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

Name of foundation STEPHEN & MARY DOWICZ FOUNDATION INC C/O MH DAVIDSON & CO		A Employer identification number 22-3734687	
Number and street (or P O box number if mail is not delivered to street address) 520 MADISON AVE 30TH FL		Room/suite	
City or town, state or province, country, and ZIP or foreign postal code NEW YORK, NY 10022		B Telephone number (see instructions) (212) 446-4040	
G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		C If exemption application is pending, check here ☐ D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐ E If private foundation status was terminated under section 507(b)(1)(A), check here ☐ F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation			
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 2,826,672		J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis)	

Part I Analysis of Revenue and Expenses <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</i>		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)	69,080			
	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	5,489	5,489		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	132,525			
	b Gross sales price for all assets on line 6a 247,774				
	7 Capital gain net income (from Part IV, line 2) . . .		126,767		
	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)	 52,127	52,127		
	12 Total. Add lines 1 through 11	259,221	184,383		
	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).	 4,900	2,450		2,450
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	 2,000	0		0
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings.				
	22 Printing and publications				
	23 Other expenses (attach schedule).	 89	89		0
	24 Total operating and administrative expenses. Add lines 13 through 23	6,989	2,539		2,450
	25 Contributions, gifts, grants paid	114,450			114,450
	26 Total expenses and disbursements. Add lines 24 and 25	121,439	2,539		116,900
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	137,782			
	b Net investment income (if negative, enter -0-)		181,844		
	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			577,095	315,582	315,582
	2	Savings and temporary cash investments					
	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)			154,667	120,194	151,323
	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)			2,011,261	2,402,626	2,359,767
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____					
	15	Other assets (describe ▶ _____)					
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)			2,743,023	2,838,402	2,826,672
Liabilities	17	Accounts payable and accrued expenses					
	18	Grants payable					
	19	Deferred revenue					
	20	Loans from officers, directors, trustees, and other disqualified persons					
	21	Mortgages and other notes payable (attach schedule).					
	22	Other liabilities (describe ▶ _____)					
	23	Total liabilities (add lines 17 through 22)			0	0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐		and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted					
	25	Temporarily restricted					
	26	Permanently restricted					
	Foundations that do not follow SFAS 117, check here ▶ ☒		and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds			899,757	899,757	
	28	Paid-in or capital surplus, or land, bldg, and equipment fund			0	0	
	29	Retained earnings, accumulated income, endowment, or other funds			1,843,266	1,938,645	
	30	Total net assets or fund balances (see instructions)			2,743,023	2,838,402	
	31	Total liabilities and net assets/fund balances (see instructions) . .			2,743,023	2,838,402	

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	2,743,023
2	Enter amount from Part I, line 27a	2	137,782
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	2,880,805
5	Decreases not included in line 2 (itemize) ▶ _____	5	42,403
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	2,838,402

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 D—Donation (b)	Date acquired (c) (mo , day, yr)	Date sold (d) (mo , day, yr)
1 a	LTCG(L) Through K-1's	P	2014-01-01	2015-12-31
b	STCG(L) Through K-1's	P	2015-01-01	2015-12-31
c	Section 1256 Gains	P	2014-01-01	2015-12-31
d	Pubicly Traded Stock	P	2014-01-01	2015-12-31
e	Gain/loss on 990T	P	2014-01-01	2015-12-31

(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 19,007			19,007
b 68,702			68,702
c 193			193
d 154,114		115,249	38,865
e 5,758		5,758	0

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(i) F M V as of 12/31/69	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h)) (l)
a			19,007
b			68,702
c			193
d			38,865
e			0

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	126,767
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	109,875	2,718,930	0 040411
2013	99,460	2,416,757	0 041154
2012	78,625	1,934,105	0 040652
2011	100,103	1,861,464	0 053776
2010	74,558	1,713,837	0 043504

2	Total of line 1, column (d).	2	0 219497
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 043899
4	Enter the net value of noncharitable-use assets for 2015 from Part X, line 5.	4	2,719,127
5	Multiply line 4 by line 3.	5	119,367
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	1,818
7	Add lines 5 and 6.	7	121,185
8	Enter qualifying distributions from Part XII, line 4.	8	116,900

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	3,637
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	3,637
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	3,637
6		Credits/Payments			
a		2015 estimated tax payments and 2014 overpayment credited to 2015		6a	
b		Exempt foreign organizations—tax withheld at source		6b	
c		Tax paid with application for extension of time to file (Form 8868).		6c	4,000
d		Backup withholding erroneously withheld		6d	
7		Total credits and payments. Add lines 6a through 6d.		7	4,000
8		Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached		8	86
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	277
11		Enter the amount of line 10 to be Credited to 2015 estimated tax ☐ 277 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?			Yes	No
b		Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for 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		1a		No
c		Did the foundation file Form 1120-POL for this year?		1b		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		1c		No
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? If "Yes," attach a detailed description of the activities		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? If "Yes," attach a conformed copy of the changes		3		No
4a		Did the foundation have unrelated business gross income of \$1,000 or more during the year?		4a	Yes	
b		If "Yes," has it filed a tax return on Form 990-T for this year?		4b	Yes	
5		Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		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? If "Yes," complete Part II, col (c), and Part XV		7	Yes	
8a		Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ NJ, NY				
b		If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .		8b	Yes	
9		Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)? If "Yes," complete Part XIV		9		No
10		Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		10		No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ <u>N/A</u>	13	Yes	
14	The books are in care of ▶ <u>STEPHEN DOWICZ</u> Telephone no ▶ <u>(212) 446-4040</u> Located at ▶ <u>520 madison ave 30th fl NEW YORK NY</u> ZIP+4 ▶ <u>10022</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ▶ ☐ and enter the amount of tax-exempt interest received or accrued during the year ▶ 15			
16	At any time during calendar year 2015, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country ▶	16	Yes	No

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
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)? 1b			
	Organizations relying on a current notice regarding disaster assistance check here. ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that 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 ▶ 2014 , 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			No
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
STEPHEN DOWICZ	TRUSTEE 1 00	0	0	0
520 madison ave 30th fl NEW YORK, NY 10022				
MARY DOWICZ	TRUSTEE 1 00	0	0	0
520 madison ave 30th fl NEW YORK, NY 10022				

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	102,262
b	Average of monthly cash balances.	1b	446,321
c	Fair market value of all other assets (see instructions).	1c	2,211,952
d	Total (add lines 1a, b, and c).	1d	2,760,535
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	2,760,535
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	41,408
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	2,719,127
6	Minimum investment return. Enter 5% of line 5.	6	135,956

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	135,956
2a	Tax on investment income for 2015 from Part VI, line 5.	2a	3,637
b	Income tax for 2015 (This does not include the tax from Part VI).	2b	317
c	Add lines 2a and 2b.	2c	3,954
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	132,002
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	132,002
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	132,002

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	116,900
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	116,900
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions).	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	116,900

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				132,002
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only.			128,932	
b Total for prior years 2013 , 20 , 20		1,492		
3 Excess distributions carryover, if any, to 2015				
a From 2010.				
b From 2011.				
c From 2012.				
d From 2013.				
e From 2014.				
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2015 from Part XII, line 4 ► \$ 116,900				
a Applied to 2014, but not more than line 2a			116,900	
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.				0
e Remaining amount distributed out of corpus	0			
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:	0			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
b Prior years' undistributed income Subtract line 4b from line 2b		1,492		
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		1,492		
e Undistributed income for 2014 Subtract line 4a from line 2a Taxable amount—see instructions			12,032	
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015				132,002
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).	0			
9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a	0			
10 Analysis of line 9				
a Excess from 2011.				
b Excess from 2012.				
c Excess from 2013.				
d Excess from 2014.				
e Excess from 2015.				

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	114,450
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)

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?

[illegible]

b If "Yes," complete the following schedule		
(a) Name of organization	(b) Type of organization	(c) Description of relationship

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

***** _____ Signature of officer or trustee	2016-11-10 _____ 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 STEVE KREINIK	Preparer's Signature	Date	Check if self-employed ☒	PTIN P00839914
	Firm's name ▶ COHNREZNICK LLP			Firm's EIN ▶	22-1478099
	Firm's address ▶ 1212 Avenue of the Americas New York, NY 10036			Phone no	(212) 297-0400

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).

STEPHEN DOWICZ

MARY DOWICZ

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>				
regis High School 55 e 84th st new york, NY 10028	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRING OUT THEIR EXEM	900
angel Fund 649 main St wakefield, MA 01880	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRING OUT THEIR EXEM	15,000
colon Cancer Challenge fdn 10 new king st white plains, NY 10604	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRING OUT THEIR EXEM	500
Covenant House 461 Eighth Avenue new york, NY 10001	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRYING OUT THEIR EXEM	16,000
several sources shelters po box 157 ramsey, NJ 07446	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRING OUT THEIR EXEM	1,000
pgagf 164 AMBOY ST brooklyn, NY 10001	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRING OUT THEIR EXEM	1,300
Debra of America 75 BROAD STREET new york, NY 10001	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRING OUT THEIR EXEM	3,000
Durga Tree Int'l 100 W Main St ramsey, NJ 07446	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRING OUT THEIR EXEM	1,000
pelham comm rowing association po box 8598 pelham, NY 10803	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRING OUT THEIR EXEM	500
wounded warrior project 4899 belfort rd jacksonville, FL 32256	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRING OUT THEIR EXEM	1,500
salvation army 615 slaters lane alexandria, VA 22313	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRING OUT THEIR EXEM	500
Transportation Alternatives 111 john st new york, NY 10038	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRING OUT THEIR EXEM	5,000
andy k & Friends 271 townline rd west nyack, NY 109942823	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRING OUT THEIR EXEM	1,000
HHK Vol Ambulance 52 SHERIDAN AVE hohokus, NJ 07423	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRING OUT THEIR EXEM	1,000
HHK Vol Fire Dept 53 SHERIDAN AVE hohokus, NJ 07423	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRING OUT THEIR EXEM	2,000
Total			. ► 3a	114,450

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>				
Hudson Guild 75 W 205TH ST bronx, NY 10016	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRING OUT THEIR EXEM	1,000
Julia's Butterfly 637 WYCKOFF AVE wyckoff, NJ 08607	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRING OUT THEIR EXEM	2,500
special olympics po box 157 ramsey, NY 10996	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRING OUT THEIR EXEM	2,500
Make a Wish NJ 4742 N 24th St phoenix, AZ 85016	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRING OUT THEIR EXEM	500
MS Hope for a Cure 2250 BROADWAY new york, NY 10001	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRING OUT THEIR EXEM	8,000
Museum of the City of NY 1220 FIFTH AVENUE new york, NY 10001	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRING OUT THEIR EXEM	5,000
NJ Buddies 75 w 205TH ST bronx, NY 10001	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRING OUT THEIR EXEM	250
pony Power Therapies 1170 RAMAPO VALLEY RD mahwah, NJ 07446	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRING OUT THEIR EXEM	1,000
bronx science endowment po box 449 jerome ave, NY 10468	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRING OUT THEIR EXEM	10,000
st josephs 5600 city avenue philadelphia, PA 19131	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRING OUT THEIR EXEM	1,000
Solving Kids Cancer 100 W Main St new york, NY 10001	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRING OUT THEIR EXEM	2,500
valley hospital 223 n van dien ridgewood, NJ 07450	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRING OUT THEIR EXEM	3,500
St Luke's Church 340 N FRANKLIN TPKE hohokus, NJ 07423	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRING OUT THEIR EXEM	5,000
food for the poor 6401 lyon ave coconut creek, FL 33073	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRING OUT THEIR EXEM	1,000
St Ignatius School 995 Reading Ave yardley, PA 19067	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRING OUT THEIR EXEM	2,500
Total ▶ 3a				114,450

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

Recipient Name and address (home or business)	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
a <i>Paid during the year</i>				
St Aloysius School 935 benneys mill rd jackson, NJ 08527	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRING OUT THEIR EXEM	1,000
sl fire dept 52 SHERIDAN AVE hohokus, NJ 07423	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRING OUT THEIR EXEM	500
hospital for special surgery 535 east 70th st new york, NY 10021	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRING OUT THEIR EXEM	1,000
habitat for humanity 121 habitat street americus, GA 31709	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRING OUT THEIR EXEM	2,000
calvary Hospital 1740 eastchester bronx, NY 10461	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRING OUT THEIR EXEM	2,000
alzheimer association 225 N Michigan ave chicago, IL 60601	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRYING OUT THEIR EXEM	2,000
University of the arts 320 s broad st philadelphia, PA 19102	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRYING OUT THEIR EXEM	5,000
Help USA 115 East 13th Street new york, NY 10003	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRYING OUT THEIR EXEM	2,500
go for the goal 215 Cuthbert Blvd cherry hill, NJ 08002	none	501(C)(3)	TO AID DONEE ORGANIZATIONS IN CARRYING OUT THEIR EXEM	2,000
Total ▶ 3a				114,450

TY 2015 Accounting Fees Schedule**Name:** STEPHEN & MARY DOWICZ FOUNDATION INC

C/O MH DAVIDSON & CO

EIN: 22-3734687

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
	4,900	2,450		2,450

TY 2015 Applied to Prior Year Election

Name: STEPHEN & MARY DOWICZ FOUNDATION INC
C/O MH DAVIDSON & CO

EIN: 22-3734687

Election: PART XIII, LINE 4b: THE FOUNDATION ELECTS TO APPLY EXCESS
QUALIFYING DISTRIBUTIONS TO UNDISTRIBUTED INCOME FROM
PRIOR YEARS.

TY 2015 Investments Corporate Stock Schedule

Name: STEPHEN & MARY DOWICZ FOUNDATION INC
C/O MH DAVIDSON & CO

EIN: 22-3734687

Name of Stock	End of Year Book Value	End of Year Fair Market Value
25,726 gabriel resources	82,472	3,602
2,262 COMDISCO INC. NOTE	11,080	10,179
1,838 AUXILIUM	0	0
1,205 shs Melco Crown Entertainment	0	0
218 shs china biologic	8,553	31,056
96,000 shs nexteer automotive	18,089	106,486

TY 2015 Investments - Other Schedule**Name:** STEPHEN & MARY DOWICZ FOUNDATION INC

C/O MH DAVIDSON & CO

EIN: 22-3734687

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
MH DAVIDSON & CO	AT COST	1,302,272	1,426,901
MHD MANAGEMENT CO	AT COST	362,786	312,940
dk group	AT COST	117,900	110,975
FORTRESS VALUE RECOVERY FD	AT COST	13,975	2,096
FORTRESS VALUE OFFSHORE FUND	AT COST	105,693	6,855
Freedom Bank Preferred Stock	AT COST	500,000	500,000

TY 2015 Other Decreases Schedule

Name: STEPHEN & MARY DOWICZ FOUNDATION INC

C/O MH DAVIDSON & CO

EIN: 22-3734687

Description	Amount
unrealized appreciation on appreciated securities contributed to foundation	42,403

TY 2015 Other Expenses Schedule

Name: STEPHEN & MARY DOWICZ FOUNDATION INC
C/O MH DAVIDSON & CO

EIN: 22-3734687

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
filing fee	55	55		0
Other Fees	34	34		0

TY 2015 Other Income Schedule

Name: STEPHEN & MARY DOWICZ FOUNDATION INC
C/O MH DAVIDSON & CO

EIN: 22-3734687

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
other income - through k-1s	52,127	52,127	52,127

TY 2015 Section 4942(a)(2) Explanation Statement

Name: STEPHEN & MARY DOWICZ FOUNDATION INC
C/O MH DAVIDSON & CO

EIN: 22-3734687

Explanation: 2014 UNDISTRIBUTED INCOME WAS DISTRIBUTED IN 2016.

TY 2015 Taxes Schedule

Name: STEPHEN & MARY DOWICZ FOUNDATION INC
C/O MH DAVIDSON & CO
EIN: 22-3734687

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
federal taxes	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
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Name of the organization STEPHEN & MARY DOWICZ FOUNDATION INC C/O MH DAVIDSON & CO	Employer identification number 22-3734687
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Organization type (check one)

Filers of: Form 990 or 990-EZ Form 990-PF	Section: ☐ 501(c)() (enter number) organization ☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation ☐ 527 political organization ☒ 501(c)(3) exempt private foundation ☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation ☐ 501(c)(3) taxable private foundation
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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 STEPHEN & MARY DOWICZ FOUNDATION INC C/O MH DAVIDSON & CO	Employer identification number 22-3734687
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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	stephen mary dowicz	\$ 25,820	Person ☐
	520 madison ave 30th fl		Payroll ☐
	new york, NY 10022		Noncash ☒ (Complete Part II for noncash contributions)
2	stephen mary dowicz	\$ 43,260	Person ☐
	520 madison ave 30th fl		Payroll ☐
	new york, NY 10022		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 STEPHEN & MARY DOWICZ FOUNDATION INC C/O MH DAVIDSON & CO	Employer identification number 22-3734687
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Part II

Noncash Property

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

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	218 SHS CHINA BIOLOGIC	\$ 25,820	2015-06-18
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
2	96,000 shs Nexteer Automotive group	\$ 43,260	2015-12-08
(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 STEPHEN & MARY DOWICZ FOUNDATION INC C/O MH DAVIDSON & CO	Employer identification number 22-3734687
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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	
	_____	_____	
	_____	_____	
	--	_____	
	_____	_____	