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Form **990-PF**

Return of Private Foundation

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

OMB No 1545-0052

2015Department of the Treasury
Internal Revenue Service

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

Open to Public Inspection

For calendar year 2015 or tax year beginning 12/01/15, and ending 11/30/16

Name of foundation THE CARL & NANCY GEWIRZ FUND, INC.		A Employer identification number 52-1387044
Number and street (or P O box number if mail is not delivered to street address) 7117 GLENBROOK ROAD	Room/suite	B Telephone number (see instructions) 703-356-5005
City or town, state or province, country, and ZIP or foreign postal code BETHESDA MD 20814-1224		C If exemption application is pending, check here ☐
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		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) ▶ \$ 12,003,502	J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐
(Part I, column (d) must be on cash basis)		

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (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	121	121		
	4 Dividends and interest from securities	5,958	5,958		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a				
	7 Capital gain net income (from Part IV, line 2)				
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
b Less Cost of goods sold					
c Gross profit or (loss) (attach schedule)					
11 Other income (attach schedule) STMT 1	500,315	500,315			
12 Total. Add lines 1 through 11	506,394	506,394	0		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	6,227	2,847		3,380
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits	98,893	45,208		53,685
	16a Legal fees (attach schedule) SEE STMT 2	4,395			4,395
	b Accounting fees (attach schedule) STMT 3	30,857			30,857
	c Other professional fees (attach schedule)				
	17 Interest	142			142
	18 Taxes (attach schedule) (see instructions) STMT 4	3,621	6		3,615
	19 Depreciation (attach schedule) and depletion STMT 5	316	316		
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (att sch) STMT 6	2,706	130		2,576
	24 Total operating and administrative expenses. Add lines 13 through 23	147,157	48,507	0	98,650
	25 Contributions, gifts, grants paid	273,816			273,816
26 Total expenses and disbursements. Add lines 24 and 25	420,973	48,507	0	372,466	
27 Subtract line 26 from line 12.					
a Excess of revenue over expenses and disbursements	85,421				
b Net investment income (if negative, enter -0-)		457,887			
c Adjusted net income (if negative, enter -0-)			0		

For Paperwork Reduction Act Notice, see Instructions.

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Part II Balance Sheets		Beginning of year	End of year	
			(a) Book Value	(b) Book Value
Assets	1 Cash – non-interest-bearing	113,176	113,175	113,175
	2 Savings and temporary cash investments	285,707	563,148	563,148
	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 (att schedule) ▶ SEE WRK 540,864 Less allowance for doubtful accounts ▶ 0	606,074	540,864	540,864
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments – U.S. and state government obligations (attach schedule)			
	b Investments – corporate stock (attach schedule)			
	c Investments – corporate bonds (attach schedule)			
	11 Investments – land, buildings, and equipment basis ▶ Less accumulated depreciation (attach sch) ▶			
	12 Investments – mortgage loans			
	13 Investments – other (attach schedule) SEE STATEMENT 7	3,736,089	3,591,675	10,783,440
	14 Land, buildings, and equipment basis ▶ 18,012 Less accumulated depreciation (attach sch) ▶ STMT 8 17,537	791	475	475
Liabilities	15 Other assets (describe ▶ SEE STATEMENT 9)	2,400	2,400	2,400
	16 Total assets (to be completed by all filers – see the instructions Also, see page 1, item I)	4,744,237	4,811,737	12,003,502
	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 ▶ SEE STATEMENT 10)	22,500	4,579	
	23 Total liabilities (add lines 17 through 22)	22,500	4,579	
	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ▶ ☐			
Net Assets or Fund Balances	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	1,300,108	1,300,108	
	29 Retained earnings, accumulated income, endowment, or other funds	3,421,629	3,507,050	
	30 Total net assets or fund balances (see instructions)	4,721,737	4,807,158	
	31 Total liabilities and net assets/fund balances (see instructions)	4,744,237	4,811,737	

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	4,721,737
2 Enter amount from Part I, line 27a	2	85,421
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	4,807,158
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	4,807,158

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)		(b) How acquired P – Purchase D – Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a N/A				
b				
c				
d				
e				
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)	
a				
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))	
a				
b				
c				
d				
e				
2 Capital gain net income or (net capital loss)			2	
If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7				
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)			3	
If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8				

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

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2014	456,088	11,640,093	0.039183
2013	449,356	11,670,751	0.038503
2012	411,094	5,052,854	0.081359
2011	436,232	5,033,331	0.086669
2010	387,845	5,111,419	0.075878
2 Total of line 1, column (d)			2 0.321592
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 0.064318
4 Enter the net value of noncharitable-use assets for 2015 from Part X, line 5			4 11,756,605
5 Multiply line 4 by line 3			5 756,161
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 4,579
7 Add lines 5 and 6			7 760,740
8 Enter qualifying distributions from Part XII, line 4			8 372,466

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 – see instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ 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	9,158
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	2	0
3	Add lines 1 and 2	3	9,158
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)	4	0
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	9,158
6	Credits/Payments		
a	2015 estimated tax payments and 2014 overpayment credited to 2015	6a	6,800
b	Exempt foreign organizations – tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	4,800
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments Add lines 6a through 6d	7	11,600
8	Enter any penalty for underpayment of estimated tax Check here ☒ if Form 2220 is attached	8	18
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	2,424
11	Enter the amount of line 10 to be Credited to 2016 estimated tax 2,424 Refunded	11	

Part VII-A Statements Regarding Activities

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

N/A

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	Yes	No
				X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► CARL GEWIRZ 7117 GLENBROOK ROAD Located at ► BETHESDA MD ZIP+4 ► 20814-1224 Telephone no ► 301-951-7117			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 – Check here and enter the amount of tax-exempt interest received or accrued during the year	15		
16	At any time during calendar year 2015, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►	16	Yes	No
				X

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

1a	During the year did the foundation (either directly or indirectly)		Yes	No
(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	N/A	1b	
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2015?	N/A	1c	
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015? If "Yes," list the years ► 20 , 20 , 20 , 20	☐	Yes	☒ No
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement – see instructions.)	N/A	2b	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 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	X
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a	X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2015?		4b	X

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions) ☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

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

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

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? **N/A** ☐ Yes ☐ No

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

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** ☒

If "Yes" to 6b, file Form 8870

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? **N/A** **7b**

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
CARL GEWIRZ 7117 GLENBROOK ROAD BETHESDA MD 20814-1224	DIR/PRES 20.00	6,227	98,893	0
NANCY GEWIRZ 7117 GLENBROOK ROAD BETHESDA MD 20814-1224	DIRECTOR 0.50	0	0	0
VICTORIA GEWIRZ 48 SWARTHMORE ROAD WELLESLEY MA 02482-6609	DIRECTOR 0.25	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	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

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

0

Form 990-PF (2015) **THE CARL & NANCY GEWIRZ FUND, INC.** 52-1387044Page **7****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 N/A	
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	
2	
All other program-related investments See instructions	
3	
Total. Add lines 1 through 3 ▶	

Form **990-PF** (2015)

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	0
b	Average of monthly cash balances	1b	553,614
c	Fair market value of all other assets (see instructions)	1c	11,382,026
d	Total (add lines 1a, b, and c)	1d	11,935,640
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) SEE STATEMENT 11	1e	6,251,670
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	11,935,640
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	179,035
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	11,756,605
6	Minimum investment return. Enter 5% of line 5	6	587,830

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	587,830
2a	Tax on investment income for 2015 from Part VI, line 5	2a	9,158
b	Income tax for 2015 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	9,158
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	578,672
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	578,672
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	578,672

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	372,466
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	372,466
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	372,466

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				578,672
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	83,603			
b From 2011	194,543			
c From 2012	169,293			
d From 2013				
e From 2014				
f Total of lines 3a through e	447,439			
4 Qualifying distributions for 2015 from Part XII, line 4 ▶ \$ 372,466				
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)				
d Applied to 2015 distributable amount				372,466
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2015 (If an amount appears in column (d), the same amount must be shown in column (a))	206,206			206,206
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	241,233			
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 2015 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2016				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required—see instructions)				
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	241,233			
10 Analysis of line 9				
a Excess from 2011	71,940			
b Excess from 2012	169,293			
c Excess from 2013				
d Excess from 2014				
e Excess from 2015				

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 foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			(e) Total
	(a) 2015	(b) 2014	(c) 2013	(d) 2012	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
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 foundation 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))
SEE STATEMENT 12

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
SEE STATEMENT 13

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 e-mail address of the person to whom applications should be addressed.
N/A

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

c Any submission deadlines.
N/A

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

Form 990-PF (2015) **THE CARL & NANCY GEWIRZ FUND, INC. 52-1387044**Page **11****Part XV** Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year SEE STATEMENT 14				272,937
Total			▶ 3a	272,937
b Approved for future payment N/A				
Total			▶ 3b	

Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

- 1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?
 - a Transfers from the reporting foundation to a noncharitable exempt organization of
 - (1) Cash
 - (2) Other assets
 - b Other transactions
 - (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
 - c Sharing of facilities, equipment, mailing lists, other assets, or paid employees
 - 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.

	Yes	No
1a(1)		X
1a(2)		X
1b(1)		X
1b(2)		X
1b(3)		X
1b(4)		X
1b(5)		X
1b(6)		X
1c		X

[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
N/A		

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.

**Sign
Here**

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

Signature of officer or trustee

Date _____

DIR/PRES
Title

Paid
Preparer
Use Only

Print/Type preparer's name _____

Preparer's signature

Date _____

Check ☐ if self-employed

PETER A. WILHELM

10/02/17

Firm's name ▶ **WILHELM & ASSOCIATES, LTD.**

PTIN	P00166531
------	-----------

Firm's address ► 256R N WASHINGTON ST
FALLS CHURCH, VA 22046-4517

Firm's EIN ▶ 54-2008811

Phone no **703-356-5005**

Form 990-PF	Other Notes and Loans Receivable	2015
For calendar year 2015, or tax year beginning 12/01/15 , and ending 11/30/16		
Name THE CARL & NANCY GEWIRZ FUND, INC.		Employer Identification Number 52-1387044

FORM 990-PF, PART II, LINE 7 - ADDITIONAL INFORMATION

Name of borrower	Relationship to disqualified person
(1) JOHN HOSKINSON	NONE
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
(10)	

Original amount borrowed	Date of loan	Maturity date	Repayment terms	Interest rate
(1) 1,255,000	12/31/02	12/31/27	\$5,888/MO.	1.000
(2)				
(3)				
(4)				
(5)				
(6)				
(7)				
(8)				
(9)				
(10)				

Security provided by borrower	Purpose of loan
(1) 20.33% DORCHESTER HOUSE LP INTEREST	PURCHASE PARTNERSHIP INTEREST
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
(10)	

Consideration furnished by lender	Balance due at beginning of year	Balance due at end of year	Fair market value
(1) 0	606,074	540,864	540,864
(2)			
(3)			
(4)			
(5)			
(6)			
(7)			
(8)			
(9)			
(10)			
Totals	606,074	540,864	540,864

Statement 1 - Form 990-PF, Part I, Line 11 - Other Income

Description	Revenue per Books	Net Investment Income	Adjusted Net Income
OIL & GAS ROYALTIES	73	73	
RENTAL INCOME FROM PASS-THRU	449,201	449,201	
THEFT LOSS RECOVERY, FROM K-1	45,599	45,599	
CREDIT CARD REWARDS	5,396	5,396	
CLASS ACTION SETTLEMENT	46	46	
TOTAL	500,315	500,315	0

Statement 2 - Form 990-PF, Part I, Line 16a - Legal Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
LEGAL	4,395			4,395
TOTAL	4,395	0	0	4,395

Statement 3 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
ACCOUNTING	11,692			11,692
BOOKKEEPING	19,165			19,165
TOTAL	30,857	0	0	30,857

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Statement 4 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
TAXES ON OIL AND GAS INTERESTS	\$ 4	\$ 4	\$	
OTHER TAXES	2	2		
FEDERAL INCOME TAXES	3,315			3,315
DC BIENNIAL REPORT FEE	300			300
TOTAL	\$ 3,621	\$ 6	\$ 0	\$ 3,615

Statement 5 - Form 990-PF, Part I, Line 19 - Depreciation

Date Acquired	Description	Cost Basis	Prior Year Depreciation	Method	Life	Current Year Depreciation	Net Investment Income	Adjusted Net Income
4/13/02	OFFICE FURNITURE	937	\$ 937	200DB	7	\$	\$	\$
7/15/02	COMPUTER	2,809	2,809	200DB	5			
7/15/02	COMPUTER	2,809	2,809	200DB	5			
7/16/02	COMPUTER MONITORS	2,098	2,098	200DB	5			
7/19/02	COMPUTER RELATED EQUIPMENT	523	523	200DB	5			
8/07/02	OFFICE EQUIPMENT	567	567	200DB	7			
8/07/02	COMPUTER PERIPHERALS	755	755	200DB	5			
8/15/02	TELEPHONES	241	241	200DB	7			
8/08/02	SOFTWARE	399	399	S/L	3			
6/16/06	EQUIPMENT	3,180	3,180	200DB	7			
1/18/11	DELL HARD DRIVE	814	814	200DB	5			
1/20/11	SCANNER	565	565	200DB	5			

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Statement 5 - Form 990-PF, Part I, Line 19 - Depreciation (continued)

Date Acquired	Description	Cost Basis	Prior Year Depreciation	Method	Life	Current Year Depreciation	Net Investment Income	Adjusted Net Income
11/22/13	APPLE COMPUTER	\$ 2,315	\$ 1,524	200DB	5	\$ 316	\$ 316	\$
TOTAL		\$ 18,012	\$ 17,221			\$ 316	\$ 316	\$ 0

Statement 6 - Form 990-PF, Part I, Line 23 - Other Expenses

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
EXPENSES	\$	\$	\$	
EXPENSES RELATED TO OIL AND G	4	4		
BANK CHARGES AND CREDIT CARD	126	126		
OFFICE EXPENSE	190			190
COMPUTER EXPENSE	1,907			1,907
DUES	120			120
PUBLICATIONS	359			359
TOTAL	\$ 2,706	\$ 130	\$ 0	\$ 2,576

Statement 7 - Form 990-PF, Part II, Line 13 - Other Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
1620 K STREET ASSOCIATES 52-6097909	\$ 1,277,046	\$ 1,327,480	MARKET	\$ 2,272,000
CHARTER ENTERPRISE LLC	3,030	3,036	MARKET	29,598
DORCHESTER HOUSE ASSOC. LLC	1,826,218	1,818,868	MARKET	5,345,000
DORCHESTER HOUSE INVESTMENT	30,716	39,157	MARKET	43,842
KALORAMA WEST LLC	98,535	-88,787	MARKET	2,028,000
QUEBEC HOUSE ASSOCIATES, LLC	500,544	491,921	MARKET	1,065,000
TOTAL	\$ 3,736,089	\$ 3,591,675		\$ 10,783,440

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Statement 8 - Form 990-PF, Part II, Line 14 - Land, Building, and Equipment

Description	Beginning Net Book	End Cost / Basis	End Accumulated Depreciation	Net FMV
EQUIPMENT AND SOFTWARE	\$ 791	\$ 18,012	\$ 17,537	\$ 475
TOTAL	\$ 791	\$ 18,012	\$ 17,537	\$ 475

Statement 9 - Form 990-PF, Part II, Line 15 - Other Assets

Description	Beginning of Year	End of Year	Fair Market Value
DEPOSITS	\$ 2,400	\$ 2,400	\$ 2,400
TOTAL	\$ 2,400	\$ 2,400	\$ 2,400

Statement 10 - Form 990-PF, Part II, Line 22 - Other Liabilities

Description	Beginning of Year	End of Year
CREDIT CARD PAYABLE	\$ 22,500	\$ 2,854
DEFERRED COMP PAYABLE		998
PAYROLL TAXES PAYABLE		727
TOTAL	\$ 22,500	\$ 4,579

Statement 11 - Form 990-PF, Part X, Line 1e - Reduction Claimed for Blockage Information**Description**

THE FUND OWNS A MINORITY INTEREST IN SEVERAL REAL ESTATE PARTNERSHIPS OR LLCs. A DISCOUNT FOR BLOCKAGE AND MINORITY INTEREST HAS BEEN USED. THE PERCENTAGES APPLIED TO THE VARIOUS ENTITIES RANGE FROM 36% TO 40% PER THE VALUATIONS PERFORMED BY VALUATION SERVICES, INC. IN 2014.

Statement 12 - Form 990-PF, Part XV, Line 1a - Managers Who Contributed Over 2% or \$5,000

Name of Manager	Amount
CARL GEWIRZ	\$
NANCY GEWIRZ	
TOTAL	\$ 0

Statement 13 - Form 990-PF, Part XV, Line 1b - Managers Who Own 10% or More Stock

Name of Manager	Amount
CARL GEWIRZ	\$
NANCY GEWIRZ	
TOTAL	\$ 0

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Statement 14 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the
Year

Name	Address	Relationship	Status	Purpose	Amount
A SAFE PLACE	24 AMELIA DRIVE	NONE	501(C) (3)	PROMOTE DOMESTIC VIOLENCE REDUCTION.	150
ADAS ISRAEL CONGREGATION	NANTUCKET MA 02554	NONE	501(C) (3)	PROMOTE DOMESTIC VIOLENCE REDUCTION.	150
WASHINGTON DC 20015	2850 QUEBEC STREET NW	NONE	501(C) (3)	MORRIS HARTON SENIOR PROGRAM FUND	500
ALL. FOR NANTUCKET (SAVE OUR SOUND)	4 BARNSTABLE RD	NONE	501(C) (3)	L-T PRESERVATION OF NANTUCKET SOUND	2,500
HYANNIS MA 02601	8633 COLESVILLE ROAD	NONE	501(C) (3)	PROMOTION OF THE ARTS	
AMERICAN FILM INSTITUTE	5100 WISCONSIN AVE NW	NONE	501(C) (3)	SUPPORT HEBREW UNIV IN JERUSALEM	500
SILVER SPRING MD 20910	7272 GREENVILLE AVENUE	NONE	501(C) (3)	PROMOTE RESEARCH	
AMERICAN FRIENDS OF HEBREW UNIV.	2025 E STREET NW	NONE	501(C) (3)	ASSIST IN DISASTER AREAS	150
WASHINGTON DC 20016	4400 MASSACHUSETTS AVE N	NONE	501(C) (3)	JEWISH STUDIES PROGRAM	1,000
AMERICAN HEART ASSOCIATION	1100 CONNECTICUT AVE NW	NONE	501(C) (3)	PROMOTE HUMAN RIGHTS ISSUES	1,000
DALLAS TX 75231	211 NORTH 12TH ST	NONE	501(C) (3)	PROMOTE CONSERVATION, PLANTING TREES	25
AMERICAN RED CROSS	PO BOX 42722	NONE	501(C) (3)	PROMOTION OF THE ARTS	
WASHINGTON DC 20006	BOX 1104	NONE	501(C) (3)	PROMOTION OF THE ARTS	
AMERICAN UNIVERSITY	5020 BATTERY LANE	NONE	501(C) (3)	SUPPORT EMERGENCY MEDICAL SERVICES	
WASHINGTON DC 20016	6600 WISCONSIN AVE	NONE	501(C) (3)	SUPPORT FIREFIGHTERS	
ANTI-DEFAMATION LEAGUE	HANSCOM AFB, ROBINS ST,	NONE	501(C) (3)	SUPPORT CRITICAL CARE TRANSPORT	
WASHINGTON DC 20036	200 EASTERN PKWY	NONE	501(C) (3)	PROMOTION OF THE ARTS	90
ARBOR DAY FOUNDATION	10601 FALLS ROAD	NONE	501(C) (3)	PROMOTE EDUCATION	
LINCOLN NE 68508	6 HERNDAN AVE	NONE	501(C) (3)	PROMOTE CONSERVATION AND EDUC OF BAY	150
ART DECO SOCIETY	ANNAPOLIS MD 21403	NONE	501(C) (3)		
WASHINGTON DC 20015					
ARTISTS ASSOC OF NANTUCKET					
NANTUCKET MA 02554					
BETHESDA CHEVY CHASE RESCUE SQUAD					
BETHESDA MD 20814					
BETHESDA FIRE DEPARTMENT					
CHEVY CHASE MD 20815					
BOSTON MED FLIGHT					
BEDFORD MA 01730					
BROOKLYN MUSEUM					
BROOKLYN NY 11238					
BULLIS SCHOOL					
POTOMAC MD 20854					
CHESAPEAKE BAY FOUNDATION					
ANNAPOLIS MD 21403					

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Statement 14 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the
Year (continued)

Name	Address	Relationship	Status	Purpose	Amount
CHILDRENS NATIONAL MEDICAL CENTER WASHINGTON DC 20010	NONE	111 MICHIGAN AVE NW	501(C) (3)	SUPPORT EDITH HARITON LIBRARY	500
CHURCH OF SAINT PATRICK ROCKVILLE MD 20852	NONE	4101 NORBECK ROAD	501(C) (3)	SUPPORT WORKS OF RELIGIOUS CONG.	
CLEVELAND CLINIC CLEVELAND OH 44195	NONE	9500 EUCLID AVENUE	501(C) (3)	PROMOTE MEDICAL RESEARCH	500
COAST GUARD FOUNDATION STOWINGTON CT 06378	NONE	394 TAUGWONK RD	501(C) (3)	SUPPORT US COAST GUARD AND FAMILIES	
COLUMBIA UNIVERSITY MEDICAL CNETER NEW YORK NY 10032	NONE	722 W 168TH ST 4TH FLOOR	501(C) (3)	MEDICAL RESEARCH AND EDUCATION	
CONGREGATION SHIRAT HA YAM NANTUCKET MA 02554	NONE	PO BOX 1145	501(C) (3)	SUPPORT WORKS OF JEWISH CONGREGATION	2,000
CORCORAN GALLERY OF ART WASHINGTON DC 20006	NONE	500 SEVENTEENTH ST NW	501(C) (3)	PROMOTION OF THE ARTS	
DANA -FARBER CANCER INSTITUTE BOSTON MA 02215	NONE	450 BROOKLINE AVE	501(C) (3)	MELANOMA CANCER RESEARCH	33,333
EGAN MARITIME INSTITUTE NANTUCKET MA 02554	NONE	4 WINTER STREET	501(C) (3)	PROMOTE EDUC OF NANTUCKET'S HISTORY	200
FOOD AND FRIENDS WASHINGTON DC 20011	NONE	219 RIGGS ROAD NE	501(C) (3)	PROVIDE FOOD TO AT RISK POPULATION	
FRATERNAL ORDER OF POLICE-MD LODGE BALTIMORE MD 21222	NONE	1506 LESLIE RD	501(C) (3)	SUPPORT LAW ENFORCEMENT	25
GEORGE WASHINGTON UNIVERSITY WASHINGTON DC 20037	NONE	2300 H ST NW	501(C) (3)	REBELLIOUS SOUL EXHIBITION	
GEORGE WASHINGTON'S MOUNT VERNON MT. VERNON VA 22116	NONE	PO BOX 240	501(C) (3)	SUPPORT LIBRARY FOR STUDY OF G WASH.	100
GIFFORD MEDICAL BERLIN VT 05602	NONE	82 EAST VIEW LANE	501(C) (3)	SUPPORT MEDICAL SERVICES	
GUGGENHEIM MUSEUM NEW YORK NY 10128	NONE	1071 5TH ST.	501(C) (3)	PROMOTION OF THE ARTS	257
HAMLIN EDUCATION CENTER HAYTI SD 57241	NONE	44577 188TH ST	501(C) (3)	SUPPORT EDUCATION	200
HEBREW HOME OF GREATER WASHINGTON ROCKVILLE MD 20852	NONE	6121 MONTROSE ROAD	501(C) (3)	PROVIDE CARE FOR THE ELDERLY	
HILLEL AT GWU WASHINGTON DC 20001	NONE	800 8TH ST NW	501(C) (3)	PROMOTE JEWISH COMM ON COLLEGE CAMPUS	10,000

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Statement 14 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the
Year (continued)

Name	Address	Relationship	Status	Purpose	Amount
HILLEL OF GREATER WASHINGTON	12230 WILKINS AVE	NONE	501(C) (3)	PROMOTE JEWISH LIFE ON CAMPUS	
ROCKVILLE MD 20852	215 S 39TH ST	NONE	501(C) (3)	PROMOTE JEWISH COMM ON COLLEGE CAMPUS	250
HILLEL UNIV OF PENNSYLVANIA	100 RAOUL WALLENBERG PL	NONE	501(C) (3)	PROMOTE EDUCATION ABOUT HOLOCAUST	
PHILADELPHIA PA 19104	5 THOMAS CIRCLE NW	NONE	501(C) (3)	CARE OF INDIGENT AND ABUSED WOMEN	
HOLOCAUST MEMORIAL MUSEUM	1309 LAMBERTON DR. STE G1	NONE	501(C) (3)	HOUSING FOR PERSONS W/ PSYCH. DIS.	100
WASHINGTON DC 20024	4405 E WEST HWY #510	NONE	501(C) (3)	SUPPORT ART EXHIBITIONS	10,000
HOUSE OF RUTH	6125 MONTROSE RD	NONE	501(C) (3)	PROVIDE SOC/REC/CULTURAL ACTIVITIES	200
WASHINGTON DC 20005	12320 PARKLAWN DR.	NONE	501(C) (3)	PROVIDE ASSISTANCE TO THE ELDERLY	250
HOUSING UNLIMITED INC.	6101 MONTROSE RD	NONE	501(C) (3)	PROMOTE SOCL/REL/EDUC OPPORTUNITIES	15,000
SILVER SPRING MD 20902	600 I STREET NW	NONE	501(C) (3)	PROMOTE RELIGIOUS HISTORY	2,800
JAMES RENWICK ALLIANCE	78 RANDALL AVE	NONE	501(C) (3)	PROMOTE EDUCATION ABOUT ISRAEL	250
BETHESDA MD 20814	6123 MONTROSE RD	NONE	501(C) (3)	PROVIDE SOCIAL SERVICES	
JEWISH COMM CENTER OF GREATER WASH	2700 F ST NW	NONE	501(C) (3)	PROMOTION OF THE ARTS	69,138
ROCKVILLE MD 20852	1803 E MONUMENT ST 5TH FL	NONE	501(C) (3)	WILMER EYE	10,000
JEWISH COUNCIL FOR THE AGING	6917 ARLINGTON RD STE 352	NONE	501(C) (3)	RESEARCH AND ED. FOR LUNG CANCER	
ROCKVILLE MD 20852	10755 FALLS RD, STE 200	NONE	501(C) (3)	PROMOTE RESEARCH	
JEWISH HISTORICAL SOCIETY	1275 MAMARONECK AVE	NONE	501(C) (3)	PROMOTE RESEARCH	
WASHINGTON DC 20001	4 VESTAL ST	NONE	501(C) (3)	PRESERVE LEGACY OF MARIA MITCHELL	
JEWISH NATIONAL FUND					
ROCKVILLE CENTER NY 11570					
JEWISH SOCIAL SERVICE AGENCY					
ROCKVILLE MD 20852					
JOHN F KENNEDY CENTER					
WASHINGTON DC 20566					
JOHNS HOPKINS UNIVERSITY					
BALTIMORE MD 21215					
LUNGEVITY FOUNDATION					
BETHESDA MD 20814					
LYMEMD					
LUTHERVILLE MD 21093					
MARCH OF DIMES					
WHITE PLAINS NY 10605					
MARIA MITCHELL ASSOCIATION					
NANTUCKET MA 02554					

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**Statement 14 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the
Year (continued)**

Name	Address	Relationship	Status	Purpose	Amount
MARYLAND PUBLIC TELEVISION	OWINGS MILLS MD 21117	NONE	11767 OWINGS MILLS BLVD 501(C) (3)	SUPPORT EDUCATIONAL OFFERINGS	100
MAYO CLINIC		NONE	200 FIRST ST SW 501(C) (3)	PROMOTE MEDICAL RESEARCH	200
MEMORIAL SLOAN-KETTERING CANCER	ROCHESTER MN 55905	NONE	1275 YORK AVE 501(C) (3)	PROMOTE CANCER RESEARCH	250
METROPOLITAN MUSEUM OF ART	NEW YORK NY 10065	NONE	1000 FIFTH AVE 501(C) (3)	PROMOTE THE ARTS	2,248
MILITARY ORDER OF PURPLE HEART	NEW YORK NY 10028	NONE	7008 LITTLE RIVER TURNPIK 501(C) (3)	PROVIDE ASSISTANCE TO VETERANS	
MUSEUM OF MODERN ART	ANNANDALE VA 22003	NONE	11 WEST 53RD ST 501(C) (3)	PROMOTE THE ARTS	
NEW YORK NY 10019		NONE	1 INDIA ST 501(C) (3)	SUPPORT PUBLIC LIBRARY	250
NANTUCKET ATHENEUM	NANTUCKET MA 02554	NONE	PO BOX 269 501(C) (3)	SUPPORT PROGRAMS FOR YOUTH	
NANTUCKET BOYS & GIRLS CLUB	NANTUCKET MA 02554	NONE	118 CLIFF ROAD 501(C) (3)	PROMOTE CONSERV OF NATURAL HABITATS	
NANTUCKET CONSERVATION FOUNDATION	NANTUCKET MA 02554	NONE	57 PROSPECT ST 501(C) (3)	SUPPORT HOSPITALS ABILITY TO PROV SV	1,000
NANTUCKET COTTAGE HOSPITAL	NANTUCKET MA 02554	NONE	17 SOUTH WATER ST 501(C) (3)	PROMOTION OF THE THEATER ARTS	
NANTUCKET DREAMLAND FOUNDATION	NANTUCKET MA 02554	NONE	131 PLEASANT ST 501(C) (3)	SUPPORT FIRE FIGHTERS	365
NANTUCKET FIREMAN'S ASSOC	NANTUCKET MA 02554	NONE	PO BOX 1016 501(C) (3)	PROMOTE EDUC OF NANTUCKET'S HISTORY	500
NANTUCKET HISTORICAL ASSOC	NANTUCKET MA 02554	NONE	6 ASH LANE 501(C) (3)	PROTECT NANTUCKET'S NATURAL WORLD	250
NANTUCKET LAND COUNCIL	NANTUCKET MA 02554	NONE	1 RUGGED ROAD 501(C) (3)	PROMOTE AND PROVIDE EDUCATION	
NANTUCKET LIGHTHOUSE SCHOOL	NANTUCKET MA 02554	NONE	49 UNION ST 501(C) (3)	PROMOTION OF THE ARTS	150
NANTUCKET LIGHTSHIP BASKET MUSEUM	NANTUCKET MA 02554	NONE	1785 MASSACHUSETTS AVE 501(C) (3)	PROMOTE EDUC OF SAVING HIST PLACES	15
NAT'L TR FOR HISTORIC PRESERVATION	WASHINGTON DC 20036	NONE	INDEP AVE & 6TH ST SW 501(C) (3)	PROMOTE EDUC ABOUT AIR & SPACE EXPLO	
NATIONAL AIR & SPACE	WASHINGTON DC 20013	NONE			

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**Statement 14 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the
Year (continued)**

Name		Address		Relationship		Status	Purpose	Amount
NATIONAL BRAIN TUMOR SOCIETY NEWTON MA 02458		55 CHAPEL STREET, STE 200		NONE		501(C) (3)	BRAIN CANCER RESEARCH	
NATIONAL BUILDING MUSEUM WASHINGTON DC 20001		401 F ST NW		NONE		501(C) (3)	PROMOTION OF THE ARTS	480
NATIONAL GALLERY OF ART LANDOVER MD 20785		2000B SOUTH CLUB DR		NONE		501(C) (3)	PROMOTION OF THE ARTS	19,720
NATIONAL MUSEUM AMERICAN INDIAN WASHINGTON DC 20090		PO BOX 96836		NONE		501(C) (3)	PROMOTE EDUC OF AMERICAN INDIAN	86
NATIONAL MUSEUM OF WOMEN IN ARTS WASHINGTON DC 20005		1250 NEW YORK AVE NW		NONE		501(C) (3)	PROMOTION OF THE ARTS	95
NATIONAL WWII MUSEUM NEW ORLEANS LA 70130		945 MAGAZINE ST		NONE		501(C) (3)	PROMOTE WWII EDUCATION	
NEW SCHOOL UNIVERSITY (PARSONS) NEW YORK NY 10011		72 FIFTH AVE, 3RD FLOOR		NONE		501(C) (3)	PROMOTE EDUCATION FOR DESIGN	
NEWTON-WELLESLEY HOSPITAL FOUNDATIO NEWTON MA 02462		2014 WASHINGTON ST		NONE		501(C) (3)	SUPPORT MEDICAL SERVICES	
OHEV SHOLOM-NATL SYNAGOGUE WASHINGTON DC 20012		1600 JONQUIL ST NW		NONE		501(C) (3)	SUPPORT WORKS OF JEWISH CONGREGATION	
PHILLIPS COLLECTION WASHINGTON DC 20009		1600 21ST ST NW		NONE		501(C) (3)	SUPPORT FUNDRAISING EVENT	
PROJECT HOPE MILLWOOD VA 22646		255 CARTER HALL LANE		NONE		501(C) (3)	LASTING SOLUTIONS TO HEALTH PROBLEMS	
PULMINARY FIBROSIS FOUNDATION CHICAGO IL 60642		811 W. EVERGREEN AVE		NONE		501(C) (3)	SUPPORT MEDICAL RESEARCH	
SALVATION ARMY ALEXANDRIA VA 22313		615 SLATERS LANE		NONE		501(C) (3)	SOCIAL SUPPORT TO INDIGENT & AT RISK	
SIBLEY MEMORIAL HOSPITAL WASHINGTON DC 20016		5255 LAUGHBORO RD NW		NONE		501(C) (3)	CANCER RESEARCH - DR KESSLER	10,000
SMALL FRIENDS OF NANTUCKET NANTUCKET MA 02554		19 NOBADEER FARM RD		NONE		501(C) (3)	PROVIDE EARLY EDUC AND CHILDCARE	
SMITHSONIAN CONTRIBUTING MEMBER WASHINGTON DC 20013		PO BOX 37012		NONE		501(C) (3)	PROMOTE ARTS AND EDUCATION	834
SMITHSONIAN HIRSHHORN MUSEUM WASHINGTON DC 20560		700 INDEPENDENCE AVE. SW		NONE		501(C) (3)	PROMOTION OF THE ARTS	2,205
SO OTHERS MIGHT EAT WASHINGTON DC 20001		60 O ST NW		NONE		501(C) (3)	CLOTHING FOOD & HEALTHCARE FOR POOR	

Federal Statements

Statement 14 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the
Year (continued)

Name	Address	Relationship	Status	Purpose	Amount
SUBURBAN HOSPITAL	8600 OLD GEORGETOWN RD	NONE	501(C) (3)	DONATION FOR NURSING CARE SERVICES	1,000
BETHESDA MD 20814	13300 ARCTIC AVENUE	NONE	501(C) (3)	PROMOTE JEWISH EDUCATION	
SULAM INC	5005 LBJ FREEWAY STE 250	NONE	501(C) (3)	PROMOTE MEDICAL RESEARCH	
ROCKVILLE MD 20853	PO BOX 35	NONE	501(C) (3)	HONOR AND EDUCATE ABOUT D EISENHOWER	
SUSAN KOMEN FOUNDATION	2320 S ST NW	NONE	501(C) (3)	PROMOTION OF THE ARTS	9,710
DALLAS TX 75244	99 GANSEVOORT ST	NONE	501(C) (3)	PROMOTE THE ARTS	175
THE EISENHOWER FOUNDATION	PO BOX 96475	NONE	501(C) (3)	SUPPORT RENEWING AND IMPROVING MALL	
ABILENE KS 67410	419 BOSTON AVE	NONE	501(C) (3)	PROMOTE AND PROVIDE EDUCATION	1,000
THE TEXTILE MUSEUM	PO BOX 15119	NONE	501(C) (3)	SUPPORT US OLYMPIC ATHLETES	
WASHINGTON DC 20008	3451 WALNUT ST	NONE	501(C) (3)	ABRAMS CANCER CENTER	500
THE WHITNEY MUSEUM	3451 WALNUT ST	NONE	501(C) (3)	SUPPORT ALUMNI MAGAZINE	
NEW YORK NY 10014	245 FIRST ST SW	NONE	501(C) (3)	PROMOTE EDUC OF IMPORT OF PLANTS	250
TRUST FOR THE NATIONAL MALL	PO BOX 668	NONE	501(C) (3)	SUPPORT AMATEUR ATHLETES	2,000
WASHINGTON DC 20090	PO BOX 96860	NONE	501(C) (3)	SUPPORT AID TO US TROOPS &FAMILIES	
TUFTS UNIVERSITY	3935 MACOMB STREET NW	NONE	501(C) (3)	SUPPORT WORKS OF JEWISH CONGREGATION	7,651
MEDFORD MA 02155	110 IRVING ST NW	NONE	501(C) (3)	PHYSICIAN'S LOUNGE-MEDSTAR HEART	30,000
UNITED STATES OLYMPIC COMMITTEE	501(C) (3)	NONE	501(C) (3)	SUPPORT MEDICAL RESEARCH	20,000
COLORADO SPRINGS CO 80903	PO BOX 96100	NONE	501(C) (3)	PROMOTE EDUC AND ARTS PROGRAMMING	240
UNIVERSITY OF PENNSYLVANIA					
PHILADELPHIA PA 19104					
UNIVERSITY OF PENNSYLVANIA					
PHILADELPHIA PA 19104					
US BOTANIC GARDEN					
WASHINGTON DC 20024					
USA POWERLIFTING					
COLUMBIA CITY IN 46725					
USO					
WASHINGTON DC 20090					
WASHINGTON HEBREW CONGREGATION					
WASHINGTON DC 20016					
WASHINGTON HOSPITAL CENTER FDN					
WASHINGTON DC 20010					
WASHINGTON HOSPITAL CENTER FDN					
WASHINGTON DC 20010					
WETA					
WASHINGTON DC 20090					

**Statement 14 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the
Year (continued)**

Name		Address		Relationship	Status	Purpose	Amount
Address							
WOODS HOLE RESEARCH	FALMOUTH MA 02540	NONE	149 WOODS HOLD RD	501(C) (3)	PROMOTE SCIENCE, ED, FOR PLANET		
ZETA BETA TAU FOUNDATION	INDIANAPOLIS IN 46268	NONE	3905 VINCENNES RD	501(C) (3)	PROMOTION OF EDUCATION		250
NORTON MUSEUM OF ART	WEST PALM BEACH FL 33401	NONE	1451 S OLIVE AVE	501(C) (3)	PROMOTE THE ARTS		125
REALTOR UNIVERSITY	CHICAGO IL 60611	NONE	430 N. MICHIGAN AVE 6 FL	501(C) (3)	SCHOLARSHIP FUND		120
TOTAL							272,937

Statement 15 - Form 990-PF, Part XVI-A, Line 11 - Other Revenue

<u>Description</u>	<u>Business Code</u>	<u>Unrelated Amount</u>	<u>Exclusion Code</u>	<u>Exclusion Amount</u>	<u>Related Income</u>
OIL & GAS ROYALTIES		\$	15	\$ 73	\$
RENTAL INCOME FROM PASS-THR			16	449,201	
THEFT LOSS RECOVERY, FROM K			16	45,599	
CREDIT CARD REWARDS			14	5,396	
CLASS ACTION SETTLEMENT			14	46	
TOTAL		\$ <u>0</u>		\$ <u>500,315</u>	\$ <u>0</u>

Form 990-PF - General Footnote**Description**

THE VALUES SHOWN IN STATEMENT 7 FOR PART II, LINE 13, REFLECT ESTIMATED VALUES FOR CHARTER ENTERPRISES, LLC AND DORCHESTER HOUSE ASSOCIATES, LLC BECAUSE THE ENTITY VALUES ARE TOO SMALL TO WARRANT THE COST OF A VALUATION. DORCHESTER HOUSE ASSOCIATES, LLC HOLD CLAIMS FOR REFUND OF MADOFF LOSSES WHICH ARE MINIMAL. CHARTER ENTERPRISES, LLC IS A VERY SMALL HOLDING OF 0.25%.

The Carl & Nancy Gewirz Fund, Inc.
7117 Glenbrook Road
Bethesda, MD 20814-1224

Section 1.263(a)-1(f) De Minimis Safe Harbor Election

Under Regulation 1.263(a)-1(f), the taxpayer hereby elects to apply the de minimis safe harbor election to all qualifying property placed in service during the tax year.