

Form **990-PF**


Return of Private Foundation

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

▶ Do not enter social security numbers on this form as it may be made public.

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

OMB No 1545-0052

2015
Open to Public Inspection

Department of the Treasury
Internal Revenue Service

For calendar year 2015, or tax year beginning 07-01-2015

, and ending 06-30-2016

Name of foundation The Zachs Family Foundation Inc		A Employer identification number 06-1157320
Number and street (or P O box number if mail is not delivered to street address) 40 Woodland Street	Room/suite	B Telephone number (see instructions) (860) 727-5733
City or town, state or province, country, and ZIP or foreign postal code Hartford, CT 06105		C If exemption application is pending, check here ☐
G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col (c), line 16) ▶ \$ 28,147,409	J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (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 ☐

Part I Analysis of Revenue and Expenses <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</i>		Revenue and expenses per books (a)	Net investment income (b)	Adjusted net income (c)	Disbursements for charitable purposes (d) (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	200			
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	16	16		
	4 Dividends and interest from securities	1,085,636	1,085,636		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10 _____	1,231,361			
	b Gross sales price for all assets on line 6a _____ 2,070,345				
	7 Capital gain net income (from Part IV , line 2)		1,231,361		
	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)	 -79,437	-79,437		
	12 Total. Add lines 1 through 11	2,237,776	2,237,576		
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule).				
	b Accounting fees (attach schedule).				
	c Other professional fees (attach schedule)	 31,681	31,861		
	17 Interest	2,935	2,935		
	18 Taxes (attach schedule) (see instructions)	 25,028	25,028		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings.				
	22 Printing and publications				
	23 Other expenses (attach schedule).				
	24 Total operating and administrative expenses. Add lines 13 through 23	59,644	59,824		0
	25 Contributions, gifts, grants paid	1,347,726			1,347,726
	26 Total expenses and disbursements. Add lines 24 and 25	1,407,370	59,824		1,347,726
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursement	830,406			
	b Net investment income (if negative, enter -0-)		2,177,752		
	c Adjusted net income (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	99,251	51,496	51,496
	2	Savings and temporary cash investments	6,475	401,138	401,138
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions).			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	14,333,656	15,909,797	21,363,598
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	5,966,327	6,283,023	6,331,177
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)				
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	20,405,709	22,645,454	28,147,409	
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons	870,000	1,009,861	
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)	870,000	1,009,861	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg, and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	19,535,709	21,635,593	
	30	Total net assets or fund balances (see instructions)	19,535,709	21,635,593	
31	Total liabilities and net assets/fund balances (see instructions)	20,405,709	22,645,454		

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 19,535,709
2	Enter amount from Part I, line 27a	2 830,406
3	Other increases not included in line 2 (itemize) ▶ _____	3 1,269,478
4	Add lines 1, 2, and 3	4 21,635,593
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 21,635,593

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 Losses (from col (h)) (l)
(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	1,231,361
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	430,690

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 nonchantable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2014	997,300	26,119,455	0 03818
2013	988,598	19,908,015	0 04966
2012	495,028	13,223,707	0 03744
2011	186,454	9,250,970	0 02016
2010	219,290	12,478,197	0 01757

2	Total of line 1, column (d).	2	0 163004
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 032601
4	Enter the net value of noncharitable-use assets for 2015 from Part X, line 5.	4	26,098,859
5	Multiply line 4 by line 3.	5	850,849
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	21,778
7	Add lines 5 and 6.	7	872,627
8	Enter qualifying distributions from Part XII, line 4.	8	1,347,726

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 VII

Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		1	21,778
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	
3 Add lines 1 and 2.		3	21,778
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	
5 Tax based on investment income.Subtract line 4 from line 3 If zero or less, enter -0-		5	21,778
6 Credits/Payments			
a 2015 estimated tax payments and 2014 overpayment credited to 2015	6a	64,553	
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	64,553
8 Enter any penalty for underpayment of estimated tax Check here ☒ if Form 2220 is attached		8	
9 Tax due.If the total of lines 5 and 8 is more than line 7, enter amount owed		9	
10 Overpayment.If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	42,775
11 Enter the amount of line 10 to be Credited to 2015 estimated tax 42,775 Refunded		11	

Part VII-A

Statements Regarding Activities

1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	Yes	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities	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	Yes	
7 Did the foundation have at least \$5,000 in assets at any time during the year?If "Yes," complete Part II, col (c), and Part XV	7	Yes	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) CT			
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 ▶ Dawn Griswold Telephone no ▶ (860) 727-5733 Located at ▶ 40 Woodland Street Hartford CT ZIP+4 ▶ 06105			
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	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	No 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? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015).	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
Henry M Zachs 181 Mountain Springs Road Farmington, CT 06032	President 0 00	0		
Judith M Zachs 20090 Boca West Drive 342 Boca Raton, FL 33434	V President/Secr 0 00	0		
Enc Zachs 53 Norwood Rd West Hartford, CT 06117	Director 0 00	0		
William Zachs 9 DICK PLACE EDINBURGH, SCOTLAND EH 2 JS UK	Director 0 00	0		

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

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

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

Part VIII

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
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	20,574,874
b	Average of monthly cash balances.	1b	612,291
c	Fair market value of all other assets (see instructions).	1c	6,540,000
d	Total (add lines 1a, b, and c).	1d	27,727,165
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	100,000
2	Acquisition indebtedness applicable to line 1 assets.	2	1,230,861
3	Subtract line 2 from line 1d.	3	26,496,304
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	397,445
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	26,098,859
6	Minimum investment return. Enter 5% of line 5.	6	1,304,943

Part XI Distributable Amount(see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6.	1	1,304,943
2a	Tax on investment income for 2015 from Part VI, line 5.	2a	21,778
b	Income tax for 2015 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	21,778
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	1,283,165
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	1,283,165
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	1,283,165

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	1,347,726
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	1,347,726
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	21,778
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	1,325,948

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years

Part XIII

Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2014	(c) 2014	(d) 2015
1 Distributable amount for 2015 from Part XI, line 7				1,283,165
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only.				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2015				
a From 2010.				
b From 2011.				
c From 2012.				
d From 2013.				79,531
e From 2014.				
f Total of lines 3a through e.	79,531			
4 Qualifying distributions for 2015 from Part XII, line 4 ▶ \$ 1,347,726				
a Applied to 2014, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2015 distributable amount.				1,283,165
e Remaining amount distributed out of corpus	64,561			
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	144,092			
b Prior years' undistributed income Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b Taxable amount—see instructions				
e Undistributed income for 2014 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015.				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).				
8 Excess distributions carryover from 2010 not applied on line 5 or line 7 (see instructions). . .				
9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a.	144,092			
10 Analysis of line 9				
a Excess from 2011. . . .				
b Excess from 2012. . . .				
c Excess from 2013. . . .				79,531
d Excess from 2014. . . .				
e Excess from 2015. . . .				64,561

Part XIV

Private Operating Foundations (see instructions and Part VII-A, question 9)

1a

If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2015, enter the date of the ruling.

b

Check box to indicate whether the organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a

Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

Tax year	Prior 3 years			(e) Total
(a) 2015	(b) 2014	(c) 2013	(d) 2012	
b 85% of line 2a				
c Qualifying distributions from Part XII, line 4 for each year listed				
d Amounts included in line 2c not used directly for active conduct of exempt activities				
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c				
3 Complete 3a, b, or c for the alternative test relied upon				
a "Assets" alternative test—enter				
(1) Value of all assets				
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)				
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.				
c "Support" alternative test—enter				
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)				
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).				
(3) Largest amount of support from an exempt organization				
(4) Gross investment income				

Part XV

Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see instructions.)

1

Information Regarding Foundation Managers:

a

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

Henry M Zachs

b

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

2

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

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

a

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

b

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

c

Any submission deadlines

d

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

Form 990-PF (2015)

Part XV

Supplementary Information(continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			▶ 3a	1,347,726
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)

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

(1) Cash.

(2) Other assets.

(1)	Sales of assets to a noncharitable exempt organization.	
(2)	Purchases of assets from a noncharitable exempt organization.	
(3)	Rental of facilities, equipment, or other assets.	
(4)	Reimbursement arrangements.	
(5)	Loans or loan guarantees.	
(6)	Performance of services or membership or fundraising solicitations.	

d If the answer to any of the above is "Yes," complete the following schedule. Column **(b)** should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column **(d)** the value of the goods, other assets, or services received.

[illegible]

b If "Yes," complete the following schedule

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

**Sign
Here**

* * * * *

Title

May the IRS discuss this return with the preparer shown below

(see instr)? ☒ Yes ☐ No

(see instr)? ☒ Yes ☐ No

Phone no (860) 916-1724

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

List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
2000 Shares Receptos	P	2014-07-16	2015-07-15
5000 Shares Oaktree Cap Group	P	2014-07-11	2015-08-13
3000 Shares Receptos	P	2014-07-16	2015-08-28
5000 Shares spectrum Brands Holding	P	2013-08-20	2015-08-13
950 Calls FTR Oct	P	2015-09-02	2015-09-30
950 Calls FTR Jan	P	2015-09-30	2015-11-30
950 Calls FTR May	P	2016-02-23	2016-05-09
500 Shares American Renal Assoc	P	2016-04-21	2016-04-21
1000 Shares MGM Growth PPTYS	P	2016-04-20	2016-04-20
200 Shares MGM Growth PPTYS	P	2016-04-20	2016-04-20

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
457,572		74,160	383,412
271,154		238,141	33,013
690,000		111,240	578,760
498,673		310,892	187,781
9,174		3,213	5,961
17,712		8,183	9,529
18,628		4,955	13,673
12,963		11,000	1,963
22,338		21,000	1,338
4,468		4,200	268

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	
			383,412
			33,013
			578,760
			187,781
			5,961
			9,529
			13,673
			1,963
			1,338
			268

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)
500 Shares Secureworks	P	2016-04-22	2016-04-22
300 Shares Grupo Superville	P	2016-05-19	2016-05-19
1000 Shares Grupo Superville	P	2016-05-19	2016-05-19
1000 Shares Red Rock resorts	P	2016-04-27	2016-04-27
500 Shares US FoodsHlgd	P	2016-05-26	2016-03-26
K-1s Line 8	P	2015-07-01	2015-12-31
K-1s Line 9	P	2014-01-01	2015-12-31

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	Gain or (loss) (h) (e) plus (f) minus (g)
7,020		7,000	20
3,375		3,000	375
11,250		11,000	250
18,694		19,500	-806
12,058		11,500	558
14,149			14,149
1,117			1,117

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			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	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			20
			375
			250
			-806
			558
			14,149
			1,117

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>				
American Cancer Society 260 Osborne road Loudonville, NY 12211	none	Public	GENERAL USE	100
Beth El Temple 2626 ALBANY AVE WEST HARTFORD, CT 06117	member	Public	GENERAL USE	11,320
The Bushnell 166 CAPITOL AVE HARTFORD, CT 06106	trustee	Public	GENERAL USE	22,280
Chabad House 2352 ALBANY AVE WEST HARTFORD, CT 06117	none	Public	GENERAL USE	3,000
Charter Oak Cultural Center 21 CHARTER OAK AVE HARTFORD, CT 06104	none	Public	GENERAL USE	7,000
CPTV 1049 ASYLUM AVENUE HARTFORD, CT 06105	none	Public	GENERAL USE	500
Ct Historical Society ONE ELIZABETH STREET HARTFORD, CT 06105	trustee	Public	GENERAL USE	7,750
Hadassah 740 NORTH MAIN STREET WEST HARTFORD, CT 06117	none	Public	GENERAL USE	1,000
Hartford Public Library 500 MAIN STREET HARTFORD, CT 06103	none	Public	GENERAL USE	500
Hebrew High School OF NEW ENGLAND 300 BLOOMFIELD AVENUE WEST HARTFORD, CT 06117	Director	Public	GENERAL USE	23,129
Hill-Stead Museum 35 MOUNTAIN ROAD FARMINGTON, CT 06032	none	Public	GENERAL USE	3,000
Jewish Community CENTER 333 BLOOMFIED AVENUE WEST HARTFORD, CT 06117	none	Public	GENERAL USE	25,500
PMCJimmy Fund 10 BROOKLINE PLACE WEST BROOKLINE, MA 02445	none	Public	GENERAL USE	250
REAL ART WAYS 56 ARBOR STREET HARTFORD, CT 06106	none	Public	GENERAL USE	12,500
University of Connecticut Ballard I 2390 ALUMNI DRIVE STORRS, CT 06269	none	PRIVATE	GENERAL USE	2,000
Total ▶ 3a				1,347,726

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
University of Hartford-Hillel 200 BLOOMFIELD AVENUE WEST HARTFORD,CT 06117	Advisor	Public	GENERAL USE	25,000
Wadsworth Atheneum 600 MAIN STREET HARTFORD,CT 06103	trustee	Public	GENERAL USE	31,100
Susan Komen Cancer Foundation 5005 LBJ FREEWAY DALLAS,TX 75244	none	Public	GENERAL USE	2,000
JFACT 40 WOODLAND STREET HARTFORD,CT 06105	none	Public	GENERAL USE	5,000
Jewish Federation 333 BLOOMFIELD AVENUE WEST HARTFORD,CT 06117	Director	Public	GENERAL USE	231,000
HEBREW Health Care 1 ABRAHMS BLVD WEST HARTFORD,CT 06117	none	Public	GENERAL USE	1,000
Connecticut Science Center 250 COLUMBUS BLVD HARTFORD,CT 06103	none	PUBLIC	GENERAL USE	2,500
Oak Hill School Foundation 120 HOLCOMB STREET HARTFORD,CT 06112	trustee	PUBLIC	GENERAL USE	7,000
Camp Laurelwood 463 SUMMER HILL ROAD MADISON,CT 06443	none	PUBLIC	GENERAL USE	405,000
Nalt Conference for Community Justi 820A PROSPECT HILL RD WINDSOR,CT 06095	none	PUBLIC	GENERAL USE	11,500
Beth David Synagogue 20 DOVER ROAD WEST HARTFORD,CT 06119	none	PUBLIC	GENERAL USE	2,500
Hartford Stage 50 CHURCH STREET HARTFORD,CT 06103	none	PUBLIC	GENERAL USE	17,000
CONNECTICUT COLLEGE-Hillel 270 MOHEGAN AVENUE NEW LONDON,CT 06320	none	PUBLIC	Hillel House	5,000
Trinity College Wakinson Library 300 Summit Street Hartford,CT 06106	trustee	PUBLIC	general use	12,500
Trinity College 300 Summit Street Hartford,CT 06106	graduate	PUBLIC	General Use	30,000
Total ▶ 3a				1,347,726

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>				
Theater Works 233 Pearl Street Hartford, CT 06103	none	PUBLIC	General Use	1,000
Connecticut Explored PO Box 271561 West Hartford, CT 06127	none	PUBLIC	General Use	100
Hartford Hospital 80 Seymour Street Hartford, CT 06102	corporator	PUBLIC	General Use	10,450
Jewish Family Services 333 Bloomfield Avenue West Hartford, CT 06117	none	PUBLIC	General Use	6,000
Nutmeg Big Brothers Big Sisters 30 Laurel Street Hartford, CT 06106	none	PUBLIC	General Use	500
Solomon Schecher Day School 26 Buena Vista Road West Hartford, CT 06107	trustee	PUBLIC	General Use	66,972
Junior Achievement 193 Grand Sreet Waterbury, CT 06702	none	PUBLIC	General Use	1,500
Birthright Israel Foundation 33 East 33rd Street New York, NY 10016	none	PUBLIC	General Use	6,000
Young Israel of West Hartford 2240 Albany Ave West Hartford, CT 06117	none	PUBLIC	General Use	1,040
Hillel Internation 800 8th Steet NW Washington, DC 20001	none	PUBLIC	General Use	2,500
University of Hartford -Greenberg C 200 Bloomfield Avenue West hartford, CT 06117	Advisor	PUBLIC	Greenberg Center	5,000
Goodspeed Opera House 6 Main Street East Haddam, CT 06423	none	PUBLIC	General Use	1,500
Hartford Symphony Orchestra 166 Capitol Avenue Hartford, CT 06106	none	PUBLIC	General Use	13,900
United Synagogues 205 Mohawk Drive West Hartford, CT 06117	none	PUBLIC	General Use	100
Capital Community College 950 Main Street Hartford, CT 06103	none	PC	General Use	1,000
Total ▶ 3a				1,347,726

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
Anti Defamation League 1952 Whitney Ave Hamden,CT 06517	none	PC	General Use	1,000
Agudas Achim Synagogue 1244 Nmain Street West Hartford,CT 06067	none	PC	General Use	300
Alzheimer Association 2075Silas Deane hwy Rocky Hill,CT 06067	none	PC	General Use	1,000
American Beethoven Society One Washington Sq San Jose,CA 95152	none	PC	General Use	100
American Heart Association 1 Union Street Robinsville,NJ 08691	none	PC	General Use	100
American Lung Association PO Box 7000 Albert Lea,MN 56007	none	PC	General Use	100
American Red Cross PO Box 5003 Hartford,CT 06102	none	PC	General Use	100
American School for the Deaf 139 North Main street West Hartford,CT 06102	none	PC	General Use	200
American Society for Yad Vashem 500 Fifth Avenue New York,NY 10110	none	PC	General Use	100
AmericanTechnion Society One Gateway Center Newton,MA 02458	none	PC	General Use	1,000
Ancient Burying Ground Assn PO BOX 347 Hartfod,CT 06141	none	PC	General Use	200
Armory Art Center 1700 Parker Ave West Palm Beach,FL 33401	none	PC	General Use	1,000
Arthritis Foundation 35 Cold Spring Rd Hill,CT 06067	none	PC	General Use	500
Boys and Girls Club Hartford 170 Sigourney Street Hartford,CT 06105	none	PC	GENERASL USE	200
B'nai B'rith Foundatioon-Uconn 54 north eagle rd storrs,CT 06269	none	PC	General Use	31,300
Total ▶ 3a				1,347,726

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>				
Camp Courant 285 Broad Street Hartford,CT 06115	none	PC	General Use	1,000
Camp Ramah 39 Bennet Street Palmer,MA 01069	none	PC	General Use	1,000
Chai Mitzvah 106 Timberwood Rd West Hartford,CT 06117	none	PC	General Use	2,500
CT Childrens Medical Center 282 Washington Street Hartford,CT 06106	none	PC	General Use	10,000
Ct Freemason foundation PO BOX 250 Wallingford,CT 06492	none	PC	General Use	100
Connecticut Hospice PO Box793 Bradford,CT 06405	none	PC	General Use	250
Easter Seals 100 Deerfield road Windsor,CT 06095	none	PC	General Use	100
Farmington Police Benevolent Assn PO BOX 312 Unionville,CT 06085	none	PC	General Use	65
Federation Homes 156 Winterberry Ave Bloomfield,CT 06002	none	PC	General Use	100
Florence Griswold Museum 96 Lyme Street Old Lyme,CT 06371	none	PC	General Use	3,500
Foundation for Jewish Camp 253 west 35th street New York,NY 10001	none	PC	General Use	1,000
Greater Hartford Art Council PO Box 23143 Hartford,CT 06123	none	PC	General Use	3,000
HARC 900 Asylum Ave Hartford,CT 06105	none	PC	General Use	5,000
Hebrew Academy 53 Gage Road Bloomfield,CT 06002	none	PC	General Use	20,000
InterfaithFamilycom PO Box 428 Newton,MA 02464	none	PC	General Use	500
Total ▶ 3a				1,347,726

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>				
JDRF 20 Batterson Park Road Farmington, CT 06032	none	PC	General Use	5,000
Jewish Assoc for Community Living I 90 Asylum Avenue Hartford, CT 06105	none	PC	General Use	1,000
Jewish Coalition for Literacy 333 Bloomfield Ave West Hartford, CT 06117	none	PC	General Use	500
Jewish Funders Network 150 west 30th street New york, NY 10001	none	PC	General Use	1,000
Jewish Historical Society 333 Bloomfield Ave West Hartford, CT 06117	TRUSTEE	PC	General Use	1,000
Jordan River Village 244 Madison ave New York, NY 10016	none	PC	General Use	5,000
JT Connect 333 Bloomfield Ave West Hartford, CT 06117	none	PC	General Use	5,000
Katherine Hepburn Cultural arts Cen 300 Main Street Old Saybrook, CT 06475	none	PC	General Use	100
KESHET 284 Armory Street Jamaica Plains, MA 02130	none	PC	General Use	15,000
Kingswood Oxford 170 Kingswood Road West Hartford, CT 06119	none	PC	General Use	200
Lambda Legal 120 Wall Street New York, NY 10005	none	PC	General Use	100
The Leukemia Lymphoma Society PO Box 4072 Pittsfield, MA 01202	none	PC	General Use	100
Loomis Chaffee 4 Batchelder road Windsor, CT 06095	none	PC	General Use	2,000
MAAD 317 Foxon road East Haven, CT 06513	none	PC	General Use	100
The Mark Twain House 351 Farmington Ave Hartford, CT 06105	none	PC	General Use	1,000
Total ▶ 3a				1,347,726

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>				
Masoncare Charity Foundation PO Box 70 Wallingford, CT 06492	none	PC	General Use	100
Mental Health Assn 61 South Main Street West Hartford, CT 06107	none	PC	General Use	100
Mercaz USA 136 East 39 th Streect New York, NY 10016	none	PC	General Use	100
The Metropolitan Opera Lincoln Center New York, NY 10023	none	PC	General Use	250
National Multiple Scierosis Society 659 Tower Ave Hartford, CT 06112	none	PC	General Use	100
Muscular Distrophy Assn 127 Washington ave West North Haven, CT 06473	none	PC	General Use	100
National Yiddish Book Center 1021 West Street Amherst, MA 01002	none	PC	General Use	180
New Britain Museum of American Art 56 Lexington street New Britain, CT 06052	none	PC	General Use	2,000
Old Lyme Fire Dept 69 lyme SStreet Old Lyme, CT 06371	none	PC	General Use	200
Riverfront recapture 50 Colubus Blvd hartford, CT 06106	none	PC	General Use	250
Memorial Sloan Kettering Cancer Cen 1275 York Avenue New York, NY 10065	none	PC	General Use	500
ST Francis Foundation 95 Woodland Street Hartford, CT 06105	none	PC	General Use	12,600
The Washington Institute 1828 L Street NW Washington, DC 20036	none	PC	General Use	1,000
United States Holocaust Memorial PO Box 90988 Washington, DC 20090	none	PC	General Use	200
United Way Foundation 30 Laurel Street Hartford, CT 06106	none	PC	General Use	10,000
Total ▶ 3a				1,347,726

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
University of Hartford Art School 200 Bloomfield Avenue West Hartford, CT 06117	none	PC	General Use	1,000
Unversity of Pennsylvania 3451 Walnut street Philadelphia, PA 19104	ALUMNI	PC	General Use 15000Hillel 500 Kelly Writers 500Wharton 15000	31,000
Pitt Annual Fund 128 North Craig Street Pittsburgh, PA 15260	none	PC	General Use	100
University of St Joseph 1678 Asylum avenue West hartford, CT 06117	none	PC	General Use	1,500
Urban League of Greater Hartford 140 Woodland Street Hartford, CT 06105	none	PC	General Use	1,000
VNA Healthcare 103 Woodland Street Hartford, CT 06105	none	PC	General Use	1,500
The Williston Northampon School 19 Payson Avenue East Hampton, MA 01027	ALUMNI	PC	General Use	30,000
YMCA Greater Hartford 241 Trumbull Street Hartford, CT 06103	none	PC	General Use	250
ACLU 330 Main street Hartford, CT 06106	none	PC	General use	3,000
University of Hartford Hartt School 200 Bloomfield ave West hartford, CT 06117	none	PC	General Use	1,500
Girl Scouts of Ct 340 washington Street Hartford, CT 06106	none	PC	General Use	1,000
Hartford Blooms Garden Tours 111 Charter oak Avenue Hartford, CT 06105	none	PC	General Use	100
Playhouse Theater Group 244 ParkRroad West Hartford, CT 06119	none	PC	General Use	250
CT State NAACP 2074 Park Street Hartford, CT 06104	none	PC	General Use	500
Trinity College Hillel 300 summit street Hartford, CT 06106	ALUMNI	PC	General Use	40,000
Total ▶ 3a				1,347,726

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
Jewish Community Foundation 333 Bloomfield ave West Hartford, CT 06117	TRUSTEE	PF	Lillian fund 200Zachs PJ Lib 10000Real Art Ways 20000	32,000
Camp Eisner 160 Chubb Ave Lyndhurst, NJ 07071	none	PC	General Use	1,000
NationalBrain Tumor Society 55 Chapel Street Newton, MA 02458	none	PC	General Use	180
Conservative Synagogue of Fifth Ave 11E 11TH STREET NEW YORK, NY 10003	none	PC	GENERAL USE	360
George Washington University 2033 K Street NW Washington, DC 20052	ALUMNI	PC	gENERAL uSE	500
BBYO 360 Amity Road Woodbridge, CT 06525	none	PC	General Use	1,000
The Hartford Foundation For Public G 10 Colubus Blvd Hartford, CT 06106	none	PF	Real Artways Benefit	20,000
Bated Breath Theatre Compamy 233 Pearl Street Hartford, CT 06103	none	PC	General Use	1,000
Jewish National Fund 77 Franklin Street Boston, MA 02114	none	PC	General Use	300
Sidney A Perry Fund For Jewish Lead 300 Amity Road Woodbridge, CT 06525	none	PC	General Use	1,800
Jewish War Veterans 1811 R street NW Washington, DC 20009	none	PC	General Use	100
Jonathans Dream Fund-JCC 335 Bloomfield Ave West Hartford, CT 06117	none	PC	General Use	1,000
Simpson - Wavery School 55 Waverly School Hartford, CT 06112	none	PC	Toys	100
MSMAF PO Box 197 Collinsville, CT 06019	none	PC	General Use	100
Total ▶ 3a				1,347,726

TY 2015 Investments Corporate Stock Schedule**Name:** The Zachs Family Foundation Inc**EIN:** 06-1157320**Software ID:** 15000324**Software Version:** 2015v3.0

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ARC CHINA LTD-CREG	65,488	6,996
Vodafone Group PLC	4,314,917	7,547,292
Sprint Corp.	5,000	1,001,823
Verizon Communications	5,917,491	6,854,472
ATT	1,535,870	1,901,240
Ctrip.Com Intl LTD	585,426	824,000
Caesars Acquistions	45,645	59,275
Caesars Entertainment	106,882	38,450
Coca Cola	397,144	453,300
Opka Heath Inc	366,445	467,000
T-Mobile US	335,990	519,240
Glaxo Smith Kline	241,530	216,700
Apple	145,000	143,400
Bluebird Bio	623,915	173,160
Dish Network	328,950	262,000
Frontier Communications	475,950	469,300
HRG Group	330,650	343,250
Teva Pharma	87,504	82,700

TY 2015 Investments - Other Schedule

Name: The Zachs Family Foundation Inc

EIN: 06-1157320

Software ID: 15000324

Software Version: 2015v3.0

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
Macquarie Infrastructure Co LLC	AT COST	222,096	370,250
Calumet Specialty Products Ptrs	AT COST	192,805	192,805
PLATINUM PARTNERS VA FUND	AT COST	253,080	153,080
BAYBERRY CONSUMER FINANCE FUND	AT COST	384,316	384,316
CONFORMIS-SERIES E1	AT COST	75,000	75,000
CONFORMIS-SERIES E2	AT COST	75,000	75,000
Woodland Towers LLC	AT COST	1,124,953	1,124,953
Iconiq Strategic Partners B LP	AT COST	1,382,588	1,382,588
Iconiq Opportunities Fund 2 LP	AT COST	452,171	452,171
Mutualink Inc.	AT COST	500,000	500,000
Malbridge Energy Finance fund II	AT COST	311,866	311,866
Shem Creek Capital Fund III LLC	AT COST	166,211	166,211
Iconiq Access LP Series X	AT COST	12,548	12,548
Iconiq Strategic Partners II BLP	AT COST	529,528	529,528
LA -ZA of Hartford LLC	AT COST	360,861	360,861

TY 2015 Loans from Officers Schedule

Name: The Zachs Family Foundation Inc

EIN: 06-1157320

Software ID: 15000324

Software Version: 2015v3.0

Item No.	1
Lender's Name	Henry M Zachs
Lender's Title	Manager
Original Amount of Loan	870000
Balance Due	870000
Date of Note	2015-01
Maturity Date	
Repayment Terms	
Interest Rate	
Security Provided by Borrower	
Purpose of Loan	Investments
Description of Lender Consideration	
Consideration FMV	

Item No.	2
Lender's Name	Henry M Zachs
Lender's Title	Manager
Original Amount of Loan	
Balance Due	139861
Date of Note	2015-09
Maturity Date	
Repayment Terms	
Interest Rate	
Security Provided by Borrower	
Purpose of Loan	Investments
Description of Lender Consideration	
Consideration FMV	

TY 2015 Other Income Schedule**Name:** The Zachs Family Foundation Inc**EIN:** 06-1157320**Software ID:** 15000324**Software Version:** 2015v3.0

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
Other Investment Income	-79,437	-79,437	

TY 2015 Other Increases Schedule**Name:** The Zachs Family Foundation Inc**EIN:** 06-1157320**Software ID:** 15000324**Software Version:** 2015v3.0

Description	Amount
K-1s issued at 12/31 whereas the foundation year end 6/30.	1,269,478

TY 2015 Other Professional Fees Schedule**Name:** The Zachs Family Foundation Inc**EIN:** 06-1157320**Software ID:** 15000324**Software Version:** 2015v3.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Investment expenses	31,681	31,861	0	0

TY 2015 Taxes Schedule**Name:** The Zachs Family Foundation Inc**EIN:** 06-1157320**Software ID:** 15000324**Software Version:** 2015v3.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Federal taxes	25,000	25,000		
Foreign taxes	28	28		

Schedule B

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

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

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

OMB No 1545-0047

2015

Name of the organization	Employer identification number
The Zachs Family Foundation Inc	06-1157320

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 other property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. ▶ \$ _____

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization The Zachs Family Foundation Inc	Employer identification number 06-1157320
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Part I Contributors (see instructions) Use duplicate copies of Part I if additional space is needed			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	Henry M Zachs	\$ 480,450	Person ☐
	181 Mountain Springs Road		Payroll ☐
	Farmington, CT 06032		Noncash ☒ (Complete Part II for noncash contributions)
2	Henry M Zachs	\$ 319,000	Person ☐
	181 Mountain Springs Road		Payroll ☐
	Farmington, CT 06032		Noncash ☒ (Complete Part II for noncash contributions)
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)
		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)

Name of organization The Zachs Family Foundation Inc	Employer identification number 06-1157320
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Part II	Noncash Property (see instructions) Use duplicate copies of Part II if additional space is needed
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(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	15,000 shares of Vodafone Group PLC	\$ 480,450	2015-12-23
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
2	10,000 Shares of Vodafone Group PLC	\$ 319,000	2015-12-18
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	

Name of organization The Zachs Family Foundation Inc	Employer identification number 06-1157320
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Part III Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ► \$ _____

Use duplicate copies of Part III if additional space is needed

(a) No.from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
--		_____	
_____		_____	
(a) No.from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
--		_____	
_____		_____	
(a) No.from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
--		_____	
_____		_____	
(a) No.from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
	_____	_____	_____
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
_____		_____	
_____		_____	
--		_____	
_____		_____	