | of transfers, transaction | ns, and sharing ar | rangeme | nts |
| | | | N/A | | | | | | |
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| in section | ndation directly or indirectly 501(c) of the Code (other complete the following scheme | than section 501(c) dule. | | tion 527? | izations described | (4) December of the | Yes | X |] No |
| | (a) Name of orga | nization | | (b) Type of organization | | (c) Description of re | nationship | - | |
| | N/A_ | · · · · · · · · · · · · · · · · · · · | | | | | . | | |
| <u>.</u> | | | | | | | | | |
| | | | _ | | - | ···· | - | | |
| | | | | | | | | | |
| Sign Here | penalties of perjury, I declare the left, it is true, correct, and compared to the left of | nat I have examined this plete Declaration of pre | s return, includin | n taxpayer) is based on all inforr | t statements, and to the nation of which prepare TRUST Title | r has any knowledge | May the IRS return with the shown below X Yes | e prepar (see ins | er |
| | Print/Type preparer's nar | ne | Preparer's si | Date | Date | Check If | PTIN | | |
| | ** * * | | ι Ιομαίδι ο δί | ignatur v | Jaco | self- employed | | | |
| Paid | STEPHEN A. | · · | CULDAE | N A. KURZMA | 06/02/16 | | P00062 | 276 | |
| Preparer | | | | KOWALKER, I | | Firm's EIN ▶ 0 | | | |
| Use Only | THIN S HAIRE P RORE | man, Dim | LULI Œ | . ICHADICUL, I | | | | <i>,</i> = | |
| | Firm's address ▶ 101 | 7 TURNET | KE STR | EET, SUITE 2 | 25 | | | | |
| | | NTON, MA | | | | Phone no. 78 | 1-828-9 | 420 | |
| | | | | | | | Form 99 | | |

Part XV Supplementary Information Grants and Contributions Paid During the Year (Continuation) If recipient is an individual, Recipient show any relationship to any foundation manager Foundation Purpose of grant or Amount status of contribution Name and address (home or business) or substantial contributor recipient SEE STATEMENT 6SEE STATEMENT 6 FRIENDS OF THE ISRAEL DEFENSE FORCES 154 WELLS AVENUE 100. NEWTON, MA 02459 SEE STATEMENT 6SEE STATEMENT 6 GEORGIA TECH ALUMNI ASSOCIATION 190 NORTH AVE NORTHWEST 100. ATLANTA GA 30313 SEE STATEMENT 6SEE STATEMENT 6 MASSACHUSETTS GENERAL HOSPITAL 100 CAMBRIDGE STREET 2.100. BOSTON, MA 02114 MSPCA ANGELL SEE STATEMENT 6SEE STATEMENT 6 350 SOUTH HUNTINGTON AVENUE 50, BOSTON, MA 02130 SEE STATEMENT 6SEE STATEMENT 6 MUSEUM OF FINE ARTS 465 HUNTINGTON AVENUE 3,000. BOSTON, MA 02115 SEE STATEMENT 6SEE STATEMENT 6 NEW ENGLAND BAPTIST HOSPITAL 125 PARKER HILL AVENUE 1,500. BOSTON, MA 02120 PERKINS SCHOOL FOR THE BLIND SEE STATEMENT 6SEE STATEMENT 6 175 NORTH BEACON STREET 100. WATERTOWN, MA 02472 TEMPLE ISRAEL SEE STATEMENT 6SEE STATEMENT 6 477 LONGWOOD AVENUE 1,256, BOSTON, MA 02215 SEE STATEMENT 6SEE STATEMENT 6 COMBINED JEWISH PHILANTHROPY 128 HIGH STREET 25,000. BOSTON, MA 02110 SEE STATEMENT 6SEE STATEMENT 6 CHILDREN'S TRUST 55 COURT STREET, 4TH FLOOR 1,000. BOSTON MA 02108 37.561. Total from continuation sheets

Part XV Supplementary Information Grants and Contributions Paid During the Year (Continuation) If recipient is an individual, Recipient show any relationship to Foundation Purpose of grant or Amount any foundation manager or substantial contributor status of contribution Name and address (home or business) recipient SEE STATEMENT 6SEE STATEMENT 6 INTER. ASSOC FOR MED. ASSIST TO TRAVELERS 1623 MILITARY ROAD, #279 30. NIAGRA FALLS, NY 14304 SEE STATEMENT 6SEE STATEMENT 6 JEWISH FEDERATION OF CC PO BOX 2568 100, HYANNIS MA 02601 SEE STATEMENT 6SEE STATEMENT 6 JEWISH GEN 36 BATTERY PLACE 100. NEW YORK, NY 10280 LEUKEMIA LYMPHOMA SOCIETY SEE STATEMENT 6SEE STATEMENT 6 9 ERIE DRIVE NATICK MA 01760 1,000, SEE STATEMENT 6SEE STATEMENT 6 MA DOWN SYNDROME CONGRESS 20 BURLINGTON MALL ROAD, SUITE 261 1 000. BURLINGTON, MA 01803 SEE STATEMENT 6SEE STATEMENT 6 MATIGNON HIGH SCHOOL ONE MATIGNON ROAD 1,000. CAMBRIDGE, MA 02140 SEE STATEMENT 6SEE STATEMENT 6 NATIONAL GEOGRAPHIC 1145 17TH STREET N.W. 50. WASHINGTON, DC 20036 SEE STATEMENT 6SEE STATEMENT 6 US HOLOCAUST MUSEUM 100 RAOUL WALLENBERG PLACE SW 25. WASHINGTON, DC 20024 SEE STATEMENT 6SEE STATEMENT 6 CONSUMER REPORTS FOUNDATION 101 TRUMAN AVENUE 50. YONKERS NY 10703 Total from continuation sheets

| FORM 990-PF INTERES | ST ON SAVIN | GS AND TEM | PORARY | CASH IN | VESTMENTS | STATEMENT 1 |
|--|-----------------|-------------------------------------|---------|--------------------------|-------------------------------|-------------|
| SOURCE | REVE | (A) REVENUE NET I PER BOOKS I | | | (C) ADJUSTED NET INCOME | |
| CENTURY BANK | | | 518. | | 518. | |
| TOTAL TO PART I, LI | NE 3 | | 518. | | 518. | |
| FORM 990-PF | DIVIDENDS | AND INTER | EST FRO | M SECUR | ITIES | STATEMENT 2 |
| SOURCE | GROSS AMOUNT | CAPITAL GAINS DIVIDEND | RE | (A) EVENUE R BOOKS | (B) NET INVES MENT INCO | |
| US BONDS | 8,750. | | 0. | 8,750. | 8,75 | 0. |
| TO PART I, LINE 4 | 8,750. | | 0. | 8,750. | 8,75 | 0. |
| FORM 990-PF | | ACCOUNTI | NG FEES | 5 | | STATEMENT 3 |
| DESCRIPTION | | (A) EXPENSES PER BOOKS | | | (C) ADJUSTED NET INCOM | |
| KURZMAN, DEMPSEY & KO | OWALKER, | 4,790. | | 958. | | 3,832. |
| TO FORM 990-PF, PG | 1, LN 16B | 4,790. | ===== | 958. | | 3,832. |
| FORM 990-PF | | TAX | ES | | | STATEMENT 4 |
| DESCRIPTION | | (A) EXPENSES PER BOOKS | | 3) IVEST- INCOME | (C) ADJUSTED NET INCOM | |
| COMMONWEALTH OF MA ANNUAL PUBLIC CHARI' | | 35. | | 0. | | 0. |
| FEDERAL EXCISE TAX | _ | 90. | | 0. | | |
| TO FORM 990-PF, PG | 1, LN 18 | 125. | | 0. | | 0. |

| (B) NET INVES S MENT INCO | · · | (C) JUSTED | (D) |
|---------------------------------|--------|---------------|------------------------|
| S MENT INCO | ME NET | INCOME | CHARITABLE PURPOSES |
| 0. | 0. | | 0. |
| 0. | 0. | | 0. |
| | 0. | | |

FOUNDATION STATUS OF RECIPIENT:

PUBLIC CHARITY - AN ORGANIZATION DESCRIBED IN SECTION 509(A)(1), (2) OR (3)

PURPOSE OF GRANT OR CONTRIBUTION:

FOR THE UNRESTRICTED USE BY RECEIPENTS IN THEIR TAX EXEMPT PURPOSE.

FORM 4720 HAS BEEN FILED SEPARATELY BY SAUL KURLAT

| FORM 990-PF U.S. AND STATE/ | CITY GOV | ERNMENT | OBLIGATIONS | STATEMENT 7 |
|------------------------------------|---------------|----------------|-------------|----------------------|
| DESCRIPTION | U.S. GOV'T | OTHER GOV'T | BOOK VALUE | FAIR MARKET VALUE |
| US GOVERNMENT OBLIGATIONS | × | | 99,792. | 130,953. |
| TOTAL U.S. GOVERNMENT OBLIGATIONS | | - | 99,792. | 130,953. |
| TOTAL STATE AND MUNICIPAL GOVERNME | NT OBLIG | RATIONS | | |
| TOTAL TO FORM 990-PF, PART II, LIN | E 10A | - | 99,792. | 130,953. |