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Form

990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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Information about Form 990-PF and its instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2015

Open to Public Inspection

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

Name of foundation SCHWAB-SILFEN FOUNDATION		A Employer identification number 23-6401901	
Number and street (or P O box number if mail is not delivered to street address) PO BOX 5796		B Telephone number (see instructions) (717) 233-8083	
City or town, state or province, country, and ZIP or foreign postal code HARRISBURG, PA 17110		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change		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) \$ 6,320,977		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)	304,983			
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	6	6		
	4 Dividends and interest from securities	274,500	274,500		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	186,138			
	b Gross sales price for all assets on line 6a 446,284				
	7 Capital gain net income (from Part IV, line 2) . . .		186,138		
	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	765,627	460,644		
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule).				
	b Accounting fees (attach schedule).	5,900	1,770		4,130
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	7,789	2,272		
	19 Depreciation (attach schedule) and depletion . .				
	20 Occupancy				
	21 Travel, conferences, and meetings.				
	22 Printing and publications				
	23 Other expenses (attach schedule).	20,915	17,674		3,241
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	34,604	21,716		7,371
	25 Contributions, gifts, grants paid	479,135			479,135
	26 Total expenses and disbursements. Add lines 24 and 25	513,739	21,716		486,506
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	251,888			
	b Net investment income (if negative, enter -0-)		438,928		
	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		70,828	46,780	46,780
	2	Savings and temporary cash investments		94,533	26,252	26,252
	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)	4,484,115	4,829,528	6,247,945	
	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)	25,000			
	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)	4,674,476	4,902,560	6,320,977		
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		
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	4,674,476	4,902,560		
	28	Paid-in or capital surplus, or land, bldg , and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds				
30	Total net assets or fund balances(see instructions)	4,674,476	4,902,560			
31	Total liabilities and net assets/fund balances(see instructions)	4,674,476	4,902,560			

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	4,674,476
2	Enter amount from Part I, line 27a	2	251,888
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3	4	4,926,364
5	Decreases not included in line 2 (itemize) ▶ _____	5	23,804
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	4,902,560

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	186,138
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	7,848

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	346,158	6,499,041	0 053263
2013	397,077	5,890,538	0 067409
2012	377,236	5,289,290	0 071321
2011	465,063	5,096,279	0 091255
2010	278,641	4,574,304	0 060914

2	Total of line 1, column (d).	2	0 344162
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 068832
4	Enter the net value of noncharitable-use assets for 2015 from Part X, line 5.	4	6,420,527
5	Multiply line 4 by line 3.	5	441,938
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	4,389
7	Add lines 5 and 6.	7	446,327
8	Enter qualifying distributions from Part XII, line 4.	8	486,506

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	4,389
c		All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)			
2		Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	
3		Add lines 1 and 2.		3	4,389
4		Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	
5		Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	4,389
6		Credits/Payments			
a	2015 estimated tax payments and 2014 overpayment credited to 2015		6a	4,800	
b	Exempt foreign organizations—tax withheld at source.		6b		
c	Tax paid with application for extension of time to file (Form 8868).		6c		
d	Backup withholding erroneously withheld.		6d		
7		Total credits and payments. Add lines 6a through 6d.		7	4,800
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	411
11		Enter the amount of line 10 to be Credited to 2015 estimated tax 411 Refunded		11	

Part VII-A

Statements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		Yes	No
		1a		No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)?			No
	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.			
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 \$ _____ (2) On foundation managers \$ _____			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ _____			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? 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		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? 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): PA			
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 ▶N/A	13	Yes	
14	The books are in care of ▶ISRAEL SCHWAB Located at ▶3525 N 6TH STREET HARRISBURG PA Telephone no ▶(717) 233-8083 ZIP+4 ▶17110			
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)? ☐ 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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015.</i>) ☐	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
See Additional Data Table				

2

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

(a) Name and address of each employee paid more than \$50,000	Title, and average hours per week (b) devoted to position	(c) Compensation	Contributions to employee benefit plans and deferred compensation (d)	Expense account, (e) other allowances
NONE				

Total

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

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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.

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 N/A	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3.	

Part X

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	6,427,879
b	Average of monthly cash balances.	1b	90,423
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	6,518,302
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets.	2	
3	Subtract line 2 from line 1d.	3	6,518,302
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	97,775
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	6,420,527
6	Minimum investment return. Enter 5% of line 5.	6	321,026

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	321,026
2a	Tax on investment income for 2015 from Part VI, line 5.	2a	4,389
b	Income tax for 2015 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	4,389
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	316,637
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	316,637
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	316,637

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	486,506
b	Program-related investments—total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
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	486,506
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	4,389
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	482,117

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				316,637
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only.				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2015				
a From 2010.	59,112			
b From 2011.	214,729			
c From 2012.	119,309			
d From 2013.	109,257			
e From 2014.	30,712			
f Total of lines 3a through e.	533,119			
4 Qualifying distributions for 2015 from Part XII, line 4	\$ 486,506			
a Applied to 2014, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).				
d Applied to 2015 distributable amount.				316,637
e Remaining amount distributed out of corpus	169,869			
5 Excess distributions carryover applied to 2015 (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	702,988			
b Prior years' undistributed income Subtract line 4b from line 2b.				
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.				
d Subtract line 6c from line 6b Taxable amount—see instructions.				
e Undistributed income for 2014 Subtract line 4a from line 2a Taxable amount—see instructions.				
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).				
8 Excess distributions carryover from 2010 not applied on line 5 or line 7 (see instructions).	59,112			
9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a.	643,876			
10 Analysis of line 9				
a Excess from 2011.	214,729			
b Excess from 2012.	119,309			
c Excess from 2013.	109,257			
d Excess from 2014.	30,712			
e Excess from 2015.	169,869			

Part XIV

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)

		Prior 3 years				(e) Total
		(a) 2015	(b) 2014	(c) 2013	(d) 2012	
2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
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))

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 e-mail address of the person to whom applications should be addressed

ISRAEL SCHWAB
PO BOX 5796
HARRISBURG, PA 17110
(717) 233-8083

b The form in which applications should be submitted and information and materials they should include
A LETTER STATING REQUEST FOR FUNDS AND EXPLANATION OF NEED

c Any submission deadlines
APPLICATIONS ARE ACCEPTED AT ANY TIME

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

NONE

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

Form **990-PF** (2015)

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount		
1 Program service revenue						
a _____						
b _____						
c _____						
d _____						
e _____						
f _____						
g Fees and contracts from government agencies						
2 Membership dues and assessments.						
3 Interest on savings and temporary cash investments			14	6		
4 Dividends and interest from securities. . . .			14	274,500		
5 Net rental income or (loss) from real estate						
a Debt-financed property.						
b Not debt-financed property.						
6 Net rental income or (loss) from personal property						
7 Other investment income.						
8 Gain or (loss) from sales of assets other than inventory			18	186,138		
9 Net income or (loss) from special events						
10 Gross profit or (loss) from sales of inventory						
11 Other revenue a _____						
b _____						
c _____						
d _____						
e _____						
12 Subtotal Add columns (b), (d), and (e). . .				460,644		
13 Total. Add line 12, columns (b), (d), and (e).			13	460,644		

(See worksheet in line 13 instructions to verify calculations)

[illegible]

4. 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?

(1) Cash.

(2) Other assets.

(1) Sales of assets to a noncharitable exempt organization.

(2) Purchases of assets from a noncharitable exempt organization.

(3) Rental of facilities, equipment, or other assets.

(4) Reimbursement arrangements.

(5) Loans or loan guarantees.

(6) Performance of services or membership or fundraising solicitations.

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.

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

(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.

***** 2016-05-02 *****

Signature of officer or trustee Date Title

May the IRS discuss this return with the preparer shown below
(see instr)? ☒ Yes ☐ No

Form **990-PF** (2015)

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)
OPPENHEIMER RISING DIV FDS INC CL A	P	2009-10-26	2015-02-26
MICROSOFT CORP	P	1993-02-07	2015-11-16
CALL MCDONALDS CORP	P	2015-10-22	2015-11-20
OPPENHEIMER RISING DIV FDS INC CL A	P	2010-01-15	2015-04-24
MICROSOFT CORP	P	1999-12-22	2015-11-16
OPPENHEIMER COMMODITY STRATEGY TOTAL	P	2010-04-30	2015-04-24
MICROSOFT CORP	P	2003-07-25	2015-11-16
POWERSHARES QQQ TR ETF	D	2008-09-29	2015-04-07
CALL APPLE INC	P	2015-04-27	2015-04-28
ZOETIS INC	D	1996-12-09	2015-04-07

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)
50,000		32,407	17,593
30,126		1,572	28,554
550		5	545
30,000		20,652	9,348
11,892		230	11,662
45,000		68,136	-23,136
7,531		22	7,509
5,180		1,930	3,250
505		35	470
15,679		558	15,121

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	
			17,593
			28,554
			545
			9,348
			11,662
			-23,136
			7,509
			3,250
			470
			15,121

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)
CALL GENERAL ELECTRIC CO	P	2015-04-10	2015-04-17
ISRAEL BOND	P	2005-05-01	2015-05-12
CALL MCDONALDS CORP	P	2015-02-26	2015-04-17
FUNDAMENTAL INVS INC CL A	P	2009-09-01	2015-08-06
CALL APPLE INC	P	2015-07-21	2015-07-24
INVESTMENT CO AMERICA	P	2009-09-01	2015-08-06
CALL CUMMINS INC	P	2015-07-21	2015-07-31
OPPENHEIMER FUNDAMENTAL ALTERNATIVES	P	2009-08-31	2015-08-06
CALL MICROSOFT CORP	P	2015-07-21	2015-07-24
CAPITAL INCOME BLDR	P	2009-07-07	2015-10-28

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)
974		466	508
25,000		25,000	
475			475
20,000		10,990	9,010
300			300
20,000		12,548	7,452
300			300
25,000		22,398	2,602
490		30	460
15,000		10,660	4,340

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	
			508
			475
			9,010
			300
			7,452
			300
			2,602
			460
			4,340

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)
CALL MCDONALDS CORP	P	2015-08-19	2015-10-14
OPPENHEIMER FUNDAMENTAL ALTERNATIVES	P	2009-10-01	2015-10-28
CALL APPLE INC	P	2015-10-23	2015-10-30
GOLDMAN SACHS MLP ENERGY RENAISSANCE	P	2014-12-29	2015-02-05
CALL APPLE INC	P	2015-10-09	2015-10-30
FIRST ENERGY CORP	P	1988-02-02	2015-10-15
CALL ALTRIA	P	2015-10-09	2015-11-20
MICROSOFT CORP	P	1993-02-07	2015-10-15
CALL CHEVRON	P	2015-10-09	2015-11-20
GENERAL ELECTRIC CO	P	1988-02-02	2015-11-20

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)
525		75	450
15,000		13,770	1,230
315		15	300
23,974		20,940	3,034
400		788	-388
21,813		9,875	11,938
515		250	265
34,617		1,911	32,706
345			345
43,994		4,883	39,111

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	
			450
			1,230
			300
			3,034
			-388
			11,938
			265
			32,706
			345
			39,111

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)	How acquired P—Purchase (b) D—Donation	Date acquired (c) (mo , day, yr)	(d) Date sold (mo , day, yr)
CALL APPLE INC	P	2015-10-30	2015-11-20

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

(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)
784			784

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			(I) 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	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
			784

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

(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
ISRAEL SCHWAB	PRESIDENT 1 00	0	0	0
2525 NORTH 7TH STREET HARRISBURG,PA 17110				
ANDREW SCHWAB	SEC/TREAS 0 00	0	0	0
PO BOX 5796 HARRISBURG,PA 17110				
MICHAEL SCHWAB	TRUSTEE 1 00	0	0	0
PO BOX 5796 HARRISBURG,PA 17110				
DANIEL SCHWAB	TRUSTEE 0 00	0	0	0
PO BOX 5796 HARRISBURG,PA 17110				
AMY SILFEN	TRUSTEE 0 00	0	0	0
PO BOX 5796 HARRISBURG,PA 17110				

TY 2015 Accounting Fees Schedule**Name:** SCHWAB-SILFEN FOUNDATION**EIN:** 23-6401901

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
MARTIN M SACKS ASSOC , CPA'S				
ACCTG SRVCS/PREP OF FORM 990-PF	5,900	1,770		4,130

TY 2015 Investments Corporate Stock Schedule

Name: SCHWAB-SILFEN FOUNDATION
EIN: 23-6401901

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ALTRIA GROUP INC	6,917	58,210
APPLE INC	58,131	73,682
AT&T CORP	23,200	34,410
BANK OF AMERICA CORP	15,288	16,830
CHEVRON CORPORATION	64,193	53,976
CITIGROUP INC	39,474	51,750
CUMMINS INC	42,758	44,005
EXXON MOBIL CORP	87,729	155,900
EXXON MOBIL CORP	8,350	77,950
FIRSTENERGY CORP		
GENERAL ELECTRIC COMPANY	35,805	342,650
GENERAL ELECTRIC COMPANY	4,883	46,725
INTERNATIONAL BUSINESS MACHINES CO	6,686	27,524
INTERNATIONAL BUSINESS MACHINES CO	40,004	27,524
J P MORGAN CHASE & CO	22,431	132,060
JOHNSON & JOHNSON	2,826	61,632
MARATHON OIL CORP	9,678	18,885
MCDONALDS CORP	44,893	59,070
MICROSOFT CORP	3,091	186,579
PEPCO HOLDINGS INC	9,552	13,005
PFIZER INC	17,018	32,829
RITE AID CORP	2,227	44,531
TECO ENERGY, INC	13,758	53,300
UGI CORP	890	5,064
VERIZON COMMUNICATIONS	4,340	24,404
ZOETIS, INC		
AMCAP FUND INC CL A	41,572	48,317
AMERICAN FDS DEVELOPING WORLD GROW	86,616	70,892
AMERICAN FDS GLOBAL BALANCED FUND	34,575	37,118
CAPITAL WORLD BOND FUND CL A	56,255	50,765

Name of Stock	End of Year Book Value	End of Year Fair Market Value
CAPITAL INCOME BUILDER FUND CL A	83,381	96,739
CAPITAL WORLD GROWTH & INCOME FUND	86,783	115,478
EUROPACIFIC GROWTH FUND CL A	76,927	89,026
FUNDAMENTAL INVESTORS FUND CL A	67,978	95,882
GOLDMAN SACHS CAPITAL GROWTH FUND	75,423	104,609
GROWTH FUND OF AMERICA CL A	82,587	114,567
INCOME FUND AMERICA INC CLASS A	35,843	40,600
INTERMEDIATE BOND FUND OF AMERICA	36,793	36,080
INTERNATIONAL GROWTH AND INCOME FU	87,944	85,342
INVESTMENT COMPANY OF AMERICA FUND	66,092	78,256
ISHARES TIP BOND FUND	50,446	54,840
ISHARES 7-10 YEAR TREAS BOND FUND	53,832	63,354
ISHARES 1-3 YEAR TREAS BOND FUND	50,322	50,616
ISHARES SELECT DIVIDENDS INDEX FUN	39,046	75,150
ISHARES US REAL ESTATE INDEX FUND	30,493	60,064
ISHARES MSCI EAFE INDEX FUND	35,869	46,976
ISHARES MSCI EMERGING MKTS INDEX F	31,175	32,190
ISHARES RUSSELL 2000 INDEX FUND	33,660	67,572
NEW ECOMONY FUND CL SBI CL A	61,335	75,716
NEW PERSPECTIVE FUND CL A	78,985	106,472
NEW WORLD FUND CL A	106,074	108,434
OPPENHEIMER COMMODITY STRATEGY TOT	29,203	15,060
OPPENHEIMER DEVELOPING MARKETS FUN	105,717	107,924
OPPENHEIMER EQUITY INCOME FUND CL	88,131	97,553
OPPENHEIMER INTL BOND FUND CL A	131,763	111,421
OPPENHEIMER INTL GROWTH FUND CL A	80,241	116,761
OPPENHEIMER MAIN STREET OPPORTUNIT	42,203	60,129
OPPENHEIMER INTERNATIONAL VALUE FU	84,138	91,635
OPPENHEIMER FUNDAMENTAL ALT FD CL	65,817	69,903
OPPENHEIMER REAL ESTATE FUND CL A	76,535	113,504

Name of Stock	End of Year Book Value	End of Year Fair Market Value
OPPENHEIMER RISING DIVIDENDS FUND	185,264	213,781
OPPENHEIMER INTL SMALL MLP MID CO	165,117	174,510
OPPENHEIMER STEELPATH MLP ALPHA FU	177,863	126,453
POWERSHARES QQQ SERIES 1		
SHORT TERM BOND FUND AMERICA INC C	53,479	52,820
SMALLCAP WORLD FUND CL A	189,999	212,599
SPDR DOW JONES INDL AVERAGE ETF	33,249	69,596
SPDR DOW JONES REIT ETF	39,981	109,956
VANGUARD REIT ETF	45,560	103,649
WASHINGTON MUTUAL INVESTORS FUND C	94,408	138,023
BLACKROCK UTILITY & INFRASTRUCTURE	54,471	50,340
BLACKROCK GLOBAL OPPORTUNITIES EQU	27,483	25,520
BLACKROCK MULTI-SECTOR INCOME TRUS	18,675	15,810
BLACKROCK SCIENCE & TECHNOLOGY	35,589	34,620
CENTER COAST MLP & INFRASTRUCTURE	17,240	10,120
CLEARBRIDGE AMERICAN ENERGY MLP FU	31,620	20,475
CLEARBRIDGE ENERGY MLP FUND	131,779	91,080
CLEARBRIDGE ENERGY MLP OPPORTUNITY	95,005	63,350
CLEARBRIDGE ENERGY MLP TOTAL RETUR	66,256	36,930
COHEN & STEERS QUALITY INCOME REAL	11,370	12,220
DUFF & PHELPS GLOBAL UTILITY INCOM	35,666	29,460
FIRST TRUST DYNAMIC EUROPE EQUITY	18,070	17,160
GOLDMAN SACHS MLP INCOME OPPORTUNI	30,120	12,345
GOLDMAN SACHS MLP ENERGY RENAISSAN		
INVESCO DYNAMIC CR OPPORTUNITIES F	12,772	10,550
ISHARES GLOBAL 100 INDEX FUND	18,659	21,849
ISHARES MSCI EAFE INDEX	46,502	41,104
ISHARES MSCI EMERGING MARKETS	102,429	80,475
MORGAN STANLEY INCOME SECURITIES I	57,905	50,610
NUVEEN ALL CAP ENERGY MLP OPPORTUN	37,932	13,940

Name of Stock	End of Year Book Value	End of Year Fair Market Value
NUVEEN ENERGY MLP TOTAL RETURN FUN	20,160	11,100
NUVEEN PREFERRED INCOME OPPORTUNIT	30,000	18,320
NUVEEN BUILD AMERICA BOND OPPTY FU	32,469	30,435
NUVEEN S&P 500 BUY-WRITE INC	12,811	13,135
PIMCO DYNAMIC CR INCOME FUND	49,568	36,060
SPDR S&P INTL ET DIVIDEND	45,650	33,360
TELKA HEALTHCARE OPPORT FUND	19,650	17,390
TORTOISE MLP FUND INC	26,881	17,360

TY 2015 Investments - Other Schedule

Name: SCHWAB-SILFEN FOUNDATION

EIN: 23-6401901

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
STATE OF ISRAEL BONDS			

TY 2015 Other Decreases Schedule

Name: SCHWAB-SILFEN FOUNDATION

EIN: 23-6401901

Description	Amount
ADJUST FMV OF NON-CASH CONTRIBUTION TO COST BASIS	23,804

TY 2015 Other Expenses Schedule

Name: SCHWAB-SILFEN FOUNDATION

EIN: 23-6401901

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXPENSES				
OFFICE SERVICES	6,451	3,225		3,226
PA FILING FEE	15			15
INVESTMENT EXPENSE	14,449	14,449		

TY 2015 Taxes Schedule**Name:** SCHWAB-SILFEN FOUNDATION**EIN:** 23-6401901

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FED'L EXCISE TAX ON NET INV INC	5,517			
FOREIGN TAX WITHHELD ON DIVIDEND	2,272	2,272		

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 SCHWAB-SILFEN FOUNDATION	Employer identification number 23-6401901
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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
--	---

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 SCHWAB-SILFEN FOUNDATION	Employer identification number 23-6401901
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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	D & H DISTRIBUTING COMPANY	\$ 230,000	Person ☒
	2525 N SEVENTH STREET		Payroll ☐
	HARRISBURG, PA 17110		Noncash ☐ (Complete Part II for noncash contributions)
2	JARB	\$ 20,147	Person ☐
	POST OFFICE BOX 5796		Payroll ☐
	HARRISBURG, PA 17110		Noncash ☒ (Complete Part II for noncash contributions)
3	D & H CARES	\$ 49,863	Person ☒
	2525 N SEVENTH STREET		Payroll ☐
	HARRISBURG, PA 17110		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 SCHWAB-SILFEN FOUNDATION	Employer identification number 23-6401901
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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
2	363 SHARES MICROSOFT CORP	\$ 20,147	2015-12-16
(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 SCHWAB-SILFEN FOUNDATION	Employer identification number 23-6401901
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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	
-			
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-			
(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	
-			
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-			
(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	
-			
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-			
(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	
-			
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SCHWAB-SILFEN FOUNDATION

23-6401901

FORM 990-PF - 2015

PART XV, LINE 3a, CONTRIBUTIONS PAID DURING THE YEAR

<u>Donee</u>	<u>Amount</u>
American Cancer Society 2 Lemoyne Drive, Suite 101 Lemoyne, PA 17043	\$1,000
American Heart Association 1019 Mumma Drive Wormleysburg, PA 17043	1,000
American Red Cross 1804 N. Sixth Street Harrisburg, PA 17110	1,000
Anti-Defamation League PO Box 96226 Washington, DC 20090-6226	45,000
Arthritis Foundation of Central PA 3544 N. Progress Ave., Suite 204 Harrisburg, PA 17110	250
Autism Society Greater Harrisburg Area PO Box 101 Enola, PA 17025	1,000
Autism Society of America Greater Harrisburg Chapter PO Box 101 Enola, PA 17025	4,000
BBYO Passport - B'nai B'rith Youth Organization 5185 MacArthur Blvd., NW #640 Washington, DC 20016	200
Beth El Congregation 8101 Park Heights Avenue Baltimore, MD 21208-1799	4,200
Beth El Temple 2637 N. Front St. Harrisburg, PA 17110	4,387
Bethesda Mission 2101 N. Front Street Building 1, Suite 301 Harrisburg, PA 17110	1,000

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PART XV, LINE 3a, CONTRIBUTIONS PAID DURING THE YEAR

<u>Donee</u>	<u>Amount</u>
Big Brothers Big Sisters of Capital Region 1500 N. 2nd Street, Suite H Harrisburg, PA 17101	\$2,500
Big Brothers Big Sisters of the Triangle 909 Aviation Pkwy., Ste 1500 Morrisville, NC 27560	1,000
Caitlin's Smiles 3303 N. Sixth Street Harrisburg, PA 17110	100
Cal Ripken, Sr. Foundation 1427 Clarkview Road, Suite 100 Baltimore, MD 21209	32,800
Camp Koala 201 N. Hanover Street Carlisle, PA 17013	2,250
Capital Region Economic Development Corp 3211 N. Front St., Suite 201 Harrisburg, PA 17110	2,500
CATRA-Thon - Capital Area Therapeutic Riding Assoc. 168 Station Road Grantville, PA 17028	250
Children's Miracle Network C/O Birdies for Babies 600 Center View Lane Hershey, PA 17033	8,000
Chisuk Emuna Congregation PO Box 5507 Harrisburg, PA 17110	13,583
Crohn's & Colitis Foundation of America Illinois Chapter 2200 E. Devon Ave., Suite 392 Des Plaines, IL 60018	250
Cultural Enrichment Fund PO Box 12084 Harrisburg, PA 17108-2084	2,500

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PART XV, LINE 3a, CONTRIBUTIONS PAID DURING THE YEAR

Donee	Amount
Daniel B. Allanoff Foundation PO Box 404 Lafayette Hill, PA 19444	\$2,500
Dauphin County Library System Community Relations Department 101 Walnut Street Harrisburg, PA 17101	100
Dog T.A.G.S. 1 Souder Court Mechanicsburg, PA 17050	500
Ellen Ray Greenburg Fund C/O Colonial School District 230 Flourtown Road Plymouth Meeting, PA 19462	1,000
Fairleigh Dickinson University 1000 River Road, H-DH3-12 Teaneck, NJ 07666	1,500
Friends of Israel Defense Forces 500 Office Center Drive, Suite 400 Fort Washington, PA 19034	1,500
Gretna Theatre 4830 Londonderry Road Harrisburg, PA 17109	1,000
HACC Foundation One HACC Drive Harrisburg, PA 17110	2,500
Hadassah Harrisburg Chapter 3432 Green Street Harrisburg, PA 17011	1,000
Hadassah Medical Relief Association, Inc. 40 Wall Street New York, NY 10005	300
Harrisburg Holocaust Monument 2155 Bordeaux Court Harrisburg, PA 17112	1,600

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PART XV, LINE 3a, CONTRIBUTIONS PAID DURING THE YEAR

Donee	Amount
Harrisburg Jewish Film Festival 3301 N. Front Street Harrisburg, PA 17110	\$1,000
Harrisburg Young Professionals PO Box 11851 Harrisburg, PA 17108	300
Healthy Steps Diaper Bank 6400 Colchester Avenue Harrisburg, PA 17111	250
Historic B'nai Jacob Synagogue 121 Shirley Drive Middletown, PA 17057	100
Humane Society of Harrisburg Area, Inc. 7790 Grayson Road Harrisburg, PA 17111	750
Jake Gittlen Cancer Institute 4331 S. Victoria Way Harrisburg, PA 17112	1,250
Jewish Community Foundation of Central PA 3301 N. Front Street Harrisburg, PA 17110	4,600
Jewish Community Center-Harrisburg 3301 N. Front Street Harrisburg, PA 17110	100
Jewish Day School 1901 East Jefferson Street Rockville, MD 20852	500
Jewish Federation of Greater Harrisburg 3301 N. Front Street Harrisburg, PA 17110	189,715
Jewish Fed. of South Palm Beach County 9901 Klein Blvd. Boca Raton, FL 33428-1788	6,000
Jewish Home of Greater Harrisburg 4000 Linglestown Road Harrisburg, PA 17112	500

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PART XV, LINE 3a, CONTRIBUTIONS PAID DURING THE YEAR

<u>Donee</u>	<u>Amount</u>
Jewish National Fund Jewish Community Services Bldg 2100 Arch Street, 3rd Floor Philadelphia, PA 19103	\$2,250
Levindale Auxiliary 2434 West Belvedere Avenue Baltimore, MD 21215	300
Little Friends Autism Center 140 N. Wright Street Naperville, IL 60540	640
Making Strides Against Breast Cancer of Harrisburg 3211 N. Front Street, Suite 100 Harrisburg, PA 17110	6,000
March of Dimes Central Division 160 South Progress Avenue, 1C Harrisburg, PA 17109	2,500
Maryland Alumni Association Samuel Riggs IV Alumni Center College Park, MD 20742	2,500
Montgomery Hospice 1355 Piccard Drive, Suite 100 Rockville, MD 20850	1,000
Multiple Sclerosis Research Institute Penn Treaty Park Place 1341 N. Delaware Avenue, Suite 213 Philadelphia, PA 19125	200
Muscular Dystrophy Association 2080 Linglestown Road, Suite 104 Harrisburg, PA 17110	2,500
National MS Society, Central PA 2040 Linglestown Road, Suite 104 Harrisburg, PA 17110	500
Operation Gratitude 16444 Refugio Road Encino, CA 91436	200

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PART XV, LINE 3a, CONTRIBUTIONS PAID DURING THE YEAR

Donee	Amount
PA Wounded Warriors 805 Adelia Street Middletown, PA 17057	\$800
Penn State Hershey Cancer Institute PO Box 852 Hershey, PA 17033	1,000
Penn State University 1 Old Main University Park, PA 16802	1,500
Pine Street Presbyterian 310 N. Third Street Harrisburg, PA 17101	250
Play for P.I.N.K. 175 E. 74th Street, #17B New York, NY 10021	3,000
Please Live PO Box 1281 Mechanicsburg, PA 17055	500
Rabbi David L. Silver Yeshiva Academy 3301 N. Front Street Harrisburg, PA 17110	2,500
Rettsyndrome.org PO Box 706143 Cincinnati, OH 45270-6143	250
Riley's Toy Foundation 1131 Dry Powder Circle Mechanicsburg, PA 17050	250
Ronald McDonald House Charities 745 West Governor Road Hershey, PA 17033	2,750
Salvation Army PO Box 2771 Harrisburg, PA 17105	250
Scares that Care PO Box 220 Newport, PA 17074	250

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PART XV, LINE 3a, CONTRIBUTIONS PAID DURING THE YEAR

Donee	Amount
Special Olympics - Pennsylvania Area M PO Box 382 Summerdale, PA 17093	\$5,000
South Central PA Sickle Cell Council of Harrisburg 2000 Linglestown Road, Suite 204 Harrisburg, PA 17110	500
Susquehanna Service Dogs 1078 Gravel Hill Road Grantville, PA 17028	3,200
Taharas Mishpochah Building Fund 3601 N. Fourth Street Harrisburg, PA 17110	100
Temple Beth Shalom 913 Allendale Road Mechanicsburg, PA 17055	3,960
The Associated Jewish Charities of Baltimore 101 W. Mount Royal Avenue Baltimore, MD 21201	2,600
The Birthright Israel Foundation 33 East 33rd Street, 7th Floor New York, NY 10016	200
University of Pennsylvania 3451 Walnut Street 601 Franklin Building Philadelphia, PA 19104	80,000
Vickie's Angel Foundation 511 Bridge Street PO Box 174 New Cumberland, PA 17070	500
Wilkes University ASB Department 824685 PO Box 71335 Philadelphia, PA 19176-9660	500

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PART XV, LINE 3a, CONTRIBUTIONS PAID DURING THE YEAR

<u>Donee</u>	<u>Amount</u>
Wounded Warrior Patrol PO Box 85 Wellsville, PA 17365	\$1,350
World T.E.A.M. Sports 4250 Veterans Memorial Highway Holbrook, NY 11741	500
Y.W.C.A. Harrisburg 1101 Market Street Harrisburg, PA 17103	500
Young Survival Coalition 80 Broad Street, Suite 1700 New York, NY 10004	500
Youth Advocate Dauphin Clinic 2030 North Third Street Harrisburg, PA 17102	500
	<u>\$479,135</u>