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

Name of foundation SANFORD P & IRENE F BURNSTEIN FOUNDATION SANFORD P BURNSTEIN TRUSTEE % SANFORD BURNSTEIN		A Employer identification number 73-6247047	
Number and street (or P O box number if mail is not delivered to street address) 4110 S ROCKFORD AVE		Room/suite	
City or town, state or province, country, and ZIP or foreign postal code TULSA, OK 74105		B Telephone number (see instructions)	
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) \$ 32,435,621		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)	2,420,046			
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	2,247	2,178		
	4 Dividends and interest from securities	668,734	668,734		
	5a Gross rents	114	114		
	b Net rental income or (loss) 114				
	6a Net gain or (loss) from sale of assets not on line 10	623,421			
	b Gross sales price for all assets on line 6a 22,278,238				
	7 Capital gain net income (from Part IV, line 2)		623,421		
	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)	 78,281	72,251		
	12 Total.Add lines 1 through 11	3,792,843	1,366,698		
	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).	 10,000	10,000	0	0
	c Other professional fees (attach schedule)	 187,117	187,117		
	17 Interest	82,496	82,496		
	18 Taxes (attach schedule) (see instructions)	 11,461	1,361		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings.				
	22 Printing and publications				
	23 Other expenses (attach schedule).	 67,019	60,482		
	24 Total operating and administrative expenses. Add lines 13 through 23	358,093	341,456	0	0
	25 Contributions, gifts, grants paid	1,122,450			1,122,450
	26 Total expenses and disbursements.Add lines 24 and 25	1,480,543	341,456	0	1,122,450
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	2,312,300			
	b Net investment income (if negative, enter -0-)		1,025,242		
	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	2,449,985	338,283	338,283
	2	Savings and temporary cash investments			
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____	9,047		
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions).			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)			
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	24,060,686	26,006,167	32,097,338
	Liabilities	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)	26,519,718	26,344,450	32,435,621
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			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	26,519,718	26,344,450	
	30	Total net assets or fund balances(see instructions)	26,519,718	26,344,450	
	31	Total liabilities and net assets/fund balances(see instructions)	26,519,718	26,344,450	

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 26,519,718
2	Enter amount from Part I, line 27a	2 2,312,300
3	Other increases not included in line 2 (itemize) ▶ _____	3
4	Add lines 1, 2, and 3	4 28,832,018
5	Decreases not included in line 2 (itemize) ▶ _____	5 2,487,568
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6 26,344,450

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	623,421
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	1,208,990	26,593,005	0 045463
2013	923,915	23,688,655	0 039002
2012	130,853	17,197,806	0 007609
2011	806,102	16,245,988	0 049619
2010	576,799	11,060,024	0 052152

2 Total of line 1, column (d).	2	0 193845
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 038769
4 Enter the net value of noncharitable-use assets for 2015 from Part X, line 5.	4	29,285,878
5 Multiply line 4 by line 3.	5	1,135,384
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	10,252
7 Add lines 5 and 6.	7	1,145,636
8 Enter qualifying distributions from Part XII, line 4.	8	1,122,450

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	20,505
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	20,505
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	20,505
6 Credits/Payments		
a 2015 estimated tax payments and 2014 overpayment credited to 2015	6a	21,112
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	25,112
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	4,607
11 Enter the amount of line 10 to be Credited to 2015 estimated tax ▶ 4,607 Refunded ▶	11	

Part VII-A **Statements Regarding Activities**

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

Part VII-A Statements Regarding Activities (continued)

11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► _____	13	Yes	
14 The books are in care of ► <u>SANFORD BURNSTEIN</u> Telephone no ► <u>(918) 836-3131</u> Located at ► <u>PO BOX 582527 TULSA OK</u> ZIP+4 ► <u>741582527</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)? 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

No

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
SANFORD P IRENE BURNSTEIN PO BOX 582527 TULSA,OK 74158	TRUSTEES 0	0		

2

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

(a) Name and address of each employee paid more than \$50,000	Title, and average hours per week (b) devoted to position	(c) Compensation	Contributions to employee benefit plans and deferred compensation (d)	Expense account, (e) other allowances

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

Part VIII

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
SUSAN SAVAGE 1334 North Lansing Ave TULSA, OK 74106	0	51,500
Total number of others receiving over \$50,000 for professional services. ▶		1

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 ▶	

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	28,137,169
b	Average of monthly cash balances.	1b	1,594,687
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	29,731,856
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	29,731,856
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	445,978
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	29,285,878
6	Minimum investment return. Enter 5% of line 5.	6	1,464,294

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	1,464,294
2a	Tax on investment income for 2015 from Part VI, line 5.	2a	20,505
b	Income tax for 2015 (This does not include the tax from Part VI).	2b	2,789
c	Add lines 2a and 2b.	2c	23,294
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	1,441,000
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	1,441,000
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	1,441,000

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	1,122,450
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	1,122,450
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	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	1,122,450

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				1,441,000
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only.			223,885	
b Total for prior years 2013 , 2012 , 2011		0		
3 Excess distributions carryover, if any, to 2015				
a From 2010.				
b From 2011.				
c From 2012.				
d From 2013.				
e From 2014.				0
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2015 from Part XII, line 4 ▶ \$ 1,122,450				
a Applied to 2014, but not more than line 2a			223,885	
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.				898,565
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:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
b Prior years' undistributed income Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2014 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015				542,435
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).				
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.	0			

Part XIV

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b

Tax year	Prior 3 years			(e) Total
(a) 2015	(b) 2014	(c) 2013	(d) 2012	

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Part XV

1

Contributed more than 2% of the total contributions received by the foundation
 (or have contributed more than \$5,000) (See section 507(d)(2))

10% or more of the stock of a corporation (or an equally large portion of the stock of a partnership) in which the foundation has a 10% or greater interest

2

Contributions to preselected charitable organizations and does not accept or make gifts, grants, etc. (see instructions) to individuals or organizations under

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

mitted and information and materials they should include

as by geographical areas, charitable fields, kinds of institutions, or other

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	1,122,450
b Approved for future payment				
Total			3b	

Enter gross amounts unless otherwise indicated

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

[illegible]

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?

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

[illegible]

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

b If "Yes," complete the following schedule

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

Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.		
	***** _____ Signature of officer or trustee	2016-11-08 _____ Date	***** _____ Title

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

May the IRS discuss this return with the preparer shown below

(see instr)? ☒ Yes ☐ No

Paid Preparer Use Only	Print/Type preparer's name ROBERT SOZA CPA	Preparer's Signature	Date	Check if self-employed ☐	PTIN P00496569
	Firm's name ☐ MARINER CONSULTING LLC			Firm's EIN ☐	
	Firm's address ☐ 4200 EAST SKELLY DRIVE SUITE 960 TULSA, OK 74135			Phone no (918) 388-1655	

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)
ACP INST SER STRAT OPP FUND	P		2015-01-05
SEE STATEMENT D-1	P		
SEE STATEMENT D-2	P		
SEE STATEMENT D-3	P		
ASIA ALTERNATIVES IV	P		
CAPITAL GAIN DIVIDENDS	P		

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	Gain or (loss) (h) (e) plus (f) minus (g)
354,998		350,000	4,998
18,589,921		18,649,727	-59,386
136,713		152,602	-15,889
2,773,968		2,482,677	291,291
29,651		20,231	9,420
			332,613

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	
			4,998
			-59,806
			-15,889
			291,291
			9,420

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
AMERICAN CANCER SOCIETY 4110 S 100TH E AVE TULSA,OK 74146	NONE	PC	GENERAL OPERATIONS	300
AMERICAN RED CROSS 10151 E 11TH ST TULSA,OK 74128	NONE	PC	GENERAL OPERATIONS	5,000
AOPA AIR SAFETY FOUNDATION 421 AVIATION WAY FREDERICK,MD 21701	NONE	PC	GENERAL OPERATIONS	200
CONGREGATION B'NAI EMUNAH 1719 S OWASSO AVE TULSA,OK 74120	NONE	PC	GENERAL OPERATIONS	1,500
TULSA DAY CENTER FOR THE HOMELESS 415 WARCHER ST TULSA,OK 74103	NONE	PC	GENERAL OPERATIONS	10,000
DVIS 4300 S HARVARD AVE 100 TULSA,OK 74135	NONE	PC	GENERAL OPERATIONS	15,000
EMERGENCY INFANT SERVICES 222 S HOUSTON AVE TULSA,OK 74127	NONE	PC	GENERAL OPERATIONS	10,000
FALCON FOUNDATION 3116 ACADEMY DR 200 US AIR FORCE ACADEMY,CO 80840	NONE	PC	GENERAL OPERATIONS	5,000
FAMILY AND CHILDREN'S SERVICES 6202 S LEWIS AVE TULSA,OK 74136	NONE	PC	GENERAL OPERATIONS	10,000
COMMUNITY FOOD BANK OF EASTERN OKLAHOMA 1304 N KENOSHA AVE TULSA,OK 74106	NONE	PC	GENERAL OPERATIONS	25,000
GILCREASE MUSEUM 1400 N GILCREASE MUSEUM ROAD TULSA,OK 74127	NONE	PC	GENERAL OPERATIONS	10,000
HILLEL 800 EIGHTH STREET NW WASHINGTON,DC 200013724	NONE	PC	GENERAL OPERATIONS	2,000
JEWISH FEDERATION OF TULSA 2021 E 71ST ST TULSA,OK 74136	NONE	PC	GENERAL OPERATIONS	55,000
JUNIOR ACHIEVEMENT 3947 S 103RD E AVE TULSA,OK 74146	NONE	PC	GENERAL OPERATIONS	300
MAKE-A-WISH FOUNDATION 4504 E 67TH ST 208 TULSA,OK 74136	NONE	PC	GENERAL OPERATIONS	6,000
Total ▶ 3a				1,122,450

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 Paid during the year				
MAYO CLINIC DEPARTMENT OF DEVELOPMENT 200 FIRST ST SW ROCHESTER,MN 55905	NONE	PC	GENERAL OPERATIONS	5,000
MEALS ON WHEELS OF METRO TULSA 12620 E 31ST TULSA,OK 74146	NONE	PC	GENERAL OPERATIONS	5,000
NATIONAL AIR AND SPACE SOCIETY 600 INDEPENDENCE AVE SW WASHINGTON,DC 20560	NONE	PC	GENERAL OPERATIONS	250
NATIONAL PSORIASIS FOUNDATION 6600 SW 92ND AVE SUITE 300 PORTLAND,OR 972237195	NONE	PC	GENERAL OPERATIONS	5,000
NEIGHBOR FOR NEIGHBOR 505 E 36TH ST N TULSA,OK 74106	NONE	PC	GENERAL OPERATIONS	7,500
OKLAHOMA CONFERENCE FOR COMMUNITY AND JUSTICE 100 W FIFTH ST LL 1030 TULSA,OK 741034273	NONE	PC	GENERAL OPERATIONS	5,000
OETA FOUNDATION 7403 N KELLEY AVE OKLAHOMA CITY,OK 73111	NONE	PC	GENERAL OPERATIONS	5,000
OKLAHOMANS FOR EQUALITY 621 E 4TH ST TULSA,OK 74120	NONE	PC	GENERAL OPERATIONS	10,000
PARENT CHILD CENTER 1421 S BOSTON AVE TULSA,OK 74119	NONE	PC	GENERAL OPERATIONS	30,000
PHILBROOK MUSEUM OF ART 2727 S ROCKFORD RD TULSA,OK 74114	NONE	PC	GENERAL OPERATIONS	23,500
PLANNED PARENTHOOD 1007 S PEORIA AVE TULSA,OK 74120	NONE	PC	GENERAL OPERATIONS	30,000
SHERWIN MILLER MUSEUM OF JEWISH ART 2021 E 71ST ST TULSA,OK 74136	NONE	PC	GENERAL OPERATIONS	5,250
SPECIAL OLYMPICS 6835 S CANTON AVE TULSA,OK 74136	NONE	PC	GENERAL OPERATIONS	5,000
TEMPLE ISRAEL 2004 E 22ND PL TULSA,OK 74114	NONE	PC	GENERAL OPERATIONS	17,600
TULSA BALLET 1212 E 45TH PL TULSA,OK 74105	NONE	PC	GENERAL OPERATIONS	20,000
Total ▶ 3a				1,122,450

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 Paid during the year				
TULSA BOTANIC GARDENS 3900 TULSA BOTANIC DR TULSA,OK 74127	NONE	PC	GENERAL OPERATIONS	1,000
TULSA BOYS HOME 2727 S 137TH WAVE SAND SPRINGS,OK 74063	NONE	PC	GENERAL OPERATIONS	6,000
TULSA CARES 3507 E ADMIRAL PL TULSA,OK 74115	NONE	PC	GENERAL OPERATIONS	15,000
TULSA CASA 700 S BOSTON AVE 230 TULSA,OK 74119	NONE	PC	GENERAL OPERATIONS	3,000
TULSA GIRLS 1625 W 21ST ST TULSA,OK 74107	NONE	PC	GENERAL OPERATIONS	5,000
TULSA GLASS BLOWING 19 E MATHEW B BRADY ST TULSA,OK 74103	NONE	PC	GENERAL OPERATIONS	5,000
TULSA HISTORICAL SOCIETY 2445 S PEORIA AVE TULSA,OK 74114	NONE	PC	GENERAL OPERATIONS	5,000
UNIVERSITY OF TULSA 800 S TUCKER DR TULSA,OK 74104	NONE	PC	GENERAL OPERATIONS	201,250
UNITED WAY 1430 S BOULDER AVE W TULSA,OK 74119	NONE	PC	GENERAL OPERATIONS	55,000
YOUTH SERVICES OF TULSA 311 S MADISON AVE TULSA,OK 74120	NONE	PC	GENERAL OPERATIONS	15,000
TULSA JEWISH RETIREMENT & HEALTH CARE CENTER 2025 E 71ST ST TULSA,OK 74136	NONE	PC	GENERAL OPERATIONS	101,000
A NEW LEAF 2306 S 1ST PL BROKEN ARROW,OK 74012	NONE	PC	GENERAL OPERATIONS	100,000
CYSTIC FIBROSIS SOONER CHAPTER 2642 E 21ST ST SUITE 100 TULSA,OK 74114	NONE	PC	GENERAL OPERATIONS	1,000
GATESWAY FOUNDATION 1217 E COLLEGE ST BROKEN ARROW,OK 74012	NONE	PC	GENERAL OPERATIONS	5,000
GLOBAL GARDENS PO BOX 52034 TULSA,OK 74152	NONE	PC	GENERAL OPERATIONS	3,000
Total ▶ 3a				1,122,450

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 Paid during the year				
THE LITTLE LIGHT HOUSE 5120 E 36TH ST TULSA,OK 74135	NONE	PC	GENERAL OPERATIONS	6,000
ST JOHN HEALTH SYSTEM FOUNDATION 1924 S UTICA AVE TULSA,OK 74104	NONE	PC	GENERAL OPERATIONS	52,500
TARC 2516 E 71ST ST TULSA,OK 74136	NONE	PC	GENERAL OPERATIONS	15,000
TULSA AIR AND SPACE MUSEUM TULSA INTERNATIONAL AIRPORT TUL 3624 N 74TH E AVE TULSA,OK 74115	NONE	PC	GENERAL OPERATIONS	50,000
TULSA COMMUNITY FOUNDATION 7030 S YALE AVE 600 TULSA,OK 74136	NONE	PC	GENERAL OPERATIONS	50,400
TULSA LIBRARY 400 CIVIC CENTER TULSA,OK 74103	NONE	PC	GENERAL OPERATIONS	50,000
B'NAI EMMANUEL 1719 S OWASSO AVE TULSA,OK 74120	NONE	PC	GENERAL OPERATIONS	150
B'NAI EMUNAH HILLEL 1719 S OWASSO AVE TULSA,OK 74120	NONE	PC	GENERAL OPERATIONS	2,000
HUMBLE SONS BIKE COMPANY 30258 N ASPEN AVENUE BROKEN ARROW,OK 74012	NONE	PC	GENERAL OPERATIONS	10,000
KIPP TULSA COLLEGE PREPARATORY 1661 E VIRGIN STREET TULSA,OK 74106	NONE	PC	GENERAL OPERATIONS	5,000
MARCH OF DIMES 7146 S BRADEN AVE 700 TULSA,OK 74136	NONE	PC	GENERAL OPERATIONS	300
NATIONAL MS SOCIETY 4606 E 67TH ST 103 TULSA,OK 74136	NONE	PC	GENERAL OPERATIONS	200
READING PARTNERS 110 W 7TH STREET TULSA,OK 74119	NONE	PC	GENERAL OPERATIONS	15,000
STILLWATER MEDICAL CENTER FOUNDATION 1606 W 7TH AVE STILLWATER,OK 74074	NONE	PC	GENERAL OPERATIONS	10,000
WOODLAKE CHURCH 7100 E 31ST STREET TULSA,OK 74145	NONE	PC	GENERAL OPERATIONS	200
Total ▶ 3a				1,122,450

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>				
WOUNDED WARRIOR PROJECT 4899 BELFORT ROAD STE 300 JACKSONVILLE,FL 32256	NONE	PC	GENERAL OPERATIONS	50
YWCA 8145 E 17TH ST TULSA,OK 74112	NONE	PC	GENERAL OPERATIONS	5,000
Total ▶ 3a				1,122,450

TY 2015 Accounting Fees Schedule

Name: SANFORD P & IRENE F BURNSTEIN FOUNDATION
SANFORD P BURNSTEIN TRUSTEE

EIN: 73-6247047

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	10,000	10,000		

TY 2015 Contractor Compensation Explanation

Name: SANFORD P & IRENE F BURNSTEIN FOUNDATION
SANFORD P BURNSTEIN TRUSTEE

EIN: 73-6247047

Contractor	Explanation
SUSAN SAVAGE	FOUNDATION CONSULTANT

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

TY 2015 Depreciation Schedule

Name: SANFORD P & IRENE F BURNSTEIN FOUNDATION

SANFORD P BURNSTEIN TRUSTEE

EIN: 73-6247047

TY 2015 Investments - Other Schedule

Name: SANFORD P & IRENE F BURNSTEIN FOUNDATION
SANFORD P BURNSTEIN TRUSTEE

EIN: 73-6247047

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
BOK INVESTMENT ACCOUNT	AT COST	18,132,675	23,698,703
BOA INVESTMENT ACCOUNT	AT COST	7,873,492	8,398,635

TY 2015 Other Decreases Schedule

Name: SANFORD P & IRENE F BURNSTEIN FOUNDATION

SANFORD P BURNSTEIN TRUSTEE

EIN: 73-6247047

Description	Amount
UNREALIZED LOSSES	2,487,568

TY 2015 Other Expenses Schedule

Name: SANFORD P & IRENE F BURNSTEIN FOUNDATION
SANFORD P BURNSTEIN TRUSTEE

EIN: 73-6247047

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
DUES	500			
MISC EXPENSES	37			
PARTNERSHIP EXPENSES	60,482	60,482		
BOARD MEMBER REIMBURSEMENTS	6,000			

TY 2015 Other Income Schedule

Name: SANFORD P & IRENE F BURNSTEIN FOUNDATION
SANFORD P BURNSTEIN TRUSTEE

EIN: 73-6247047

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Other Income	4,746	4,746	
Ordinary Income from Partnerships	68,836	68,836	
Royalty Income from Partnerships	30	30	
Sec 1231 Gain/(Loss) from Partnerships	-33	-33	
Other Income/(Loss) from Partnerships	-1,328	-1,328	
Tax Refunds	6,030		

TY 2015 Other Professional Fees Schedule

Name: SANFORD P & IRENE F BURNSTEIN FOUNDATION
SANFORD P BURNSTEIN TRUSTEE

EIN: 73-6247047

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TRUSTEE FEES	132,004	132,004		
CONSULTING FEES	51,500	51,500		
OTHER LEGAL FEES	3,613	3,613		

TY 2015 Taxes Schedule

Name: SANFORD P & IRENE F BURNSTEIN FOUNDATION
SANFORD P BURNSTEIN TRUSTEE

EIN: 73-6247047

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL INCOME TAX	10,100			
FOREIGN TAXES	1,361	1,361		

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 SANFORD P & IRENE F BURNSTEIN FOUNDATION SANFORD P BURNSTEIN TRUSTEE	Employer identification number 73-6247047
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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 SANFORD P & IRENE F BURNSTEIN FOUNDATION SANFORD P BURNSTEIN TRUSTEE	Employer identification number 73-6247047
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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	SANFORD P BURNSTEIN	\$ 2,420,046	Person ☐
	5050 NORTH OCEAN DRIVE UNIT 1101		Payroll ☐
	SINGER ISLAND, FL 33404		Noncash ☒ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)

Name of organization SANFORD P & IRENE F BURNSTEIN FOUNDATION SANFORD P BURNSTEIN TRUSTEE	Employer identification number 73-6247047
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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	PUBLICLY TRADED SECURITIES	\$ 1,000,000	2015-11-20
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	PUBLICLY TRADED SECURITIES	\$ 3,015,533	2015-12-02
(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 SANFORD P & IRENE F BURNSTEIN FOUNDATION SANFORD P BURNSTEIN TRUSTEE	Employer identification number 73-6247047
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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	
	_____	_____	
	_____	_____	
	--	_____	
	_____	_____	



IM S I BURNSTEIN CHAR FDN

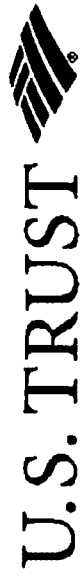
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DESCRIPTION

DESCRIPTION		CUSIP	SYMBOL		Net	Code	Adjustments	Portion Subject to 988 and Market Discount (included in Net G/L)	Portion Subject to 28% Rates (included in Net G/L)
Date sold or disposed	Date acquired	Units	Proceeds	Cost or other basis	Gain/Loss				
COLUMBIA FDS SER TR I STRATEGIC									
		19765L694	LSIZ X						
03/11/15	05/08/13	3888.03	\$22,900.47	\$25,000.00	\$-2,099.53		\$0.00	\$0.00	\$0.00
03/11/15	04/30/13	3906.25	\$23,007.81	\$25,000.00	\$-1,992.19		\$0.00	\$0.00	\$0.00
03/11/15	07/15/13	10929.85	\$64,376.83	\$67,000.00	\$-2,623.17		\$0.00	\$0.00	\$0.00
03/11/15	06/18/13	5322.58	\$31,350.00	\$33,000.00	\$-1,650.00		\$0.00	\$0.00	\$0.00
03/11/15	06/04/13	8000	\$47,120.00	\$50,000.00	\$-2,880.00		\$0.00	\$0.00	\$0.00
03/11/15	06/03/13	7987.22	\$47,044.73	\$50,000.00	\$-2,955.27		\$0.00	\$0.00	\$0.00
03/11/15	03/26/13	6329.11	\$37,278.48	\$40,000.00	\$-2,721.52		\$0.00	\$0.00	\$0.00
03/11/15	04/05/13	6289.31	\$37,044.02	\$40,000.00	\$-2,955.98		\$0.00	\$0.00	\$0.00
03/11/15	04/17/13	3924.65	\$23,116.17	\$25,000.00	\$-1,883.83		\$0.00	\$0.00	\$0.00
03/11/15	04/11/13	3134.8	\$18,463.95	\$20,000.00	\$-1,536.05		\$0.00	\$0.00	\$0.00
03/11/15	05/16/13	3912.36	\$23,043.82	\$25,000.00	\$-1,956.18		\$0.00	\$0.00	\$0.00
03/11/15	05/21/13	7824.73	\$46,087.64	\$50,000.00	\$-3,912.36		\$0.00	\$0.00	\$0.00
FIDELITY ADVISOR FLOATING RATE									
		315807552	FFRI X						
03/11/15	08/29/13	25176.23	\$244,712.99	\$250,000.00	\$-5,287.01		\$0.00	\$0.00	\$0.00
FRANKLIN FTLG RATE DAILY ACCESS									
		353612781	FDAA X						
03/11/15	08/29/13	5116.8	\$46,000.00	\$46,921.02	\$-921.02		\$0.00	\$0.00	\$0.00
08/18/15	08/29/13	16693.46	\$147,403.21	\$153,078.98	\$-5,675.77		\$0.00	\$0.00	\$0.00
ISHARES TR RUSSELL MIDCAP INDEX FD									
		464287499	IWR						
12/07/15	12/03/12	500	\$81,650.90	\$56,186.50	\$25,464.40		\$0.00	\$0.00	\$0.00

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Long Term Transactions

DESCRIPTION	DATE SOLD OR DISPOSED	DATE ACQUIRED	UNITS	CUSIP	SYMBOL	PROCEEDS	COST OR OTHER BASIS	NET GAIN/LOSS	CODE	ADJUSTMENTS	PORTION SUBJECT TO 988 AND MARKET DISCOUNT (INCLUDED IN NET G/L)	PORTION SUBJECT TO 28% RATES (INCLUDED IN NET G/L)
ISHARES TR RUSSELL MIDCAP INDEX FD												
	12/07/15	02/07/11	750	464287499	IWR	\$122,476.34	\$80,300.63	\$42,175.71		\$0.00	\$0.00	\$0.00
ISHARES TR RUSSELL 1000 GROWTH												
	03/11/15	11/20/13	200	464287614	IWF	\$19,588.30	\$16,549.84	\$3,038.46		\$0.00	\$0.00	\$0.00
	03/11/15	12/04/13	600			\$58,764.89	\$49,897.50	\$8,867.39		\$0.00	\$0.00	\$0.00
ISHARES TR RUSSELL 2000 INDEX FD												
	03/11/15	06/18/13	225	464287655	IWM	\$27,087.20	\$22,270.01	\$4,817.19		\$0.00	\$0.00	\$0.00
	03/11/15	05/21/13	350			\$42,135.65	\$34,738.76	\$7,396.89		\$0.00	\$0.00	\$0.00
	12/07/15	02/07/11	2350			\$272,231.44	\$190,689.58	\$81,541.86		\$0.00	\$0.00	\$0.00
	12/07/15	06/27/13	700			\$81,090.22	\$67,972.52	\$13,117.70		\$0.00	\$0.00	\$0.00
	12/07/15	06/03/13	350			\$40,545.11	\$34,326.01	\$6,219.10		\$0.00	\$0.00	\$0.00
	12/07/15	06/04/13	325			\$37,649.03	\$32,111.63	\$5,537.40		\$0.00	\$0.00	\$0.00
	12/07/15	06/18/13	125			\$14,480.40	\$12,372.22	\$2,108.18		\$0.00	\$0.00	\$0.00
IVV ASSET STRATEGY FUND												
	10/22/15	04/17/13	953.47	466001864	IVAE X	\$23,264.69	\$25,000.00	\$-1,735.31		\$0.00	\$0.00	\$0.00
	10/22/15	04/05/13	1504.33			\$36,705.52	\$40,000.00	\$-3,294.48		\$0.00	\$0.00	\$0.00
	10/22/15	04/11/13	733.95			\$17,908.26	\$20,000.00	\$-2,091.74		\$0.00	\$0.00	\$0.00
	10/22/15	03/26/13	1463.59			\$35,711.67	\$40,000.00	\$-4,288.33		\$0.00	\$0.00	\$0.00
	10/22/15	05/08/13	886.53			\$21,631.21	\$25,000.00	\$-3,368.79		\$0.00	\$0.00	\$0.00
	10/22/15	05/16/13	888.73			\$21,685.04	\$25,000.00	\$-3,314.96		\$0.00	\$0.00	\$0.00



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DESCRIPTION	CUSIP	SYMBOL	Date sold or disposed	Date acquired	Units	Proceeds	Cost or other basis	Net Gain/Loss	Code	Adjustments	Portion Subject to 988 and Market Discount (included in Net G/L)	Portion Subject to 28% Rates (included in Net G/L)
IVY ASSET STRATEGY FUND	466001864	IVAE X										
10/22/15	04/30/13	910.75	\$22,222.23			\$25,000.00		\$-2,777.77		\$0.00	\$0.00	\$0.00
SECTOR SPDR TR SHS BEN	81369Y803	XLK										
12/18/15	02/07/11	9850	\$419,607.20			\$265,753.00		\$153,854.20		\$0.00	\$0.00	\$0.00
ETRACS ALERIAN MLP INFRA	902641646	MLPI										
03/30/15	10/25/13	1300	\$49,134.15			\$51,599.47		\$-2,465.32		\$0.00	\$0.00	\$0.00
VANGUARD INDEX FDS REIT VIPER SHS	922908553	VNQ										
03/11/15	04/30/13	150	\$12,145.99			\$10,985.58		\$1,160.41		\$0.00	\$0.00	\$0.00
03/11/15	05/21/13	425	\$34,413.66			\$32,524.01		\$1,889.65		\$0.00	\$0.00	\$0.00
03/11/15	05/16/13	300	\$24,291.99			\$22,745.15		\$1,546.84		\$0.00	\$0.00	\$0.00
03/11/15	05/08/13	350	\$28,340.66			\$26,093.44		\$2,247.22		\$0.00	\$0.00	\$0.00
WISDOMTREE TR EMERGING MARKETS	97717W315	DEM										
03/30/15	10/25/13	750	\$31,765.66			\$40,359.23		\$-8,593.57		\$0.00	\$0.00	\$0.00
WISDOMTREE TR DIEFA HIGH-YIELDING	97717W802	DTH										
03/30/15	05/08/13	1400	\$61,304.87			\$62,629.00		\$-1,324.13		\$0.00	\$0.00	\$0.00
03/30/15	05/16/13	1400	\$61,304.87			\$61,955.04		\$-650.17		\$0.00	\$0.00	\$0.00
03/30/15	04/11/13	1100	\$48,168.11			\$47,074.50		\$1,093.61		\$0.00	\$0.00	\$0.00
03/30/15	03/26/13	2400	\$105,094.06			\$100,494.00		\$4,600.06		\$0.00	\$0.00	\$0.00
03/30/15	04/17/13	30	\$1,313.68			\$1,250.85		\$62.83		\$0.00	\$0.00	\$0.00

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Bank of America Private Wealth Management

IM S J BURNSTEIN CHAR FDN

Long Term Transactions

DESCRIPTION	DATE SOLD OR DISPOSED	DATE ACQUIRED	UNITS	CUSIP	SYMBOL	PROCEEDS	DTH	COST OR OTHER BASIS	NET GAIN/LOSS	CODE	ADJUSTMENTS	PORTION SUBJECT TO 988 AND MARKET DISCOUNT (INCLUDED IN NET G/L)	PORTION SUBJECT TO 28% RATES (INCLUDED IN NET G/L)
WISDOMTREE TR DIEFA HIGH-YIELDING	03/30/15	04/30/13	1400	97717W802		\$61,304.87		\$61,798.10	\$-493.23		\$0.00	\$0.00	\$0.00
Total Long Term Gain/Loss						\$2,773,967.99		\$2,482,676.57	\$291,291.42		\$0.00	\$0.00	\$0.00