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Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶ 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

2016

Open to Public Inspection

For calendar year 2016, or tax year beginning 01-01-2016 , and ending 12-31-2016

Name of foundation
Jim Neuberger and Helen Stambler Neuberger Foundation
% Foundation Source

Number and street (or P O box number if mail is not delivered to street address) Room/suite
55 walls drive 3rd fl

City or town, state or province, country, and ZIP or foreign postal code
fairfield, CT 06824

A Employer identification number
13-6066102

B Telephone number (see instructions)
(800) 839-1754

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 ▶ ☐

G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

H Check type of organization ☑ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year *(from Part II, col (c), line 16)*▶$ 4,763,156

J Accounting method ☑ Cash ☐ Accrual ☐ Other (specify)
(Part I, column (d) must be on cash basis)

Part I **Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))*

			(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)	0			
	2	Check ▶ ☑ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments	630	630		
	4	Dividends and interest from securities	45,574	45,574		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	296,922			
	b	Gross sales price for all assets on line 6a 2,379,925				
	7	Capital gain net income (from Part IV, line 2)		296,922		
	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)	418	418		
	12	**Total.** Add lines 1 through 11	343,544	343,544		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	0			
	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)	37,362	37,362		
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	6,214	853		
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)	23,894	25		23,869
	24	**Total operating and administrative expenses.** Add lines 13 through 23	67,470	38,240		23,869
	25	Contributions, gifts, grants paid	195,800			195,800
	26	**Total expenses and disbursements.** Add lines 24 and 25	263,270	38,240		219,669
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	80,274			
	b	**Net investment income** (if negative, enter -0-)		305,304		
	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			
	2	Savings and temporary cash investments	134,332	200,261	200,261
	3	Accounts receivable ▶ 1,258			
		Less allowance for doubtful accounts ▶		1,258	1,258
	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)	9,886	77,555	77,632
	b	Investments—corporate stock (attach schedule)	2,326,833	2,525,325	3,297,014
	c	Investments—corporate bonds (attach schedule)	1,460,808	1,207,734	1,186,991
	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)	3,931,859	4,012,133	4,763,156
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			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	3,931,859	4,012,133	
	30	**Total net assets or fund balances** (see instructions)	3,931,859	4,012,133	
	31	**Total liabilities and net assets/fund balances** (see instructions)	3,931,859	4,012,133	

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	3,931,859
2	Enter amount from Part I, line 27a	2	80,274
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	4,012,133
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	4,012,133

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)
1 a	Publicly-traded Securities			
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	2,379,925		2,083,003	296,922
b				
c				
d				
e				

	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	
a				296,922
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	296,922
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))
2015	268,064	4,792,362	0 055936
2014	266,183	4,945,584	0 053822
2013	332,123	4,721,497	0 070343
2012	4,863,471	4,484,547	1 084495
2011	1,164,731	11,069,241	0 105222

2	**Total** of line 1, column (d)	2	1 369818
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 273964
4	Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	4,600,114
5	Multiply line 4 by line 3	5	1,260,266
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	3,053
7	Add lines 5 and 6	7	1,263,319
8	Enter qualifying distributions from Part XII, line 4	8	219,669

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	6,106
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	6,106
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	6,106
6	Credits/Payments				
a	2016 estimated tax payments and 2015 overpayment credited to 2016	6a	5,071		
b	Exempt foreign organizations—tax withheld at source	6b			
c	Tax paid with application for extension of time to file (Form 8868)	6c	1,035		
d	Backup withholding erroneously withheld	6d			
7	Total credits and payments Add lines 6a through 6d			7	6,106
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	
11	Enter the amount of line 10 to be **Credited to 2017 estimated tax** ▶	**Refunded** ▶		11	

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)?	1b		No
	*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*			
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		
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) ▶NY			
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 2016 or the taxable year beginning in 2016 (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)

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		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?	13	Yes	

Website address ▶

14 The books are in care of ▶Foundation Source Telephone no ▶(800) 839-1754

Located at ▶501 Silverside Road Suite 123 Wilmington DE ZIP+4 ▶198091377

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 |

			Yes	No
16	At any time during calendar year 2016, 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?	16		No
	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 ▶			

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

			Yes	No
	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)			
	(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)?	1b		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
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 2016?	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 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016? ☐ 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 2016 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 2016).*	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 2016?	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	**(e)** Expense account, other allowances
Jim Kaufman 55 walls drive 3rd fl fairfield, CT 06824	Dir 1 0	0	0	0
Jim Neuberger 55 walls drive 3rd fl fairfield, CT 06824	Pres / Dir 1 0	0	0	0
Helen Stambler Neuberger 55 walls drive 3rd fl fairfield, CT 06824	VP / Dir / Sec 1 0	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	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances

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
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	4,390,275
b	Average of monthly cash balances	1b	279,891
c	Fair market value of all other assets (see instructions)	1c	0
d	**Total** (add lines 1a, b, and c)	1d	4,670,166
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) — 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	4,670,166
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	70,052
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	4,600,114
6	**Minimum investment return.** Enter 5% of line 5	6	230,006

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	230,006
2a	Tax on investment income for 2016 from Part VI, line 5	2a	6,106		
b	Income tax for 2016 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	6,106
3	Distributable amount before adjustments Subtract line 2c from line 1			3	223,900
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	223,900
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	223,900

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	219,669
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	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	0
b	Cash distribution test (attach the required schedule)	3b	0
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	219,669
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions)	5	
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	219,669

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 2015	(c) 2015	(d) 2016
1 Distributable amount for 2016 from Part XI, line 7					223,900
2 Undistributed income, if any, as of the end of 2016					
a Enter amount for 2015 only.					
b Total for prior years 2014 , 2013 , 2012					
3 Excess distributions carryover, if any, to 2016					
a From 2011.	621,855				
b From 2012.	4,649,078				
c From 2013.	104,294				
d From 2014.	27,450				
e From 2015.	35,335				
f **Total** of lines 3a through e.		5,438,012			
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ $ 219,669					
a Applied to 2015, 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 2016 distributable amount.					219,669
e Remaining amount distributed out of corpus		0			
5 Excess distributions carryover applied to 2016 *(If an amount appears in column (d), the same amount must be shown in column (a))*		4,231			4,231
6 **Enter the net total of each column as indicated below:**					
a Corpus Add lines 3f, 4c, and 4e Subtract line 5		5,433,781			
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 2015 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 2017					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 2011 not applied on line 5 or line 7 (see instructions) . . .		617,624			
9 **Excess distributions carryover to 2017.** Subtract lines 7 and 8 from line 6a		4,816,157			
10 Analysis of line 9					
a Excess from 2012. . . .	4,649,078				
b Excess from 2013. . . .	104,294				
c Excess from 2014. . . .	27,450				
d Excess from 2015. . . .	35,335				
e Excess from 2016. . . .					

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 2016, 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)

	Tax year	Prior 3 years			(e) Total
	(a) 2016	**(b)** 2015	**(c)** 2014	**(d)** 2013	
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 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))

JIM NEUBERGER

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

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 Additional Data Table				
Total . . . . ▶ **3a**				195,800
b *Approved for future payment*				
Total . . . . ▶ **3b**				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments. . . .					
3 Interest on savings and temporary cash investments			14	630	
4 Dividends and interest from securities. . . .			14	45,574	
5 Net rental income or (loss) from real estate					
a Debt-financed property.					
b Not debt-financed property.					
6 Net rental income or (loss) from personal property					
7 Other investment income.					
8 Gain or (loss) from sales of assets other than inventory			18	296,922	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue					
a BANK CHARGE REFUND			01	418	
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e). .				343,544	

13 **Total.** Add line 12, columns (b), (d), and (e). 13 343,544

(See worksheet in line 13 instructions to verify calculations)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)

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

		Yes	No
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.	**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

(a) Line No	**(b)** Amount involved	**(c)** Name of noncharitable exempt organization	**(d)** Description of transfers, transactions, and sharing arrangements

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

******	2017-05-09	******	May the IRS discuss this return with the preparer shown below (see instr)? ☑ **Yes** ☐ **No**
Signature of officer or trustee	Date	Title	

Paid Preparer Use Only

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ▶ ☐	PTIN
Jeffrey D Haskell				P01345770
Firm's name ▶ Foundation Source				Firm's EIN ▶
Firm's address ▶ One Hollow Ln Ste 212 Lake Success, NY 11042				Phone no (800) 839-1754

Form 990PF Part XV Line 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*				
ACTION AGAINST HUNGER USA ONE WHITEHALL ST 2ND FL NEW YORK, NY 10004	N/A	PC	General & Unrestricted	1,000
ACTORS COMPANY THEATRE INC 900 BROADWAY STE 905 NEW YORK, NY 10003	N/A	PC	General & Unrestricted	1,000
AMERICAN CANCER SOCIETY 132 W 32ND ST NEW YORK, NY 10001	N/A	PC	DANCE AGAINST CANCER Project	1,000
AMERICAN CIVIL LIBERTIES UNION FOUNDATION INC 125 BROAD ST 18TH FL NEW YORK, NY 10004	N/A	PC	General & Unrestricted	1,000
AMNESTY INTERNATIONAL OF THE USA INC 5 PENN PLZ 16TH FL NEW YORK, NY 10001	N/A	PC	General & Unrestricted	500
BANK STREET COLLEGE OF EDUCATION 610 W 112TH ST NEW YORK, NY 10025	N/A	PC	General & Unrestricted	1,000
BARNES FOUNDATION 2025 BENJAMIN FRANKLIN PKWY PHILADELPHIA, PA 19130	N/A	PC	CIRCLES Program	2,500
BROADWAY MALL ASSOCIATION INC 2095 BROADWAY STE 403 NEW YORK, NY 10023	N/A	PC	General & Unrestricted	1,000
BROWN UNIVERSITY Annual Fund BOX 1976 PROVIDENCE, RI 02912	N/A	PC	General & Unrestricted	500
CHAMBER MUSIC CONFERENCE 70 RIDGE HILL RD SUDBURY, MA 01776	N/A	PC	General & Unrestricted	1,000
CITYMEALS-ON-WHEELS 355 LEXINGTON AVE 3RD FL NEW YORK, NY 10017	N/A	PC	General & Unrestricted	500
CYSTIC FIBROSIS FOUNDATION 4929 WILSHIRE BLVD STE 760 LOS ANGELES, CA 90010	N/A	PC	General & Unrestricted	1,000
DOCTORS WITHOUT BORDERS USA INC 333 7TH AVE 2ND FL NEW YORK, NY 10001	N/A	PC	General & Unrestricted	500
ENVIRONMENTAL DEFENSE FUND INCORPORATED 1875 CONNECTICUT AVE NW STE 600 WASHINGTON, DC 20009	N/A	PC	General & Unrestricted	1,000
ETHICAL CULTURE FIELDSTON SCHOOL 33 CENTRAL PARK W NEW YORK, NY 10023	N/A	PC	General & Unrestricted	1,000
Total . . . . ▶ **3a**				195,800

Form 990PF Part XV Line 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*				
FORTUNE SOCIETY INC 29-76 NORTHERN BLVD LONG ISLAND CITY, NY 11101	N/A	PC	General & Unrestricted	1,000
FRIENDS OF THE NEUBERGER MUSEUM INC 735 ANDERSON HILL RD PURCHASE, NY 10577	N/A	PC	General & Unrestricted	22,600
FRIENDS OF THE NEUBERGER MUSEUM INC 735 ANDERSON HILL RD PURCHASE, NY 10577	N/A	PC	HELEN STAMBLER NEUBERGER ACQUISITIONS FUND	100
FRIENDS OF THE NEUBERGER MUSEUM INC 735 ANDERSON HILL RD PURCHASE, NY 10577	N/A	PC	ROY R NEUBERGER EXHIBITION PRIZE 2017 fund	50,000
HOPE & HEROES CHILDRENS CANCER FUND 161 FORT WASHINGTON AVE IRVING PAVI NEW YORK, NY 10032	N/A	PC	General & Unrestricted	1,000
HUNTER COLLEGE FOUNDATION INC 695 PARK AVE E1313 NEW YORK, NY 10065	N/A	PC	General & Unrestricted	1,000
INNOCENCE PROJECT INC 40 WORTH ST RM 701 NEW YORK, NY 10013	N/A	PC	General & Unrestricted	1,000
JEWISH WOMENS FOUNDATION OF NEW YORK INC 130 E 59TH ST NEW YORK, NY 10022	N/A	PC	General & Unrestricted	500
LANDMARK WEST INC LANDMARK W 45 W 67TH ST NEW YORK, NY 10023	N/A	PC	General & Unrestricted	500
LUPUS RESEARCH ALLIANCE INC 28 W 44TH ST STE 501 NEW YORK, NY 10036	N/A	PC	General & Unrestricted	1,000
NATIONAL DANCE INSTITUTE INC 217 W 147TH ST NEW YORK, NY 10039	N/A	PC	General & Unrestricted	44,600
NATIONAL DANCE INSTITUTE INC 217 W 147TH ST NEW YORK, NY 10039	N/A	PC	ADOPT-A-SCHOOL Project	25,000
NATIONAL DANCE INSTITUTE INC 217 W 147TH ST NEW YORK, NY 10039	N/A	PC	Photography of Staff and Board Project	500
NATIONAL DANCE INSTITUTE INC 217 W 147TH ST NEW YORK, NY 10039	N/A	PC	40 FOR 40 ADOPT A CLASS Initiative	10,000
NATIONAL DANCE INSTITUTE INC 217 W 147TH ST NEW YORK, NY 10039	N/A	PC	NEW CHOREOGRAPHY EOY 2016 Initiative	3,500
Total . . . . ▶ **3a**				195,800

Form 990PF Part XV Line 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*				
NATIONAL SCHOOL CLIMATE CENTER 341 W 38TH ST FL 9 NEW YORK, NY 10018	N/A	PC	General & Unrestricted	1,000
NEW YORK PUBLIC RADIO 160 VARICK ST NEW YORK, NY 10013	N/A	PC	General & Unrestricted	1,000
NEW YORK-PRESBYTERIAN FUND INC 654 W 170TH ST NEW YORK, NY 10032	N/A	PC	GoPink Initiative	500
PLANNED PARENTHOOD FEDERATION OF AMERICA INC 123 WILLIAMS ST 10TH FL NEW YORK, NY 10038	N/A	PC	General & Unrestricted	1,000
PUBLIC CITIZEN FOUNDATION INC 1600 20TH ST NW WASHINGTON, DC 20009	N/A	PC	General & Unrestricted	500
SARATOGA SPRINGS PERFORMING ARTS CENTER INC 108 AVE OF THE PINES SARATOGA SPRINGS, NY 12866	N/A	PC	General & Unrestricted	1,000
THE ASSOCIATION FOR FRONTOTEMPORAL DEGENERATION 290 KING OF PRUSSIA RD BLDG 2 RADNOR, PA 19087	N/A	PC	General & Unrestricted	1,000
THE DOOR - A CENTER OF ALTERNATIVES INC 121 AVE OF THE AMERICAS STE 506 NEW YORK, NY 10013	N/A	PC	General & Unrestricted	1,000
TRUSTEES OF COLUMBIA UNIVERSITY IN THE CITY OF NEW 622 W 113TH ST MC4524 NEW YORK, NY 10025	N/A	PC	Double Discovery Center	10,000
VERA INSTITUTE OF JUSTICE INC 233 BROADWAY NEW YORK, NY 10279	N/A	PC	General & Unrestricted	1,000
WNET 825 8TH AVE NEW YORK, NY 10019	N/A	PC	General & Unrestricted	1,000
Total . . . . ▶ 3a				195,800

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TY 2016 Depreciation Schedule

Name: Jim Neuberger and Helen Stambler Neuberger Foundation

EIN: 13-6066102

TY 2016 Investments Corporate Bonds Schedule

Name: Jım Neuberger and Helen Stambler Neuberger Foundatıon

EIN: 13-6066102

Name of Bond	End of Year Book Value	End of Year Fair Market Value
AMERICAN EXPRESS - 2.125% - 07	40,600	40,258
ANHEUSER BUSCH COS INC - 0.050	43,296	42,584
ASTRAZENECA PLC NOTE - 1.750%	40,521	40,071
BARCLAYS BK BOND - 0.019% - 04	50,905	50,654
BERKSHIRE HATHAWAY INC - 2.100	41,093	40,360
BP CAP MKTS P L C SR FLT NT -	25,000	25,004
CATERPILLAR FINL - 5.450% - 04	42,816	41,911
CHARLES SCHWAB CORP - 0.022% -	40,731	40,301
CHEVRON CORP NOTE - 1.344% - 1	40,000	39,978
CISCO SYS INC SR NT - 3.150% -	41,942	40,177
COMMONWEALTH BK AUSTRALIA MTN	40,937	40,462
CONS EDISON CO OF NY NOTES - 5	42,797	42,096
CREDIT SUISSE NEW YORK BRANCH	50,000	49,744
DEUTSCHE BANK AG LONDON BOND -	50,000	49,850
DU PONT E I DE NEMOURS - 6.000	43,707	42,506
DUKE ENERGY CAROLINAS LLC - 0.	42,645	41,801
GOLDMAN SACHS BK BOND - 0.025%	51,388	51,093
HONEYWELL INTL - 0.000% - 10/3	40,000	40,062
JP MORGAN CHASE & CO - 2.200%	40,732	40,161
MIDAMERICAN ENERGY HLDGS NEWSR	65,720	64,119

Name of Bond	End of Year Book Value	End of Year Fair Market Value
NATIONAL RURAL UTILS COOP - 0.	40,693	40,306
ORACLE CORP SR NT - 2.250% - 1	41,154	40,485
PARKER HANNIFIN CORPS - 0.055%	43,111	42,130
PNC BK N A PITTSBURGH - 1.800%	40,260	40,073
UBS AG STAMFORD BRH VR - 0.000	40,000	39,988
UNITED PARCEL SERVICE INC - 0.	40,094	39,983
WAL-MART STORES, INC - 5.375%	43,979	40,438
WYETH - 5.450% - 04/01/2017	43,613	40,396

TY 2016 Investments Corporate Stock Schedule

Name: Jim Neuberger and Helen Stambler Neuberger Foundation

EIN: 13-6066102

Name of Stock	End of Year Book Value	End of Year Fair Market Value
ALLERGAN PLC	107,293	86,104
ALPHABET INC CL C	109,897	119,631
APPLE INC	33,738	112,693
ASML HOLDING NV NY REG SHS	77,410	92,565
BRISTOL-MYERS SQUIBB CO	61,432	81,816
CABOT OIL & GAS CORP	34,823	35,040
CDW CORP	59,308	85,949
CHUBB LIMITED	74,254	89,181
CHURCH & DWIGHT	47,634	68,495
CME GROUP, INC	46,815	72,094
COMCAST CORP	59,598	75,955
COSTCO WHOLESALE CORPORATION	42,492	60,041
CVS CAREMARK CORP	127,861	106,529
DANAHER CORP	29,719	64,218
DENTSPLY SIRONA INC	74,310	90,578
DEVON ENERGY CORPORATION	52,722	91,340
DOVER CORP	62,177	73,057
EDWARDS LIFESCIENCES	64,604	65,590
EOG RESOURCES INC	32,693	101,100
ESTEE LAUDER COMPANIES INC	61,464	66,929
EXPRESS SCRIPTS HOLDING CO	84,938	73,949
FEDEX CORPORATION	105,468	116,374
FIDELITY NATIONAL INFORMATION	87,593	105,896
FISERV INC	11,071	66,425
INTUIT	34,662	60,170
IPG PHOTONICS CORP	76,606	101,178
JOHNSON & JOHNSON	61,820	77,767
JP MORGAN CHASE	77,454	135,906
LENNAR CORP	24,719	60,102
MARRIOTT INTERNATIONAL INC. CL	92,059	107,484

Name of Stock	End of Year Book Value	End of Year Fair Market Value
MOODYS CORP	83,011	98,984
MOTOROLA SOLUTIONS INC	84,316	99,468
NESTLE S.A	30,719	64,566
NIKE INC-CL B	83,904	78,787
RANGE RESOURCES CORP DEL	73,239	43,809
ROPER INDUSTRIES	26,626	100,694
TOLL BROTHERS INC	51,798	55,800
WAL-MART STORES INC	86,906	86,400
WALT DISNEY HOLDINGS CO	17,696	52,110
ZIMMER BIOMET HOLDINGS	70,476	72,240

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TY 2016 Investments Government Obligations Schedule

Name:	Jim Neuberger and Helen Stambler Neuberger Foundation
EIN:	13-6066102
US Government Securities - End of Year Book Value:	77,555
US Government Securities - End of Year Fair Market Value:	77,632
State & Local Government Securities - End of Year Book Value:	
State & Local Government Securities - End of Year Fair Market Value:	

TY 2016 Other Expenses Schedule

Name: Jim Neuberger and Helen Stambler Neuberger Foundation

EIN: 13-6066102

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Administrative Fees	23,619			23,619
Bank Charges	25	25		
State or Local Filing Fees	250			250

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TY 2016 Other Income Schedule

Name: Jim Neuberger and Helen Stambler Neuberger Foundation

EIN: 13-6066102

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
bank charge refund	418	418	

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TY 2016 Other Professional Fees Schedule

Name: Jim Neuberger and Helen Stambler Neuberger Foundation

EIN: 13-6066102

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Investment Management Services	37,362	37,362		

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TY 2016 Taxes Schedule

Name: Jim Neuberger and Helen Stambler Neuberger Foundation

EIN: 13-6066102

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
990-PF Estimated Tax for 2016	4,900			
990-PF Extension for 2015	461			
Foreign Tax Paid	853	853		