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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 separate instructions is at www.irs.gov/form990pf.

2015

Open to Public Inspection

For calendar year 2015 or tax year beginning

, and ending

Name of foundation BERMAN CHARITABLE TRUST		A Employer identification number 94-2940733
Number and street (or P.O. box number if mail is not delivered to street address) 5410 EDSON LANE		B Telephone number 301-816-1555
City or town, state or province, country, and ZIP or foreign postal code ROCKVILLE, MD 20852		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ 18,695,743. (Part I, column (d) must be on cash basis)		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received		520,000.		N/A	
2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities		299,098.	291,263.		STATEMENT 1
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		656,603.			
b Gross sales price for all assets on line 6a 2,079,993.					
7 Capital gain net income (from Part IV, line 2)			656,603.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less: Cost of goods sold					
c Gross profit or (loss)					
11 Other income		2,538,863.	2,538,863.		STATEMENT 2
12 Total. Add lines 1 through 11		4,014,564.	3,486,729.		
13 Compensation of officers, directors, trustees, etc.		0.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees STMT 3		16,596.	16,595.		0.
b Accounting fees STMT 4		18,216.	18,216.		0.
c Other professional fees					
17 Interest					
18 Taxes STMT 5		143.	143.		0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 6		5,791.	5,791.		0.
24 Total operating and administrative expenses. Add lines 13 through 23		40,746.	40,745.		0.
25 Contributions, gifts, grants paid		1,330,832.			1,330,832.
26 Total expenses and disbursements. Add lines 24 and 25		1,371,578.	40,745.		1,330,832.
27 Subtract line 26 from line 12					
a Excess of revenue over expenses and disbursements		2,642,986.			
b Net investment income (if negative, enter -0-)			3,445,984.		
c Adjusted net income (if negative, enter -0-)				N/A	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value		
Assets	1	Cash - non-interest-bearing		246,743.	82,596.	82,596.
	2	Savings and temporary cash investments		1,575,484.	1,694,587.	1,694,587.
	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				
	7	Other notes and loans receivable ▶				
		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 STMT 8	807,140.	166,450.	189,290.	
	b	Investments - corporate stock STMT 9	1,897,852.	3,117,665.	3,866,825.	
	c	Investments - corporate bonds				
	Liabilities	11	Investments - land, buildings and equipment basis ▶			
		Less accumulated depreciation ▶				
12		Investments - mortgage loans				
13		Investments - other STMT 10	4,243,992.	6,847,014.	12,862,445.	
14		Land, buildings, and equipment basis ▶				
		Less accumulated depreciation ▶				
15		Other assets (describe ▶)				
16		Total assets (to be completed by all filers - see the instructions Also, see page 1, item I)	8,771,211.	11,908,312.	18,695,743.	
17		Accounts payable and accrued expenses	8,665.	14,561.		
18		Grants payable				
Net Assets or Fund Balances	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable				
	22	Other liabilities (describe ▶ STATEMENT 11)	633,318.	376,215.		
	23	Total liabilities (add lines 17 through 22)	641,983.	390,776.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>					
	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 ▶ <input checked="" type="checkbox"/>					
	and complete lines 27 through 31					
	27	Capital stock, trust principal, or current funds	0.	0.		
28	Paid-in or capital surplus, or land, bldg, and equipment fund	0.	0.			
29	Retained earnings, accumulated income, endowment, or other funds	8,129,228.	11,517,536.			
30	Total net assets or fund balances	8,129,228.	11,517,536.			
31	Total liabilities and net assets/fund balances	8,771,211.	11,908,312.			

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	8,129,228.
2	Enter amount from Part I, line 27a	2	2,642,986.
3	Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 7	3	749,897.
4	Add lines 1, 2, and 3	4	11,522,111.
5	Decreases not included in line 2 (itemize) ▶ NON-DEDUCTIBLE EXPENSES	5	4,575.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	11,517,536.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 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.)
1a				
b SEE ATTACHED STATEMENT				
c				
d				
e				

(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)
a			
b			
c			
d			
e 2,079,993.		1,423,390.	656,603.

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b			
c			
d			
e			656,603.

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	656,603.
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) If (loss), enter -0- in Part I, line 8	{ }	3	N/A

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 the 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	1,914,786.	12,960,098.	.147745
2013	1,251,734.	13,658,426.	.091646
2012	1,018,400.	15,013,155.	.067834
2011	459,510.	14,761,166.	.031130
2010	3,148,343.	16,593,045.	.189739

2 Total of line 1, column (d)	2	.528094
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	.105619
4 Enter the net value of noncharitable-use assets for 2015 from Part X, line 5	4	18,167,947.
5 Multiply line 4 by line 3	5	1,918,880.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	34,460.
7 Add lines 5 and 6	7	1,953,340.
8 Enter qualifying distributions from Part XII, line 4	8	1,330,832.

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 instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> 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 <input type="checkbox"/> and enter 1% of Part I, line 27b	1	68,920.
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0.
3	Add lines 1 and 2	3	68,920.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0.
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	68,920.
6	Credits/Payments		
a	2015 estimated tax payments and 2014 overpayment credited to 2015	6a	7,800.
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	7,800.
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	1,391.
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed SEE STATEMENT 12	9	62,511.
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	
11	Enter the amount of line 10 to be Credited to 2016 estimated tax 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?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ 0. (2) On foundation managers \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
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?	X	
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	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) MD		
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	X	
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		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses STMT 13	X	

Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11	X
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	X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address N/A	13	X
14 The books are in care of DENNIS BERMAN Telephone no 301-816-1555 Located at 5410 EDSON LANE #220, ROCKVILLE, MD ZIP+4 20852		
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	N/A
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 the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country	16	X

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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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	N/A	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 X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
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? If "Yes," list the years	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
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)	N/A	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		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 2015 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015)		3b X
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a X
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 X

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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)?

N/A

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?

N/A

☐ 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

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?

N/A

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.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
DENNIS BERMAN	TRUSTEE			
5410 EDSON LANE, SUITE 220				
ROCKVILLE, MD 20852	2.00	0.	0.	0.
VICKI BERMAN	TRUSTEE			
6319 TILDEN LANE				
ROCKVILLE, MD 20852	2.00	0.	0.	0.
ELYSE VINITSKY	TRUSTEE			
4801 HAMPDEN LANE #501				
BETHESDA, MD 20814	2.00	0.	0.	0.
STEPHEN L. BERMAN	TRUSTEE			
1735 GILLESPIE STREET				
SANTA BARBARA, CA 93101	2.00	0.	0.	0.

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

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

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

0

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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	4,091,907.
b	Average of monthly cash balances	1b	1,570,923.
c	Fair market value of all other assets	1c	12,781,786.
d	Total (add lines 1a, b, and c)	1d	18,444,616.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	18,444,616.
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	276,669.
5	Net value of noncharitable-use assets Subtract line 4 from line 3 Enter here and on Part V, line 4	5	18,167,947.
6	Minimum investment return. Enter 5% of line 5	6	908,397.

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	908,397.
2a	Tax on investment income for 2015 from Part VI, line 5	2a	68,920.
b	Income tax for 2015 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	68,920.
3	Distributable amount before adjustments Subtract line 2c from line 1	3	839,477.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	839,477.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	839,477.

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	1,330,832.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	1,330,832.
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	5	0.
6	Adjusted qualifying distributions Subtract line 5 from line 4	6	1,330,832.

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				839,477.
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only			0.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2015				
a From 2010	2,325,463.			
b From 2011	423,705.			
c From 2012	270,196.			
d From 2013	568,813.			
e From 2014	1,266,781.			
f Total of lines 3a through e	4,854,958.			
4 Qualifying distributions for 2015 from Part XII, line 4 ▶ \$ 1,330,832.				
a Applied to 2014, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions) **	420,000.			
d Applied to 2015 distributable amount				839,477.
e Remaining amount distributed out of corpus	71,355.			
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.	5,346,313.			
a Corpus Add lines 3f, 4c, and 4e. Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount - see instructions		0.		
e Undistributed income for 2014 Subtract line 4a from line 2a Taxable amount - see instr			0.	
f Undistributed income for 2015 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2016				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2010 not applied on line 5 or line 7	2,325,463.			
9 Excess distributions carryover to 2016 Subtract lines 7 and 8 from line 6a	3,020,850.			
10 Analysis of line 9				
a Excess from 2011	423,705.			
b Excess from 2012	270,196.			
c Excess from 2013	568,813.			
d Excess from 2014	1,266,781.			
e Excess from 2015	491,355.			

Part XV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
AGUDAS ISRAEL BALTIMORE 6902 DORSET ROAD BALTIMORE, MD 21215	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
AGUDAS TOV V'CHESED 46 MAIN ST #379 MONSEY, NY 10952	NONE	OTHER PUBLIC CHARITY	CHARITABLE	200.
AISH HATORAH ISRAEL 1 WESTERN WALL PLAZA, POB 14149 JERUSALEM, ISRAEL 91141	NONE	OTHER PUBLIC CHARITY	CHARITABLE	1,500.
AISH INTERNATIONAL 505 8TH AVENUE, SUITE 601 NEW YORK, NY 10018	NONE	OTHER PUBLIC CHARITY	CHARITABLE	150,000.
ALEF BET MONTESSORI 5701 GROSVENOR LN BETHESDA, MD 20814	NONE	OTHER PUBLIC CHARITY	CHARITABLE	1,000.
Total	SEE CONTINUATION SHEET(S)			3a 1,330,832.
b Approved for future payment				
NONE				
Total				3b 0.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 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.)
1a	50,505.051 SHS HARTFORD SHORT DURATION FUND A	P	05/07/15	05/31/15
b	20,680.147 SHS JPMORGAN SHORT DURATION BOND A	P	06/16/15	06/22/15
c	8,040.000 SHS FEDERAL REALTY INVT TRUST	P	09/18/08	12/31/15
d	65,000.000 SHS PUERTO RICO COMWLTH HWY SER	P	09/18/08	05/12/15
e	PRUDENT CAPITAL II LP	P		
f	TZG-SACHS CALL CENTER LLC	P		
g	CAPITAL GAINS DIVIDENDS			
h				
i				
j				
k				
l				
m				
n				
o				

(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)
a 500,000.		495,000.	5,000.
b 225,000.		223,530.	1,470.
c 1,123,722.		643,827.	479,895.
d 62,882.		61,033.	1,849.
e 2,055.			2,055.
f 131,387.			131,387.
g 34,947.			34,947.
h			
i			
j			
k			
l			
m			
n			
o			

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a			5,000.
b			1,470.
c			479,895.
d			1,849.
e			2,055.
f			131,387.
g			34,947.
h			
i			
j			
k			
l			
m			
n			
o			

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	656,603.
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) If (loss), enter "-0-" in Part I, line 8 }	3	N/A

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
ALLEGHENY MOUNTAIN INSTITUTE PO BOX 542 STAUNTON, VA 24402	NONE	OTHER PUBLIC CHARITY	CHARITABLE	300,000.
ALZHEIMER'S ASSOCIATION 225 N MICHIGAN AVE, FL 17 CHICAGO, IL 60601	NONE	OTHER PUBLIC CHARITY	CHARITABLE	5,000.
AMERICAN ASSOCIATION FOR BIKUR CHOLIM HOSPITAL 35 W 31ST, ROOM 1003 NEW YORK, NY 10117	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
AMERICAN COMMITTEE FOR SHAARE ZEDEK 55 WEST 39TH ST, 4TH FLOOR JERUSALEM, ISRAEL	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
AMERICAN COMMITTEE FOR THE WEIZMANN INSTITUTE OF SCIENCE PO BOX 19002 NEW YORK, NY 10277	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
AMERICAN FRIENDS OF ALYN HOSPITAL 51 E 42ND ST #308 NEW YORK, NY 10017	NONE	OTHER PUBLIC CHARITY	CHARITABLE	4,000.
AMERICAN FRIENDS OF EFRAT CRIB 333 W 86TH ST #1003 NEW YORK, NY 10024	NONE	OTHER PUBLIC CHARITY	CHARITABLE	1,000.
AMERICAN FRIENDS OF HATZOLAH DAROM 1271 45TH ST BROOKLYN, NY 11219	NONE	OTHER PUBLIC CHARITY	CHARITABLE	1,500.
AMERICAN FRIENDS OF HEBRON YESHIVA IN JERUSALEM 1220 BROADWAY, ROOM 406 NEW YORK, NY 10117	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
AMERICAN FRIENDS OF HERITAGE HOUSE 14 UXBRIDGE ST STATEN ISLAND, NY 10314	NONE	OTHER PUBLIC CHARITY	CHARITABLE	1,000.
Total from continuation sheets				1,178,032.

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
AMERICAN FRIENDS OF KUPAT HA'IR 4115 14TH AVE BROOKLYN, NY 11219	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
AMERICAN FRIENDS OF MAGEN DAVID ADOM 352 SEVENTH AVENUE #400 NEW YORK, NY 10001	NONE	OTHER PUBLIC CHARITY	CHARITABLE	1,000.
AMERICAN FRIENDS OF MICHKANE MEIR 86 OCEANSIDE AVE STATEN ISLAND, NY 10305	NONE	OTHER PUBLIC CHARITY	CHARITABLE	50.
AMERICAN FRIENDS OF SHALVA 315 FIFTH AVENUE, 6TH FLOOR NEW YORK, NY 10016	NONE	OTHER PUBLIC CHARITY	CHARITABLE	5,000.
AMERICAN FRIENDS OF SULAM 241 VIOLA RD MONSEY, NY 10952	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
AMERICAN FRIENDS OF TZOHAR 1274 49TH ST BROOKLYN, NY 11219	NONE	OTHER PUBLIC CHARITY	CHARITABLE	200.
AMERICAN FRIENDS OF YESHIVA MEAH SHEARIM 136-84 71ST RD KEW GARDENS HILLS, NY 11367	NONE	OTHER PUBLIC CHARITY	CHARITABLE	2,500.
AMERICAN FRIENDS OF YESHIVAT BIRKAT MOSHE 76-16 171ST ST FLUSHING, NY 11366	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
AMERICAN FRIENDS OF YESHIVAT KEREN B'YAVNEH 1418 AVENUE N #1 BROOKLYN, NY 11230	NONE	OTHER PUBLIC CHARITY	CHARITABLE	5,000.
AMERICAN FRIENDS OF YESHIVOT BNEI AKIVA 11 BROADWAY #901 NEW YORK, NY 10004	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
AMERICAN MIRLAT COMMITTEE 1700 BROADWAY, SUITE 2000 NEW YORK, NY 10019	NONE	OTHER PUBLIC CHARITY	CHARITABLE	250.
AMERICAN SOCIETY FOR YAD VASHEN INC PO BOX 170305 MILWAUKEE, WI 53217	NONE	OTHER PUBLIC CHARITY	CHARITABLE	200.
AMERICAN TECHNION SOCIETY ISRAEL INSTITUTE OF TECHNOLOGY 55 E 59 ST FL 14 NEW YORK, NY 10126	NONE	OTHER PUBLIC CHARITY	CHARITABLE	250.
AMIT PO BOX 30516 LANSING, MI 48909	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
ANEINU WIDOWS AND ORPHANS FUND 637 6TH ST LAKEWOOD, NJ 08701	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
ANTI-DEFAMATION LEAGUE 10495 SANTA MONICA BLVD LOS ANGELES, CA 90025	NONE	OTHER PUBLIC CHARITY	CHARITABLE	20,000.
ASCENT OF SAFED 408 PARK AVENUE WOODBURY, NY 11797	NONE	OTHER PUBLIC CHARITY	CHARITABLE	180.
BET ELEZRACHI 7 PENN PLAZA NEW YORK, NY 10001	NONE	OTHER PUBLIC CHARITY	CHARITABLE	3,000.
BETH SHOLOM CONGREGATION 11825 SEVEN LOCKS ROAD POTOMAC, MD 20854	NONE	OTHER PUBLIC CHARITY	CHARITABLE	3,508.
BETH TOMCHE TORAH V'ZIKNE YISROEL 25 BIALYSTOKER PL NEW YORK, NY 10002	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
BIKUR CHOLIM OF GREATER WASHINGTON PO BOX 707 SILVER SPRING, MD 20918	NONE	OTHER PUBLIC CHARITY	CHARITABLE	5,000.
BIKUR CHOLIM 1450 WALDEN AVE LAKEWOOD, NJ 08071	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
BOYS TOWN JERUSALEM FOUNDATION OF AMERICA 1 PENN PLZ #6250 NEW YORK, NY 10117	NONE	OTHER PUBLIC CHARITY	CHARITABLE	250.
CABIN JOHN PARK VOLUNTEER FIRE DEPARTMENT 8001 RIVER ROAD BETHESDA, MD 20817	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
CARMEI HA'IR 1565 E 9TH ST BROOKLYN, NY 11230	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
CENTRAL FUND FOR ISRAEL 980 SIXTH AVE 3RD FL NEW YORK, NY 10018	NONE	OTHER PUBLIC CHARITY	CHARITABLE	2,680.
CHABAD BAIS MENACHEM JEWISH CENTER 7403 HOPKINS AVENUE COLLEGE PARK, MD 20740	NONE	OTHER PUBLIC CHARITY	CHARITABLE	5,000.
CHABAD OF THE BAHAMAS 1483 CARROLL ST BROOKLYN, NY 11213	NONE	OTHER PUBLIC CHARITY	CHARITABLE	500.
CHABAD SHUL OF POTOMAC 11826 SEVEN LOCKS ROAD POTOMAC, MD 20854	NONE	OTHER PUBLIC CHARITY	CHARITABLE	60,717.
CHABAD TERROR VICTIMS PROJECT 201 E 42ND ST #3210 NEW YORK, NY 10164	NONE	OTHER PUBLIC CHARITY	CHARITABLE	250.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
CHAI LIFE LINE 7732 FONTAINE ST POTOMAC, MD 20854	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
CHAI4EVER 1221 MADISON AVE LAKEWOOD, NJ 08701	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
CHAMAH 27 WILLIAM ST #613 NEW YORK, NY 10005	NONE	OTHER PUBLIC CHARITY	CHARITABLE	50.
CHANUN V' RACHUM 655 EIGHTH ST LAKEWOOD, NJ 08701	NONE	OTHER PUBLIC CHARITY	CHARITABLE	250.
CHARGE SYNDROME FOUNDATION INC 141 MIDDLE NECK RD SANDS POINT, NY 11050	NONE	OTHER PUBLIC CHARITY	CHARITABLE	5,000.
CHESED 24/7 286 N MAIN ST #210 SPRING VALLEY, NY 10977	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
CHEVRA SIMCHAS SHABBOS V'YOM TOV 593 MONTGOMERY ST BROOKLYN, NY 11225	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
CHMOL PO BOX 191214 BROOKLYN, NY 11219	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
CHOFETZ CHAIM HERITAGE FOUNDATION 361 SPOOK ROCK ROAD SUFFERN, NY 10901	NONE	OTHER PUBLIC CHARITY	CHARITABLE	350.
COLEL CHABAD 806 EASTERN PARKWAY BROOKLYN, NY 11213	NONE	OTHER PUBLIC CHARITY	CHARITABLE	5,000.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
COMMITTEE FOR ACCURACY IN MIDDLE EAST REPORTING IN AMERICA PO BOX 35040 BOSTON, MA 02135	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
CONCERNED FRIENDS OF YESHIVA DERECH CHAIM 2601 AVENUE K BROOKLYN, NY 11210	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
CONGREGATION BETH ARON 1181 EAST 9TH ST BROOKLYN, NY 11230	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
CONGREGATION CHEVRA ONEG SHABBOS 119 WEST 72ND ST #155 NEW YORK, NY 10023	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
CONGREGATION MOSDOS TOLDOS AHARON 199 LEE AVE #710 BROOKLYN, NY 11211	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
CONGREGATION ZICHRON ARYEH 5704 14TH AVE BROOKLYN, NY 11219	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
COUNT ME IN 788 EAST 4TH ST BROOKLYN, NY 11218	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
EDUCATIONAL INSTITUTE OHOLEI TORAH 667 EASTERN PARKWAY BROOKLYN, NY 11213	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
EIZER L'CHOLIM IL'YOLODOS 1802 50TH ST BROOKLYN, NY 11204	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
EMUNAH OF AMERICA 7 PENN PLAZA NEW YORK, NY 10001	NONE	OTHER PUBLIC CHARITY	CHARITABLE	250.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
EZER MIZION 1281 49TH ST BROOKLYN, NY 11219	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
EZRAS YISROEL RESCUE FUND 521 5TH ST LAKEWOOD, NJ 08701	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
EZRAS YISROEL 4415 14TH AVE BROOKLYN, NY 11219	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
EZRAT ARGENTINA PO BOX 640 HARRIMAN, NY 10926	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
FEDERATION OF JEWISH COMMUNITIES OF THE CIS 410 PARK AVE #1500 NEW YORK, NY 10126	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
FEED ISRAEL PO BOX 191210 BROOKLYN, NY 11219	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
FJC 520 EIGHTH AVE 20TH FL NEW YORK, NY 10018	NONE	OTHER PUBLIC CHARITY	CHARITABLE	250.
FRIENDS OF B'AHAVAT YISRAEL 4809 AVENUE N, PMB #284 BROOKLYN, NY 11234	NONE	OTHER PUBLIC CHARITY	CHARITABLE	250.
FRIENDS OF BIKUR CHOLIM EZRAT ACHIM 5014 16TH AVE #283 BROOKLYN, NY 11204	NONE	OTHER PUBLIC CHARITY	CHARITABLE	180.
FRIENDS OF ISRAEL DISABLED VETERANS INC PO BOX 1548 NEW YORK, NY 10277	NONE	OTHER PUBLIC CHARITY	CHARITABLE	250.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
FRIENDS OF UNITED HATZALAH 208 EAST 51ST ST #304 NEW YORK, NY 10022	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
FRIENDS OF YAD SARAH 450 PARK AVE 7TH FL NEW YORK, NY 10022	NONE	OTHER PUBLIC CHARITY	CHARITABLE	200.
FRIENDS OF YESHIVAT MERCAS HARAV 870 E 27TH ST BROOKLYN, NY 11210	NONE	OTHER PUBLIC CHARITY	CHARITABLE	5,000.
FRIENDSHIP CIRCLE 10321 CROWN POINT CT POTOMAC, MD 20854	NONE	OTHER PUBLIC CHARITY	CHARITABLE	3,806.
GARDENS JEWISH EXPERIENCE 180 BENT TREE DRIVE PALM BEACH GARDENS, FL 33418	NONE	OTHER PUBLIC CHARITY	CHARITABLE	10,000.
GC KEREN YESOMIN 14 ESTATE DR FALLSBURG, NY 12733	NONE	OTHER PUBLIC CHARITY	CHARITABLE	250.
GEMACH MOSHE AHARON 1320 48TH ST BROOKLYN, NY 11219	NONE	OTHER PUBLIC CHARITY	CHARITABLE	250.
GIRLS TOWN 1274 49TH ST BROOKLYN, NY 11219	NONE	OTHER PUBLIC CHARITY	CHARITABLE	350.
GOMLEI CHESED 77 DECATUR AVE SPRING VALLEY, NY 10977	NONE	OTHER PUBLIC CHARITY	CHARITABLE	200.
GREAT FREE KITCHEN IN JERUSALEM PO BOX 151 NEW YORK, NY 10272	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
GREATER WASHINGTON COMMUNITY KOLLEL 10900 LOCKWOOD DRIVE SILVER SPRING, MD 20901	NONE	OTHER PUBLIC CHARITY	CHARITABLE	2,500.
GUSH ETZION FOUNDATION PO BOX 1030 MANCHESTER, NH 03105	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
HEALS 1318 CONEY ISLAND AVE #14 BROOKLYN, NY 11230	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
HEARTSTRINGS RACHASHEI LEV PO BOX 1717 BRICK, NJ 08723	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
HEBREW SHELTERING SOCIETY 1401 ARCOLA AVE SILVER SPRING, MD 20902	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
HEICHAL HATORAH 300 E 77TH ST #2A NEW YORK, NY 10075	NONE	OTHER PUBLIC CHARITY	CHARITABLE	750.
HONEST REPORTING 10024 SKOKIE BLVD. SUITE 201 SKOKIE, IL 60077	NONE	OTHER PUBLIC CHARITY	CHARITABLE	1,500.
IGUD YEHUDAI ZHITOMIR 10 EMES LN MONSEY, NY 10952	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
INSTITUTE FOR DAYANIM 21751 W 11 MILE RD SOUTHFIELD, MI 48076	NONE	OTHER PUBLIC CHARITY	CHARITABLE	4,000.
ISRAEL CANCER RESEARCH FUND PO BOX 8266 TOPEKA, KS 66608	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
ISRAEL CHILDRENS CANCER FOUNDATION 141 WASHINGTON AVE #205 LAWRENCE, NY 11559	NONE	OTHER PUBLIC CHARITY	CHARITABLE	200.
ISRAEL SPECIAL KIDS FUND 505 EIGHTH AVE #12A04 NEW YORK, NY 10138	NONE	OTHER PUBLIC CHARITY	CHARITABLE	200.
ITKA LERNER BIKUR CHOLIM PO BOX 180477 BROOKLYN, NY 11218	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
JBI INTERNATIONAL 110 E 30TH ST NEW YORK, NY 10016	NONE	OTHER PUBLIC CHARITY	CHARITABLE	200.
JCADA PO BOX 2266 ROCKVILLE, MD 20847	NONE	OTHER PUBLIC CHARITY	CHARITABLE	2,000.
JERUSALEM OPEN HOUSE 3014 AVENUE L BROOKLYN, NY 11210	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
JEWISH CARING NETWORK 122 SLADE AVE #100-A BALTIMORE, MD 21208	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
JEWISH ROC 11304 OLD GEORGETOWN RD ROCKVILLE, MD 20852	NONE	OTHER PUBLIC CHARITY	CHARITABLE	1,000.
JEWISH WOMENS' RENAISSANCE PROJECT 12230 WILKINS AVE ROCKVILLE, MD 20852	NONE	OTHER PUBLIC CHARITY	CHARITABLE	1,000.
KAREN ELUZAR 171 DIVISION AVE BROOKLYN, NY 11211	NONE	OTHER PUBLIC CHARITY	CHARITABLE	200.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
KENESETH BETH ISRAEL - JWRP 6300 PATTERSON AVE RICHMOND, VA 23226	NONE	OTHER PUBLIC CHARITY	CHARITABLE	250.
KEREN ANIYEM PO BOX 300443 BROOKLYN, NY 11230	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
KEREN CHAYA SARA 24 HOMESTEAD LN MONSEY, NY 10952	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
KEREN ORAH 9A JOSHUA CT MONSEY, NY 10952	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
KEREN YESOMIM 10 EMES LN MONSEY, NY 10952	NONE	OTHER PUBLIC CHARITY	CHARITABLE	250.
KIMPATORIN AID 1324 50TH ST BROOKLYN, NY 11219	NONE	OTHER PUBLIC CHARITY	CHARITABLE	200.
KOLEL MAREH EFRAIM 1264 56TH ST BROOKLYN, NY 11219	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
L'MAN ACHAI SCHOLARSHIP FUND 4405 13TH AVE BROOKLYN, NY 11219	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
LECHEM LAR'EVIM 5316 15TH AVE BROOKLYN, NY 11219	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
LEKOVOD SHABBOS 323 AVENUE F BROOKLYN, NY 11218	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
LEV MALKA PO BOX 23907, RAMOT 1 JERUSALEM, ISRAEL 91239	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
LEV NODIV 521 5TH ST LAKEWOOD, NJ 08701	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
LUBAVITCHER YESHIVA 1455 CARROLL ST BROOKLYN, NY 11213	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
MEIR PANIM 5316 NEW UTRECHT AVE BROOKLYN, NY 11219	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
MELVIN J. BERMAN HEBREW ACADEMY 13300 ARCTIC AVE ROCKVILLE, MD 20853	NONE	OTHER PUBLIC CHARITY	CHARITABLE	178,804.
MEMRI PO BOX 27837 WASHINGTON, DC 20077	NONE	OTHER PUBLIC CHARITY	CHARITABLE	2,500.
MEOR UMD 4607 KNOX RD COLLEGE PARK, MD 20740	NONE	OTHER PUBLIC CHARITY	CHARITABLE	4,500.
MESAMCHE LEV 1364 53RD ST BROOKLYN, NY 11219	NONE	OTHER PUBLIC CHARITY	CHARITABLE	200.
MESIVTA NEIMUS HATORAH 6104 PARK HEIGHTS AVE BALTIMORE, MD 21215	NONE	OTHER PUBLIC CHARITY	CHARITABLE	2,500.
MESIVTA TIFERETH ISRAEL OF RIZHIN 247 EAST BROADWAY NEW YORK, NY 10002	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
MICKVAH ATERES YISRAEL 11729 GAINSBOROUGH RD POTOMAC, MD 20854	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100,000.
MIFAL HASHAS PO BOX 190725 BROOKLYN, NY 11219	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
MIFAL 536 E 5TH ST BROOKLYN, NY 11218	NONE	OTHER PUBLIC CHARITY	CHARITABLE	350.
MIRVAH USA 1451-52 ST #A-1 BROOKLYN, NY 11219	NONE	OTHER PUBLIC CHARITY	CHARITABLE	250.
MISHON MENACHEM 1552 45TH ST BROOKLYN, NY 11219	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
MIVTOCH OZ 302 AVENUE F BROOKLYN, NY 11218	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
MOISDOS SANZ-STROPKOV 7 WEBSTER AVE BROOKLYN, NY 11230	NONE	OTHER PUBLIC CHARITY	CHARITABLE	250.
MOSDOS B'YAD YEMIN 1235 47TH ST BROOKLYN, NY 11219	NONE	OTHER PUBLIC CHARITY	CHARITABLE	200.
MOSDOS KEVER RACHEL 1303 53RD ST #45 BROOKLYN, NY 11219	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
NCSY - ATLANTIC SEABOARD 4001 CLARKS LANE BALTIMORE, MD 21215	NONE	OTHER PUBLIC CHARITY	CHARITABLE	27,500.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
NER ISRAEL 400 MT WILSON LANE BALTIMORE, MD 21208	NONE	OTHER PUBLIC CHARITY	CHARITABLE	5,000.
NEVE YERUSHALAYIM INC 25 BROADWAY #403 NEW YORK, NY 10004	NONE	OTHER PUBLIC CHARITY	CHARITABLE	250.
NOAM SHABBOS 1704 45TH ST BROOKLYN, NY 11204	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
NOSAI B'OAL FUND 975 FOREST AVE #1A LAKEWOOD, NJ 08701	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
NOTZER CHESED 1108 54TH ST BROOKLYN, NY 11219	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
OD YOSEF CHAI 18 NEW COUNTY RD MONSEY, NY 10952	NONE	OTHER PUBLIC CHARITY	CHARITABLE	1,100.
OHEL CHILDREN'S HOME & FAMILY SERVICES 4510 16TH AVE BROOKLYN, NY 11204	NONE	OTHER PUBLIC CHARITY	CHARITABLE	200.
OHR HATORAH RECHOV BUCHSBOIM 17/1 RAMAT SHLOMO, JERUSALEM, ISRAEL	NONE	OTHER PUBLIC CHARITY	CHARITABLE	250.
ONE FAMILY PO BOX 822732 PHILADELPHIA, PA 19182	NONE	OTHER PUBLIC CHARITY	CHARITABLE	350.
ORTHODOX UNION 11 BROADWAY 14TH FL NEW YORK, NY 10004	NONE	OTHER PUBLIC CHARITY	CHARITABLE	5,000.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
OTSAR FAMILY SERVICES 2334 WEST 13TH ST BROOKLYN, NY 11223	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
OU ISRAEL FREE SPIRIT 549 CENTRAL AVE #B CEDARHURST, NY 11516	NONE	OTHER PUBLIC CHARITY	CHARITABLE	180.
OZER DALIM 1301 AVENUE K BROOKLYN, NY 11230	NONE	OTHER PUBLIC CHARITY	CHARITABLE	200.
PEF ISRAEL ENDOWMENT FUNDS INC 317 MADISON AVE #607 NEW YORK, NY 10017	NONE	OTHER PUBLIC CHARITY	CHARITABLE	1,500.
PROJECT EXTREME 335 CENTRAL AVE LAWRENCE, NY 11559	NONE	OTHER PUBLIC CHARITY	CHARITABLE	1,000.
PUAH 1709 KINGS HWY BROOKLYN, NY 11229	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
RABBI AARON SCHECHTER 1248 EAST 12TH ST BROOKLYN, NY 11230	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
RABBI AVRAHAM YESHAIA KARELITZ 8 MAPLE TERRACE MONSEY, NY 10952	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
RABBI MEIR BAAL HANEIS SALANT PO BOX 260 LAKEWOOD, NJ 08701	NONE	OTHER PUBLIC CHARITY	CHARITABLE	250.
REB MEIR BAAL HANES KOLEL SHOMREI HACHOMOS 18 HEYWARD ST BROOKLYN, NY 11249	NONE	OTHER PUBLIC CHARITY	CHARITABLE	250.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
REGIONAL BIKUR CHOLIM PO BOX 1294 MONSEY, NY 10952	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
SEGULAH 1276 46TH ST #206 BROOKLYN, NY 11219	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
SHILOH PO BOX 212 SUFFERN, NY 10901	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
SHIMON I FRUMA SENDER 46 MAIN ST #379 MONSEY, NY 10952	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
SHORESH 3723 OLD COURT RD #206 BALTIMORE, MD 21208	NONE	OTHER PUBLIC CHARITY	CHARITABLE	4,000.
SIMCHAS YOM TOV 1879-48TH ST BROOKLYN, NY 11204	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
SOUTHEAST HEBREW CONGREGATION 10900 LOCKWOOD AVE SILVER SPRING, MD 20901	NONE	OTHER PUBLIC CHARITY	CHARITABLE	3,000.
STAM GEMILAS CHESED HACHZOKAS MISHPACHA FUND 604 SIXTH ST LAKEWOOD, NJ 08701	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
STAND WITH US PO BOX 341069 LOS ANGELES, CA 90034	NONE	OTHER PUBLIC CHARITY	CHARITABLE	250.
SULAM 13300 ARCTIC AVE ROCKVILLE, MD 20853	NONE	OTHER PUBLIC CHARITY	CHARITABLE	15,000.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
SUNFLOWER BAKERY 8507 ZIGGY LN GAITHERSBURG, MD 20877	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
SUPPORTERS OF TORAH 318 NINTH ST #5 LAKEWOOD, NJ 08701	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
TELSHE YESHIVA 28400 EUCLID AVE WICKLIFFE, OH 44092	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
THE ENDOWMENT FOR MIDDLE EAST TRUTH PO BOX 66366 WASHINGTON, DC 20035	NONE	OTHER PUBLIC CHARITY	CHARITABLE	2,000.
THE ETZION FOUNDATION 111 GALWAY PL #203 TEANECK, NJ 07666	NONE	OTHER PUBLIC CHARITY	CHARITABLE	5,100.
THE GESHER FOUNDATION USA 322 BLEECKER ST #444 NEW YORK, NY 10014	NONE	OTHER PUBLIC CHARITY	CHARITABLE	250.
THE HEBREW ACADEMY 1975 LYNDWAY RD CLEVELAND, OH 44121	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
THE HIGHLAND CENTER PO BOX 556 MONTEREY, VA 24465	NONE	OTHER PUBLIC CHARITY	CHARITABLE	15,000.
THE ISRAEL YOUTH VILLAGE 770 EASTERN PARKWAY BROOKLYN, NY 11213	NONE	OTHER PUBLIC CHARITY	CHARITABLE	250.
THE JEWISH FOUNDATION FOR THE RIGHTEOUS 305 7TH AVE, ROOM 1900 NEW YORK, NY 10001	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
THE JEWISH GUILD FOR THE BLIND PO BOX 569 ETNAM, NH 03750	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
THE LONE SOLDIER CENTER PO BOX 10724, FORT DEARBORN CHICAGO, IL 60610	NONE	OTHER PUBLIC CHARITY	CHARITABLE	4,500.
TIKVAH LAYELED 322 WEST 52ND ST NEW YORK, NY 10101	NONE	OTHER PUBLIC CHARITY	CHARITABLE	200.
TIME 1310 48TH ST #406 BROOKLYN, NY 11219	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
TORAH INSTITUTE 35 ROSEWOOD LANE OWINGS MILLS, MD 21117	NONE	OTHER PUBLIC CHARITY	CHARITABLE	1,000.
TORAH SCHOOL OF GREATER WASHINGTON 2010 LINDEN LANE SILVER SPRING, MD 20910	NONE	OTHER PUBLIC CHARITY	CHARITABLE	65,000.
TORAT ISRAEL 402 OCEAN PARKWAY #402 BROOKLYN, NY 11218	NONE	OTHER PUBLIC CHARITY	CHARITABLE	25.
TZEDAKA V'CHESSED RECHOV AKIVA 12 MODIIN ELITE, ISRAEL	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
TZIDKAS YOSEF NAFTULI 1106 N BELGRADE RD SILVER SPRING, MD 20902	NONE	OTHER PUBLIC CHARITY	CHARITABLE	200.
TZIDKATH YOSEPH NAPHTALI 5121 17TH AVE BROOKLYN, NY 11204	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
UNITED CHARITY INSTITUTIONS OF JERUSALEM 1778 45TH ST BROOKLYN, NY 11204	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
UNITED SOUP KITCHENS 700 BROADWAY NEW YORK, NY 10211	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
UNIVERSITY OF MARYLAND HILLEL 7612 MOWATT LN COLLEGE PARK, MD 20740	NONE	OTHER PUBLIC CHARITY	CHARITABLE	107,500.
UT CHABAD 11729 GAINSBOROUGH RD POTOMAC, MD 20854	NONE	OTHER PUBLIC CHARITY	CHARITABLE	2,500.
VAAD L'HATZOLAS NIDCHEI YISROEL 1566 CONEY ISLAND AVE BROOKLYN, NY 11230	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
YAD ELIEZER 1102 E 26TH ST BROOKLYN, NY 11210	NONE	OTHER PUBLIC CHARITY	CHARITABLE	7,500.
YAD L'KASHISH PO BOX 494 ENGLEWOOD, NJ 07631	NONE	OTHER PUBLIC CHARITY	CHARITABLE	500.
YAD YEHUDA 719 S BELGRADE RD SILVER SPRING, MD 20902	NONE	OTHER PUBLIC CHARITY	CHARITABLE	1,000.
YAD ZLATA 6406 STRATFORD RD CHEVY CHASE, MD 20815	NONE	OTHER PUBLIC CHARITY	CHARITABLE	250.
YEHUDA MOND FOUNDATION 812 HYDE COURT SILVER SPRING, MD 20902	NONE	OTHER PUBLIC CHARITY	CHARITABLE	18,786.
Total from continuation sheets				

Part XV Supplementary Information**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
YESHIVA BETH ABRAHAM OF JERUSALEM 73 W 47TH ST NEW YORK, NY 10036	NONE	OTHER PUBLIC CHARITY	CHARITABLE	1,000.
YESHIVA HIGH SCHOOL OF GREATER WASHINGTON 2010 LINDEN LANE SILVER SPRING, MD 20910	NONE	OTHER PUBLIC CHARITY	CHARITABLE	22,500.
YESHIVA OF GREATER WASHINGTON 2010 LINDEN LANE SILVER SPRING, MD 20910	NONE	OTHER PUBLIC CHARITY	CHARITABLE	25,000.
YESHIVA TORAH VODAATH AND MESIVTA 425 EAST 9TH STREET BROOKLYN, NY 11218	NONE	OTHER PUBLIC CHARITY	CHARITABLE	25,000.
YESHIVAS CHAFETZ CHAIM 76-01 147TH ST FLUSHING, NY 11367	NONE	OTHER PUBLIC CHARITY	CHARITABLE	500.
YESHIVAS MIR YERUSHALAYIM 5227 NEW UTRECHT AVE BROOKLYN, NY 11219	NONE	OTHER PUBLIC CHARITY	CHARITABLE	7,500.
YESHIVATH BETH MOSHE 930 HICKORY ST SCRANTON, PA 18501	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
YIEIP 11618 SEVEN LOCKS RD POTOMAC, MD 20854	NONE	OTHER PUBLIC CHARITY	CHARITABLE	25,666.
ZAKA 1040 FIRST AVE #303 NEW YORK, NY 10022	NONE	OTHER PUBLIC CHARITY	CHARITABLE	1,500.
ZICHRON MOSHE 262 ROUTE 306 MONSEY, NY 10952	NONE	OTHER PUBLIC CHARITY	CHARITABLE	100.
Total from continuation sheets				

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

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

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

OMB No 1545-0047

2015

Name of the organization

Employer identification number

BERMAN CHARITABLE TRUST

94-2940733

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)() (enter number) organization

☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation

☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation

☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or 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 33 1/3% 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 990-PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2015)

Name of organization

Employer identification number

BERMAN CHARITABLE TRUST

94-2940733

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	BE RETAIL LLC 5410 EDSON LANE #220 ROCKVILLE, MD 20852	\$ 100,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
2	BRIAN BERMAN 5410 EDSON LANE #220 ROCKVILLE, MD 20852	\$ 420,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)

Name of organization	Employer identification number
BERMAN CHARITABLE TRUST	94-2940733

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
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	

Name of organization

Employer identification number

BERMAN CHARITABLE TRUST

94-2940733

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 info. once) ▶ \$

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
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
BRIS LTD PARTNERSHIP	401.	0.	401.	401.	
BRIS-CHARLOTTE II LLC	1.	0.	1.	1.	
BRIS-CHARLOTTE LLC	2,249.	0.	2,249.	2,249.	
EDWARD JONES	107,399.	32,752.	74,647.	70,937.	
ISRAEL BONDS	26,000.	0.	26,000.	26,000.	
MORGAN STANLEY SMITH BARNEY HOLDINGS LLC	106,272.	2,195.	104,077.	99,952.	
PRUDENT CAPITAL II, LP	3.	0.	3.	3.	
TZG-SACHS CALL CENTER LLC	1.	0.	1.	1.	
TZG-SACHS EMPIRE LLC	91,709.	0.	91,709.	91,709.	
WBP ACQUISITION LLC	10.	0.	10.	10.	
TO PART I, LINE 4	334,045.	34,947.	299,098.	291,263.	

FORM 990-PF OTHER INCOME STATEMENT 2

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
BRIS LTD PARTNERSHIP	-528,591.	-528,591.	
PRUDENT CAPITAL II LP	-764.	-764.	
BRIS-CHARLOTTE LLC	-453,905.	-453,905.	
TZG-SACHS CALL CENTER LLC	19,339.	19,339.	
WBP ACQUISITION LLC	41,369.	41,369.	
OTHER MISCELLANEOUS INCOME	24,792.	24,792.	
BRIS LTD PARTNERSHIP	3,585,515.	3,585,515.	
BRIS-CHARLOTTE II LLC	-148,892.	-148,892.	
TOTAL TO FORM 990-PF, PART I, LINE 11	2,538,863.	2,538,863.	

FORM 990-PF	LEGAL FEES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PROFESSIONAL FEES	16,596.	16,595.		0.
TO FM 990-PF, PG 1, LN 16A	16,596.	16,595.		0.

FORM 990-PF	ACCOUNTING FEES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	18,216.	18,216.		0.
TO FORM 990-PF, PG 1, LN 16B	18,216.	18,216.		0.

FORM 990-PF	TAXES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES	143.	143.		0.
TO FORM 990-PF, PG 1, LN 18	143.	143.		0.

FORM 990-PF	OTHER EXPENSES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MISCELLANEOUS EXPENSES	233.	233.		0.
BRIS LTD PARTNERSHIP OTHER DEDUCTIONS	2,243.	2,243.		0.
BRIS-CHARLOTTE LLC OTHER DEDUCTIONS	245.	245.		0.
TZG-SACHS CALL CENTER LLC	2,412.	2,412.		0.
TZG - SACHS EMPIRE LLC	652.	652.		0.

BRIS-CHARLOTTE II LLC	6.	6.	0.
TO FORM 990-PF, PG 1, LN 23	5,791.	5,791.	0.

FORM 990-PF OTHER INCREASES IN NET ASSETS OR FUND BALANCES STATEMENT 7

DESCRIPTION	AMOUNT
INVESTMENT BASIS ADJUSTMENTS	493,132.
BASIS ADJUSTMENT FOR INHERITED PROPERTY	256,765.
TOTAL TO FORM 990-PF, PART III, LINE 3	749,897.

FORM 990-PF U.S. AND STATE/CITY GOVERNMENT OBLIGATIONS STATEMENT 8

DESCRIPTION	U.S. GOV'T	OTHER GOV'T	BOOK VALUE	FAIR MARKET VALUE
UNIV CALIF REGTS MED CTR #7576		X	0.	0.
LOS ANGELES CALIF UNI SCH DIST #7576		X	0.	0.
PUERTO RICO COMWLTH HWY & TRANSN #7576		X	0.	0.
NASSAU CNTY NY GEN IMPT-F #7576		X	0.	0.
NASSAU CNTY NY GEN IMPT-F #7576		X	0.	0.
UNIV CALIF REGTS MED CTR #8554		X	63,661.	76,413.
GLENDALE CALIF REDEV AGY TAX TXBLE B/E #0327		X	102,789.	112,877.
GLENDALE CALIF REDEV AGY TAX TXBLE B/E #7576		X	0.	0.
CHICAGO ILL MIDWAY ARPT REV TXBLE B/E #7576		X	0.	0.
TOTAL U.S. GOVERNMENT OBLIGATIONS				
TOTAL STATE AND MUNICIPAL GOVERNMENT OBLIGATIONS			166,450.	189,290.
TOTAL TO FORM 990-PF, PART II, LINE 10A			166,450.	189,290.

FORM 990-PF	CORPORATE STOCK	STATEMENT	9
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE	
CAMDEN PROPERTY TRUST #0327	52,753.	153,520.	
NATIONAL RETAIL PROPERTIES #0327	44,099.	200,250.	
COUNTRYWIDE CAP #0327	150,000.	153,780.	
CITIGROUP INC 11/15/06 #0327	21,039.	31,826.	
MERRILL LYNCH CAP TR II 6.45% #0327	200,000.	203,280.	
MORGAN STANLEY CAP TR 6.45% #0327	200,000.	202,480.	
FEDERAL REALTY INVT TR #7576	0.	0.	
BLACKROCK INC #0327	25,617.	28,944.	
BRISTOL MYERS SQUIBB CO #0327	24,996.	29,580.	
GENERAL ELECTRIC CO #0327	25,097.	31,150.	
PROCTER & GAMBLE #0327	25,038.	28,191.	
EDWARD JONES STOCKS	809,585.	1,283,536.	
EDWARD JONES EXCHANGE TRADED & CLOSED END FUNDS	107,876.	92,160.	
EDWARD JONES MUTUAL FUNDS	852,633.	789,088.	
EDWARD JONES BONDS	578,932.	639,040.	
TOTAL TO FORM 990-PF, PART II, LINE 10B	3,117,665.	3,866,825.	

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	10
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
ISRAEL BONDS	FMV	800,000.	800,000.
NUVEEN CREDIT STRATEGY INCOME & GROWTH #0327	FMV	48,288.	26,131.
PIMCO HIGH INCOME FUND #0327	FMV	97,556.	54,528.
BRIS-CHARLOTTE LLC	FMV	435,123.	4,482,494.
PRUDENT CAPITAL II, LP	FMV	52,475.	52,475.
TZG-SACHS EMPIRE LLC	FMV	758,356.	758,356.
TZG-SACHS CALL CENTER LLC	FMV	104,653.	104,653.
BRIT-CHARLOTTE HOLDING II	FMV	0.	0.
BRIS LIMITED PARTNERSHIP	FMV	2,966,573.	4,269,319.
BRIS-CHARLOTTE II LLC	FMV	1,583,990.	1,849,658.
WBP ACQUISITION LLC	FMV	0.	464,831.
TOTAL TO FORM 990-PF, PART II, LINE 13		6,847,014.	12,862,445.

FORM 990-PF	OTHER LIABILITIES	STATEMENT	11
DESCRIPTION	BOY AMOUNT	EOY AMOUNT	
BRIS LIMITED PARTNERSHIP	215,728.	0.	
WBP ACQUISITION LLC	417,590.	376,215.	
TOTAL TO FORM 990-PF, PART II, LINE 22	633,318.	376,215.	

FORM 990-PF	INTEREST AND PENALTIES	STATEMENT	12
TAX DUE FROM FORM 990-PF, PART VI		61,120.	
UNDERPAYMENT PENALTY		1,391.	
LATE PAYMENT INTEREST		1,241.	
LATE PAYMENT PENALTY		1,834.	
TOTAL AMOUNT DUE		65,586.	

FORM 990-PF	LIST OF SUBSTANTIAL CONTRIBUTORS PART VII-A, LINE 10	STATEMENT	13
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NAME OF CONTRIBUTOR	ADDRESS
BRIAN BERMAN	5410 EDSON LANE #220 ROCKVILLE, MD 20852

FORM 990-PF	LATE PAYMENT PENALTY			STATEMENT	14
DESCRIPTION	DATE	AMOUNT	BALANCE	MONTHS	PENALTY
TAX DUE	05/15/16	61,120.	61,120.	6	1,834.
DATE FILED	11/15/16		61,120.		
TOTAL LATE PAYMENT PENALTY					1,834.

FORM 990-PF

LATE PAYMENT INTEREST

STATEMENT 15

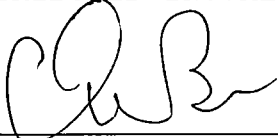
DESCRIPTION	DATE	AMOUNT	BALANCE	RATE	DAYS	INTEREST
TAX DUE	05/15/16	61,120.	61,120.	.0400	184	1,241.
DATE FILED	11/15/16		62,361.			
TOTAL LATE PAYMENT INTEREST						1,241.

FORM 990-PF


ELECTION UNDER REGULATIONS SECTION
53.4942(A)-3(D)(2) TO TREAT
EXCESS QUALIFYING DISTRIBUTIONS
AS DISTRIBUTIONS OUT OF CORPUS

STATEMENT 16

PURSUANT TO IRC SEC. 4942(H)(2) AND REG. 53.4942(A)-3(D)(2), BERMAN CHARITABLE TRUST, EIN 94-2940733, HEREBY ELECTS TO TREAT CURRENT YEAR QUALIFYING DISTRIBUTIONS IN EXCESS OF THE IMMEDIATELY PRECEDING TAX YEAR'S UNDISTRIBUTED INCOME AS BEING MADE OUT OF CORPUS.



DENNIS BERMAN, TRUSTEE



DATE