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For calendar year 2015, or tax year beginning 09-01-2015 , and ending 08-31-2016

Name of foundation DRS MARIE UBERTI BENZ AND ROBERT L BENZ FOUNDATION		A Employer identification number 20-0219069	
Number and street (or P O box number if mail is not delivered to street address) PO BOX 345		Room/suite	
City or town, state or province, country, and ZIP or foreign postal code NARBERTH, PA 19072		B Telephone number (see instructions) (610) 453-0354	
G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		C If exemption application is pending, check here ☐ D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐ E If private foundation status was terminated under section 507(b)(1)(A), check here ☐ F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation			
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 694,402		J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis)	

Part I Analysis of Revenue and Expenses <i>(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))</i>		Revenue and expenses per books (a)	Net investment income (b)	Adjusted net income (c)	Disbursements for charitable purposes (d) (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	1	1		
	4 Dividends and interest from securities	33,642	33,642		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	-3,667			
	b Gross sales price for all assets on line 6a 18,668				
	7 Capital gain net income (from Part IV, line 2)		0		
	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)	134	134		
	12 Total. Add lines 1 through 11	30,110	33,777		
	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule).				
	b Accounting fees (attach schedule).	3,500	1,750		1,750
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	112	1		0
	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	3,612	1,751		1,750
	25 Contributions, gifts, grants paid	38,718			38,718
	26 Total expenses and disbursements. Add lines 24 and 25	42,330	1,751		40,468
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-12,220			
	b Net investment income (if negative, enter -0-)		32,026		
	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	15,087	261	261
	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)	90,843	90,843	112,217
	b	Investments—corporate stock (attach schedule)	272,236	265,057	270,180
	c	Investments—corporate bonds (attach schedule)	252,428	262,213	311,744
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	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)	630,594	618,374	694,402	
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	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	-116,752	-116,752	
	28	Paid-in or capital surplus, or land, bldg, and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	747,346	735,126	
30	Total net assets or fund balances (see instructions)	630,594	618,374		
31	Total liabilities and net assets/fund balances (see instructions)	630,594	618,374		

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)	1 630,594
2	Enter amount from Part I, line 27a	2 -12,220
3	Other increases not included in line 2 (itemize) ▶ _____	3 0
4	Add lines 1, 2, and 3	4 618,374
5	Decreases not included in line 2 (itemize) ▶ _____	5 0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6 618,374

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 D—Donation (b)	Date acquired (c) (mo , day, yr)	Date sold (d) (mo , day, yr)
1 a	EMC CORP MASS	P		2016-06-20
b	LINNCO LLC	P		2016-07-29
c	SOUTHERN COPPER CORP	P		2016-07-13
d	PPL ENERGY SUPPLY NOTES	P		2016-05-16
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 4,146		2,777	1,369
b 13		7,402	-7,389
c 9,509		7,644	1,865
d 5,000		4,512	488
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			1,369
b			-7,389
c			1,865
d			488
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	-3,667
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	

Part V

Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)
If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No
If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2014	30,722	677,544	0 045343
2013	32,290	650,955	0 049604
2012	29,861	635,595	0 046981
2011	27,761	608,149	0 045648
2010	24,662	595,792	0 041394

2	Total of line 1, column (d).	2	0 228970
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 045794
4	Enter the net value of noncharitable-use assets for 2015 from Part X, line 5.	4	672,289
5	Multiply line 4 by line 3.	5	30,787
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	320
7	Add lines 5 and 6.	7	31,107
8	Enter qualifying distributions from Part XII, line 4.	8	40,468

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)

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

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 Refunded

1

2

3

4

5

6a

6b

6c

6d

7

8

9

10

11

320

0

320

0

320

380

60

0

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?

1b

Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)?

1c

Did the foundation file Form 1120-POL for this year?

2

Has the foundation engaged in any activities that have not previously been reported to the IRS?

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?

4a

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

4b

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

5

Was there a liquidation, termination, dissolution, or substantial contraction during the year?

6

Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either

7

Did the foundation have at least \$5,000 in assets at any time during the year?

8a

Enter the states to which the foundation reports or with which it is registered

8b

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?

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

10

Did any persons become substantial contributors during the tax year?

Yes

No

No

No

No

No

No

Yes

Yes

Yes

No

No

Form 990-PF (2015)

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 ▶ MARIE ROBERT BENZ Telephone no ▶ (610) 453-0354 Located at ▶ 301 S WOODBINE AVE PENN VALLEY PA ZIP+4 ▶ 19072			
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		
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2015?	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015? ☐ Yes ☒ No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2015 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2015?	4b		No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (Continued)

5a

During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc , organization described in section 4945(d)(4)(A)? (see instructions).

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

b

If any answer is "Yes" to 5a(1)–(5), did **any**of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

5b

Organizations relying on a current notice regarding disaster assistance check here.

☐

c

If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945–5(d)

6a

Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

b

Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

No

If "Yes" to 6b, file Form 8870

7a

At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

b

If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

7b

Part VIII

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

1

List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation(If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
DR MARIE UBERTI BENZ 301 S WOODBINE AVE PENN VALLEY, PA 19072	TRUSTEE 1 00	0	0	0
DR ROBERT L BENZ 301 S WOODBINE AVE PENN VALLEY, PA 19072	TRUSTEE 1 00	0	0	0

2

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

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

Total

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

0

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.

0

Part IX-A

Summary of Direct Charitable Activities

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

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 N/A	0
2	
All other program-related investments. See instructions.	
3	

Total. Add lines 1 through 3

0

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	666,767
b	Average of monthly cash balances.	1b	15,760
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	682,527
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	682,527
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	10,238
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	672,289
6	Minimum investment return. Enter 5% of line 5.	6	33,614

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	33,614
2a	Tax on investment income for 2015 from Part VI, line 5.	2a	320
b	Income tax for 2015 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	320
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	33,294
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	33,294
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	33,294

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	40,468
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	40,468
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	320
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	40,148

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				33,294
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only.			33,031	
b Total for prior years 20____, 20____, 20____		0		
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.	0			
4 Qualifying distributions for 2015 from Part XII, line 4 ► \$ 40,468				
a Applied to 2014, but not more than line 2a			33,031	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2015 distributable amount.				7,437
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2015 (If an amount appears in column (d), the same amount must be shown in column (a))	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
b Prior years' undistributed income Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2014 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015.				25,857
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2010 not applied on line 5 or line 7 (see instructions). . .	0			
9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a.	0			
10 Analysis of line 9				
a Excess from 2011. . . .				
b Excess from 2012. . . .				
c Excess from 2013. . . .				
d Excess from 2014. . . .				
e Excess from 2015. . . .				

Part XIV

b

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

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Part XV

1

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

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

2

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

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

mitted and information and materials they should include

M ALL INFORMATION THAT THE REQUESTING ORGANIZATION DEEMS

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

CTIONS ON AWARDS OTHER THAN THEY BE USED FOR QUALIFIED PURPOSES

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	38,718
b Approved for future payment				
Total			▶ 3b	0

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2015)

Part XVII

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

[illegible]

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

b If "Yes," complete the following schedule

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

Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge				
	***** _____ Signature of officer or trustee	2016-10-31 _____ Date	***** _____ Title	May the IRS discuss this return with the preparer shown below (see instr)? ☒ Yes ☐ No	
Paid Preparer Use Only	Print/Type preparer's name RUTH R TANUR CPA	Preparer's Signature 	Date 	Check if self-employed ☐	PTIN P00085416
	Firm's name ☐ ISDANER & COMPANY LLC			Firm's EIN ☐ 23-6410283	
	Firm's address ☐ THREE BALA PLAZA SUITE 501 WEST BALA CYNWYD, PA 190043484			Phone no (610) 668-4200	

Form 990PF Part XV Line 1a - 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).

DR MARIE UBERTI BENZ

DR ROBERT L BENZ

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>				
ACADEMY OF NATURAL SCIENCES - DREXEL UNIV 1900 BENJAMIN FRANKLIN PKWY PHILADELPHIA,PA 19103	NONE	CHARITABLE ORGANIZAT	CHARITABLE PURPOSES	220
BARNES FOUNDATION 2025 BENJAMIN FRANKLIN PKWY PHILADELPHIA,PA 19130	NONE	CHARITABLE ORGANIZAT	CHARITABLE PURPOSES	247
BEAT THE STREETS 714 MARKET ST 402 PHILADELPHIA,PA 19106	NONE	CHARITABLE ORGANIZAT	CHARITABLE PURPOSES	250
BRYN MAWR FILM INSTITUTE 824 W LANCASTER AVE BRYN MAWR,PA 19010	NONE	CHARITABLE ORGANIZAT	CHARITABLE PURPOSES	1,000
CAPE MAY COUNTY ZOOLOGICAL SOCIETY PO BOX 864 CAPE MAY COURT HOUSE,NJ 08210	NONE	CHARITABLE ORGANIZAT	CHARITABLE PURPOSES	1,000
FRIENDS OF THE AVALON VOLUNTEER FIRE DEPT 3100 DUNE DR AVALON,NJ 08202	NONE	CHARITABLE ORGANIZAT	CHARITABLE PURPOSES	75
FRIENDS OF THE CYNWYD HERITAGE TRAIL PO BOX 695 BALA CYNWYD,PA 19004	NONE	CHARITABLE ORGANIZAT	CHARITABLE PURPOSES	750
JEFFERSON MEDICAL COLLEGE 1020 WALNUT ST PHILA,PA 19107	NONE	CHARITABLE ORGANIZAT	CHARITABLE PURPOSES	400
KIMMEL CENTER 260 S BROAD ST PHILA,PA 19102	NONE	CHARITABLE ORGANIZAT	CHARITABLE PURPOSES	2,500
LANKENAU HOSPITAL 100 E LANCASTER AVE WYNNEWOOD,PA 19096	NONE	CHARITABLE ORGANIZAT	CHARITABLE PURPOSES	15,500
MAIN LINE REFORM TEMPLE 410 MONTGOMERY AVE WYNNEWOOD,PA 19096	NONE	CHARITABLE ORGANIZAT	CHARITABLE PURPOSES	1,500
MANN MUSIC CENTER 5201 PARKSIDE AVE PHILA,PA 19131	NONE	CHARITABLE ORGANIZAT	CHARITABLE PURPOSES	750
NATIONAL CONSTITUTION CENTER 525 ARCH ST INDEPENDENCE MALL PHILA,PA 19106	NONE	CHARITABLE ORGANIZAT	CHARITABLE PURPOSES	250
NATIONAL KIDNEY FOUNDATION 111 S INDEPENDENCE MALL E STE 411 PHILADELPHIA,PA 19106	NONE	CHARITABLE ORGANIZAT	CHARITABLE PURPOSES	5,600
NATIONAL MUSEUM OF AMERICAN JEWISH HISTORY 101 S INDEPENDENCE MALL EAST PHILA,PA 19106	NONE	CHARITABLE ORGANIZAT	CHARITABLE PURPOSES	360
Total ▶ 3a				38,718

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>				
OPERATION PARENT 7512 CAMBRIDGE DR CRESTWOOD,KY 40014	NONE	CHARITABLE ORGANIZAT	CHARITABLE PURPOSES	100
PHILADELPHIA MURAL ARTS PROGRAM 1729 MT VERNON ST PHILA,PA 19130	NONE	CHARITABLE ORGANIZAT	CHARITABLE PURPOSES	150
PHILADELPHIA MUSEUM OF ART 26TH ST BENJAMIN FRANKLIN PKWY PHILADELPHIA,PA 19130	NONE	CHARITABLE ORGANIZAT	CHARITABLE PURPOSES	396
PHILADELPHIA ZOO 3400 W GIRARD AVE PHILADELPHIA,PA 19104	NONE	CHARITABLE ORGANIZAT	CHARITABLE PURPOSES	302
STONE HARBOR RESCUE SQUAD 96TH 2ND AVE STONE HARBOR,NJ 08247	NONE	CHARITABLE ORGANIZAT	CHARITABLE PURPOSES	75
STONE HARBOR VOLUNTEER FIRE DEPT PO BOX 539 STONE HARBOR,NJ 08247	NONE	CHARITABLE ORGANIZAT	CHARITABLE PURPOSES	75
THE FRANKLIN INSTITUTE 222 N 20TH ST PHILA,PA 19103	NONE	CHARITABLE ORGANIZAT	CHARITABLE PURPOSES	248
UNIVERSITY OF PENNSYLVANIA 3451 WALNUT ST PHILADELPHIA,PA 19104	NONE	CHARITABLE ORGANIZAT	CHARITABLE PURPOSES	5,600
NATIONAL BREAST CANCER COALITION 1010 VERMONT AVE NW STE 900 WASHINGTON,DC 20005	NONE	CHARITABLE ORGANIZAT	CHARITABLE PURPOSES	500
US OLYMPIC COMMITTEE 1 OLYMPIC PLAZA COLORADO SPRINGS,CO 80909	NONE	CHARITABLE ORGANIZAT	CHARITABLE PURPOSES	20
LIVING BEYOND BREAST CANCER 40 MONUMENT RD STE 104 BALA CYNWYD,PA 19004	NONE	CHARITABLE ORGANIZAT	CHARITABLE PURPOSES	50
NETWORK FOR GOOD INC 1140 CONNECTICUT AVE NW STE 700 WASHINGTON,DC 20036	NONE	CHARITABLE ORGANIZAT	CHARITABLE PURPOSES	100
NEW JERSEY AUDUBON SOCIETY 9 HARDSCRABBLE RD BERNARDSVILLE,NJ 07924	NONE	CHARITABLE ORGANIZAT	CHARITABLE PURPOSES	100
SEPTEMBER 11 NATIONAL MEMORIAL TRAIL ALLIANCE 5000 LIBERTY WOODS LN WOODBIDGE,VA 22193	NONE	CHARITABLE ORGANIZAT	CHARITABLE PURPOSES	250
VOLUNTEER MEDICAL SERVICE CORPS OF LOWER MERION 101 SIBLEY AVE ARDMORE,PA 19003	NONE	CHARITABLE ORGANIZAT	CHARITABLE PURPOSES	100
Total ▶ 3a				38,718

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>				
KLIGMAN PENN FUND 3451 WALNUT ST STE 305 PHILADELPHIA,PA 19104	NONE	CHARITABLE ORGANIZAT	CHARITABLE PURPOSES	250
Total ▶ 3a				38,718

TY 2015 Accounting Fees Schedule

Name: DRS MARIE UBERTI BENZ AND
ROBERT L BENZ FOUNDATION

EIN: 20-0219069

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	3,500	1,750		1,750

TY 2015 Investments Corporate Bonds Schedule

Name: DRS MARIE UBERTI BENZ AND
ROBERT L BENZ FOUNDATION

EIN: 20-0219069

Name of Bond	End of Year Book Value	End of Year Fair Market Value
RBC WEALTH MANAGEMENT	262,213	311,744

TY 2015 Investments Corporate Stock Schedule

Name: DRS MARIE UBERTI BENZ AND
ROBERT L BENZ FOUNDATION

EIN: 20-0219069

Name of Stock	End of Year Book Value	End of Year Fair Market Value
TD WATERHOUSE	132,557	124,536
RBC WEALTH MANAGEMENT	132,500	145,644

TY 2015 Investments Government Obligations Schedule

Name: DRS MARIE UBERTI BENZ AND
ROBERT L BENZ FOUNDATION

EIN: 20-0219069

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

0

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

0

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

90,843

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

112,217

TY 2015 Other Income Schedule

Name: DRS MARIE UBERTI BENZ AND
ROBERT L BENZ FOUNDATION

EIN: 20-0219069

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
TERRA NITROGEN COMPANY LP	134	134	134

TY 2015 Taxes Schedule

Name: DRS MARIE UBERTI BENZ AND
ROBERT L BENZ FOUNDATION

EIN: 20-0219069

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL TAX	111	0		0
FOREIGN TAX	1	1		0