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Form 990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

OMB No 1545-0052

2015

Open to Public Inspection

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

Name of foundation Weisman Foundation co Judy Nadel		A Employer identification number 95-6027464	
Number and street (or P O box number if mail is not delivered to street address) 2373 Pacific Avenue		B Telephone number (see instructions) (415) 931-0869	
City or town, state or province, country, and ZIP or foreign postal code San Francisco, CA 94115		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change		Initial return of a former public charity ☐ Amended return ☐ Name change	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		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 ☐	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 1,025,628		J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)	

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) (see instructions))		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 Check ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	30,960	30,960	30,960	
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	-16,453			
	b Gross sales price for all assets on line 6a 519,725				
	7 Capital gain net income (from Part IV, line 2)				
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	14,507	30,960	30,960	
	13 Compensation of officers, directors, trustees, etc	4,000			4,000
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule).				
	b Accounting fees (attach schedule).	2,450	2,450		
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	76			
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings.				
	22 Printing and publications				
	23 Other expenses (attach schedule).	25			
	24 Total operating and administrative expenses. Add lines 13 through 23	6,551	2,450		4,000
	25 Contributions, gifts, grants paid	35,996			35,996
	26 Total expenses and disbursements. Add lines 24 and 25	42,547	2,450		39,996
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-28,040			
	b Net investment income (if negative, enter -0-)		28,510		
	c Adjusted net income (if negative, enter -0-)			30,960	

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	64,750	259,102	259,102
	2	Savings and temporary cash investments			
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions).			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)	61,314	61,314	61,091
	b	Investments—corporate stock (attach schedule)	787,027	404,010	402,453
	c	Investments—corporate bonds (attach schedule)	100,000	258,476	259,294
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans.			
	13	Investments—other (attach schedule)	35,688	37,337	43,088
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)	100	600	600	
16	Total assets(to be completed by all filers—see the instructions Also, see page 1, item I)	1,048,879	1,020,839	1,025,628	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule).			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities(add lines 17 through 22)		0	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds	1,028,531	1,028,531	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	20,348	-7,692	
	30	Total net assets or fund balances(see instructions)	1,048,879	1,020,839	
31	Total liabilities and net assets/fund balances(see instructions)	1,048,879	1,020,839		

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	1,048,879
2	Enter amount from Part I, line 27a	2	-28,040
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3	4	1,020,839
5	Decreases not included in line 2 (itemize) ▶ _____	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	1,020,839

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	-16,380
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	-3,299

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	47,910	1,077,681	0 04446
2013	47,721	1,054,824	0 04524
2012	44,968	1,034,918	0 04345
2011	43,396	1,034,283	0 04196
2010	40,925	1,030,600	0 03971

2	Total of line 1, column (d).	2	0 214817
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 042963
4	Enter the net value of noncharitable-use assets for 2015 from Part X, line 5.	4	1,060,602
5	Multiply line 4 by line 3.	5	45,567
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	285
7	Add lines 5 and 6.	7	45,852
8	Enter qualifying distributions from Part XII, line 4.	8	39,996

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

c

All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).

2

Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-).

3

Add lines 1 and 2.

4

Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-).

5

Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-.

6

Credits/Payments

a

2015 estimated tax payments and 2014 overpayment credited to 2015

6a

640

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.

8

Enter any **penalty** for underpayment of estimated tax. Check here ☒ if Form 2220 is attached.

9

Tax due. If the total of lines 5 and 8 is more than line 7, enter **amount owed**.

10

Overpayment. If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid**.

11

Enter the amount of line 10 to be **Credited to 2015 estimated tax** 70 **Refunded**

1

570

2

3

570

4

5

570

6a

640

6b

6c

6d

7

640

8

9

10

70

11

Part VII-A

Statements Regarding Activities

1a

During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?

1a

No

b

Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)?
If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.

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?
If "Yes," attach a detailed description of the activities.

2

No

3

Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes.*

3

No

4a

Did the foundation have unrelated business gross income of \$1,000 or more during the year?

4a

No

b

If "Yes," has it filed a tax return on **Form 990-T** for this year?

4b

No

5

Was there a liquidation, termination, dissolution, or substantial contraction during the year?
If "Yes," attach the statement required by General Instruction T.

5

No

6

Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:
• By language in the governing instrument, or
• By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?

6

No

7

Did the foundation have at least \$5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XV.*

7

Yes

8a

Enter the states to which the foundation reports or with which it is registered (see instructions):
CA

b

If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? *If "No," attach explanation.*

8b

Yes

9

Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)?
If "Yes," complete Part XIV.

9

No

10

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

10

No

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶N/A	13	Yes	
14	The books are in care of ▶Judy Nadel Located at ▶2373 Pacific Avenue San Francisco CA Telephone no ▶(415) 931-0869 ZIP+4 ▶941151241			
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		No
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		No
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2015 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015.</i>) ☐	3b		No
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

No

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
Judy W Nadel	Co-Trustee	2,000		
2373 Pacific Avenue	2 00			
San Francisco, CA 94115				
Jay Nadel	Co-Trustee	0		
2373 Pacific Avenue	0 00			
San Francisco, CA 94115				
Sharon Frankel	Co-Trustee	2,000		
411 W End Avenue	2 00			
New York, NY 10024				
Noel Frankel	Co-Trustee	0		
411 W End Avenue	0 00			
New York, NY 10024				

2

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

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

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

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Part VIII

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services.

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
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	1,036,809
b	Average of monthly cash balances.	1b	39,944
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	1,076,753
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	
3	Subtract line 2 from line 1d.	3	1,076,753
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	16,151
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,060,602
6	Minimum investment return. Enter 5% of line 5.	6	53,030

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	53,030
2a	Tax on investment income for 2015 from Part VI, line 5.	2a	570
b	Income tax for 2015 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	570
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	52,460
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	52,460
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	52,460

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	39,996
b	Program-related investments—total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	39,996
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	39,996
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				52,460
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only.			31,347	
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2015				
a From 2010.				
b From 2011.				
c From 2012.				
d From 2013.				
e From 2014.				
f Total of lines 3a through e.				
4 Qualifying distributions for 2015 from Part XII, line 4 ▶ \$ _____ 39,996				
a Applied to 2014, but not more than line 2a			31,347	
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2015 distributable amount.				8,649
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2015 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b Taxable amount—see instructions				
e Undistributed income for 2014 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015.				43,811
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.				
10 Analysis of line 9				
a Excess from 2011.				
b Excess from 2012.				
c Excess from 2013.				
d Excess from 2014.				
e Excess from 2015.				

Part XIV

b Check box to indicate whether the organization is a private operating foundation described in section 170(c)(2)(B)(i) or 170(c)(2)(B)(ii): ☐ 170(c)(2)(B)(i) or ☐ 170(c)(2)(B)(ii)

b 85% of line 2a

d Amounts included in line 2c not used directly for active conduct of exempt activities

3 Complete 3a, b, or c for the alternative test relied upon

a "Assets" alternative test—enter

(1) Value of all assets

(2) Value of assets qualifying
under section 4942(j)(3)(B)(i)

b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . .

c "Support" alternative test—enter

(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . .

(3) Largest amount of support from an exempt organization

(4) Gross investment income

Part XV

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

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

Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a The name, address, and telephone number or email address of the person to whom applications should be addressed

b The form in which applications should be submitted and information and materials they should include

c Any submission deadlines

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

[illegible]

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	35,996
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

Form **990-PF** (2015)

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

List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	Date acquired (c) (mo , day, yr)	(d) Date sold (mo , day, yr)
237 00000 Kinder Morgan Inc	P	2014-12-03	2015-10-27
10,099 40 Osterweis Fund	P	2001-01-01	2015-12-28
14,752 04 Osterweis Strategic Fund	P	2011-01-01	2015-12-15
40,000 00 General Electric 4 65% 15 Due 08/15/15	P	2009-08-04	2015-08-15
Schwab Capital Gain Distributions	P	2014-01-01	2015-12-31
Wash Sale			

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
6,472		9,844	-3,372
262,452		315,358	-52,906
167,076		170,976	-3,900
40,000		40,000	
43,725			43,725
			73

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	
			-3,372
			-52,906
			-3,900
			43,725

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>				
Stanford Jazz Workshop 541 Lasuen Mall Stanford, CA 94305	NONE	PC	To dedicate to jazz education and appreciation and support jazz artists, educators, students and enthusiasts	500
New Israel Fund 330 Seventh Avenue 11th Floor New York, NY 10001	NONE	PC	To advance democracy and equality for all Israelis	5,700
Museum of Modern Art 11 West 53 Street New York, NY 10019	NONE	PC	To encourage an ever-deeper understanding and enjoyment of modern and contemporary art by the diverse local, national and international audiences	260
Whitney Museum 945 Madison Avenue at 75th Street New York, NY 10021	NONE	PC	To collect, preserve, interpret and exhibiting American art	85
Theatre Development Fund 520 Eighth Avenue Suite 801 New York, NY 10018	NONE	PC	To identify and provide support, including financial assistance, to theatrical works of artistic merit	3,000
ASPCA 424 E 92nd St New York, NY 10128	NONE	PC	To provide effective means for the prevention of cruelty to animals throughout the United States	200
THIRTEEN 825 Eighth Avenue New York, NY 10019	NONE	PC	To use media to create lifelong learning opportunities	350
Film Society of Lincoln Center 70 Lincoln Center Plaza New York, NY 10023	NONE	PC	To celebrate American and international cinema, to recognize and support new filmmakers, and to enhance awareness, accessibility and understanding of film	275
Food Bank of New York City 39 Broadway New York, NY 10006	NONE	PC	To end hunger in New York City by organizing food, information and support for community survival and dignity	1,000
Robin Hood 826 Broadway 9th Floor New York, NY 10003	NONE	PC	To find, fund and partner with programs that have proven they are an effective remedy to poverty and are a consistence force for good in the lives of New Yorkers in need	2,000
Congregation Emanu-El 2 Lake Street San Francisco, CA 94118	NONE	PC	To advance members' lifelong involvement in Judaism, engaging them in communal prayer (avodah), the study of sacred texts (Torah), and the performance of compassionate deeds (g'milut hasadim)	1,675
Fine Arts Museum 50 Hagiwara Tea Garden Drive San Francisco, CA 94118	NONE	PC	To provide extensive and innovative art education programs for people of all ages and interests	900
Jewish Family and Children's Servic 2150 Post St San Francisco, CA 94115	NONE	PC	To serve people with the highest quality, research-based social services designed to strengthen individuals, strengthen families and strengthen communities	500
Garden for the Environment 451 Hayes Street 2nd Floor San Francisco, CA 94102	NONE	PC	To maintain a nationally acclaimed one-acre urban demonstration garden and offer environmental education programs about organic gardening, urban compost systems and sustainable food systems	250
Children's Defense Fund 25 E Street NW Washington, DC 20001	NONE	PC	To ensure every child a Healthy Start, a Head Start, a Fair Start, a Safe Start and a Moral Start in life and successful passage to adulthood with the help of caring families and communities	500
Total				35,996

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>				
Coalition for the Homeless 468 Turk Street San Francisco, CA 94102	NONE	PC	To defend homeless and low-income people from attacks on their rights and their persons, while advocating for permanent solutions to homelessness that take into account not only poverty's devastating effects, but also its root causes	1,000
Doctors Without Borders 333 7th Avenue 2nd Floor New York, NY 10001	NONE	PC	To bring quality medical care to people in crisis regardless of their race, religion, or political affiliation	1,000
Massachusetts Advocates for Childre 25 Kingston Street 2nd Floor Boston, MA 02111	NONE	PC	To help children overcome significant barriers to equal educational and life opportunities, while helping one child at a time	1,000
J Street Education Fund PO Box 66073 Washington, DC 20035	NONE	PC	To change the U S political dynamics around Israel by mobilizing broad support for a two-state solution because it's in Israels and Americas interest	1,000
San Francisco Jazz 201 Franklin Street San Francisco, CA 94102	NONE	PC	To reach, develop and nurture current and future musicians and audiences by providing rich, innovative, interactive and informative programming in jazz appreciation, creation and performance within our diverse communities	600
Jewish Home for the Aged 302 Silver Avenue San Francisco, CA 94112	NONE	PC	To become a regional resource as an integral part of a continuum of care throughout the Bay Area that provides senior adults with a variety of life enriching programs and services that are accessible, promote individual dignity, encourage independence, connect them to their community, and reflect the social, cultural, and spiritual values of Jewish tradition	2,500
Wounded Warrior Project 4899 Belfort Road Suite 300 Jacksonville, FL 32256	NONE	PC	To raise awareness and enlist the public's aid for the needs of injured service members To help injured service members aid and assist each other To provide unique, direct programs and services to meet the needs of injured service members	100
University of California Regents 1111 Franklin St12th floor Oakland, CA 94607	NONE	PC	Its about striving, every day, to ensure the University of California remains the best public university in the world	2,231
Breast Cancer Charitities of Americ 8505 Technology Forest Pl Ste 604 The Woodlands, TX 77381	NONE	PC	To eliminate breast cancer as a life-threatening disease	1,000
Wildwood School 12201 Washington Place Los Angeles, CA 90066	NONE	PC	To provide students with a rigorously intellectual and innovative academic program, preparing them to become individuals who are reflective, ethically grounded, and confident in their ability to learn and lead amid the competing priorities of a complex, evolving, and multicultural world	1,000
WNYC 160 Varick Street New York, NY 10013	NONE	PC	To support New York's flagship public radio stations, broadcasting the finest programs from NPR, American Public Media, Public Radio International and the BBC World Service, as well as a wide range of award-winning local programming	180
Planned Parenthood 67 Holly Hill Rd Greenwich, CT 06830	NONE	PC	To ensure access to quality health care, education, and information for all individuals and families worldwide	100
Hatzolah 318 Penn Street Brooklyn, NY 11211	NONE	PC	To provide exemplary medical emergency service to the public	200
JCC Dance-a-Thon 760 Northfield Avenue West Orange, NJ 07052	NONE	PC	To bring people together while providing educational, social, cultural and fitness programs	150
Plan International 155 Plan Way Warwick, RI 02886	NONE	PC	A child rights organization working with communities in many countries to alleviate child poverty so that children can realize their full potential	360
Total			3a	35,996

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>				
National Wildlife Federation PO Box 1583 Merrifield,VA 22116	NONE	PC	To protect natural resources and safeguarding America's wildlife and wild places for future generations	100
Sloan Kettering 1275 York Avenue New York, NY 10065	NONE	PC	Memorial Sloan Kettering Cancer Center is a cancer treatment and research institution in New York City, founded in 1884 as the New York Cancer Hospital In more than 100 laboratories, Sloan Kettering scientists conduct innovative research to advance understanding in the biological sciences and improve human health	500
Museum of Art Design 2 Columbus Circle New York, NY 10019	NONE	PC	To help support the Museum's exhibitions and educational programs	100
Metropolitan Museum 1000 5th Avenue New York, NY 10028	NONE	PC	To support the metropolitan and assist in meeting the cost of keep exhibitions open, protect the collection, support education programs and provide the Museum with additional funding in area where it is needed most	210
The Uni Project 6 Varick Street 10B New York, NY 10013	NONE	PC	The Uni-Project is a nonprofit that brings learning opportunities to public space in New York City Using custom-designed installations, we pop up in parks, plazas, and other public spaces to offer reading, drawing, and hands-on activities that let New Yorkers embrace the act of learning They partner with community organizations and city agencies, and prioritize undeserved locations	1,000
Brooklyn Workforce Innovation 621 Degraw Street Brooklyn, NY 11217	NONE	PC	Brooklyn Workforce Innovations (BWI) helps jobless and working poor New Yorkers establish careers in sectors that offer good wages and opportunities for advancement BWI was founded January 1, 2000 and is an affiliated of Fifth Avenue Committee, Inc , a South Brooklyn community development corporation BWI's mission is to empower low- and moderate-income people by creating living-wage employment opportunities and access to career paths BWI seeks to develop programs that counter prevailing market inequalities (especially those based on race or gender) and contribute to a broader movement for economic justice	1,000
Drive Change 630 Flushing Avenue Brooklyn, NY 11206	NONE	PC	The organization's Theory of Change is built on principals that will broaden access to opportunity for court involved youth and lower the likelihood that someone will be re-intercepted by the system Young people coming home from jail and prison face massive hurdles to employment and educational opportunities, the streets of their futures are paved with red lights, stop signs, dead ends and do-not-enters The work of Drive change is rooted in the commitment to use the food truck industry as a tool to broaden access to opportunity for young people coming home so they can live crime-free, bright futures Drive change offers a six to eight month Fellowship with the goal to place all Fellows into an academic or employment opportunity upon completion of the Fellowship	200
San Francisco Chamber Orchestra PO Box 191564 San Francisco, CA 94119	NONE	PC	Since its founding in 1953, the San Francisco Chamber Orchestra has been an active voice in the Bay Area music community, presenting a series of annual concerts that highlight some of the regions top professional musicians The SFCO is dedicated to making classical music accessible to audiences of all ages and backgrounds across the Bay Area by providing fully professional, admission-free concerts and educational programming The organization is also committed to inspiring and enlightening the next generation of music lovers through several outreach programs	250
Concerts by the Square 1469 McAllister Street San Francisco, CA 94115	NONE	PC	Concerts by the Square offers a distinctly old world style of salon music experience, but the musical offerings are fresh and wide-ranging	320
American Association of Immunology 1451 Rockville Pike Suite 650 Rockville, MD 20852	NONE	PC	The American Association of Immunologists is an association of professionally trained scientists from all over the world dedicated to advancing the knowledge of immunology and its related disciplines, fostering the interchange of ideas and information among investigators, and addressing the potential integration of immunologic principles into clinical practice The American Association of Immunologists serves its members by providing a center for the dissemination of information relevant to the field and its practices, such as educational and professional opportunities, scientific meetings, membership-derived issues and opinions, and important social and political issues AAI owns and publishes The Journal of Immunologythe largest and most highly cited journal in the field	200
Stanford University 450 Serra Mall Stanford, CA 94305	NONE	PC	To support a combination of financial aid, academic innovation and student life initiatives	1,500
St Jude Hospital 311 California Street 650 San Francisco, CA 94104	NONE	PC	To advance cures and means of prevention for pediatric catastrophic diseases through research and treatment	1,000
Total.			3a	35,996

TY 2015 Accounting Fees Schedule

Name: Weisman Foundation
co Judy Nadel

EIN: 95-6027464

Software ID: 15000324

Software Version: 2015v2.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Accounting Fees	2,450	2,450	0	0

TY 2015 Investments Corporate Bonds Schedule

Name: Weisman Foundation
co Judy Nadel

EIN: 95-6027464

Software ID: 15000324

Software Version: 2015v2.0

Name of Bond	End of Year Book Value	End of Year Fair Market Value
Schwab/Goldman Sachs 4.25%	60,000	62,324
Schwab/GE Cap Corp 4.65%		
Schwab/BP Capital Mkt 3.814%24F	51,616	49,874
Schwab/JP Morgan Chase 3.25%22	45,101	45,269
Schwab/Monsanto Co 2.75%21	44,128	44,277
Schwab/Anheuser-Busch 2.625%23	57,631	57,550

TY 2015 Investments Corporate Stock Schedule

Name: Weisman Foundation
co Judy Nadel

EIN: 95-6027464

Software ID: 15000324

Software Version: 2015v2.0

Name of Stock	End of Year Book Value	End of Year Fair Market Value
Amer/Dfa Emer Mkt Val Ptf	3,853	2,406
Amer/Dfa Intl Sm Cap	12,376	11,127
Amer/Dfa US Sm Cap	2,589	2,630
Amer/Dfa Intl Value Ptf	11,558	8,095
Amer/Dfa Global Equity Ptf	17,353	20,021
Osterweis/Osterweis Strat Inc Fund	113,646	102,884
Schwab/Osterweis Fund		
Schwab/Vanguard High Dividend	91,975	110,015
Schwab/Vanguard Total Stock Market	40,907	44,788
Schwab/Vanguard Total World	49,751	48,955
Schwab/Kinder Morgan Inc.	10,002	3,639
Schwab/Pimco Incm CL D:Pondx	25,000	23,745
Schwab/Vanguard Interm Term Investment	25,000	24,148

TY 2015 Investments Government Obligations Schedule

Name: Weisman Foundation
co Judy Nadel

EIN: 95-6027464

Software ID: 15000324

Software Version: 2015v2.0

**US Government Securities - End of
Year Book Value:**

**US Government Securities - End of
Year Fair Market Value:**

**State & Local Government
Securities - End of Year Book
Value:**

61,314

**State & Local Government
Securities - End of Year Fair
Market Value:**

61,091

TY 2015 Investments - Other Schedule

Name: Weisman Foundation
co Judy Nadel

EIN: 95-6027464

Software ID: 15000324

Software Version: 2015v2.0

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
Schwab/Vanguard REIT	AT COST	37,337	43,088

TY 2015 Other Assets Schedule

Name: Weisman Foundation
co Judy Nadel

EIN: 95-6027464

Software ID: 15000324

Software Version: 2015v2.0

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
Oil & Gas Right - Nominal Value	100	100	100
Receivable		500	500

TY 2015 Other Expenses Schedule

Name: Weisman Foundation
co Judy Nadel

EIN: 95-6027464

Software ID: 15000324

Software Version: 2015v2.0

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Filing Fee	25			

TY 2015 Taxes Schedule

Name: Weisman Foundation
co Judy Nadel

EIN: 95-6027464

Software ID: 15000324

Software Version: 2015v2.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Foreign Taxes	76			