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Return of Private Foundation

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

OMB No 1545-0052

2016

Department of the Treasury
Internal Revenue ServiceDo not enter social security numbers on this form as it may be made public.
Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

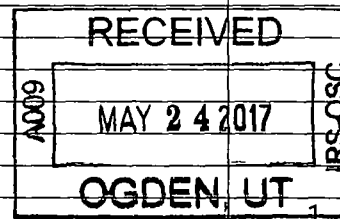
Open to Public Inspection

For calendar year 2016 or tax year beginning

, and ending

Name of foundation SOUTH JERSEY CHARITABLE FOUNDATION		A Employer identification number 22-3643575
Number and street (or P.O. box number if mail is not delivered to street address) 601 WHITE HORSE ROAD	Room/suite	B Telephone number 856.782.2895
City or town, state or province, country, and ZIP or foreign postal code VOORHEES, NJ 08043-2493		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) \$ 6,184,055.26	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 Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check ☒ if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments	20.99	20.99			STATEMENT 1
4 Dividends and interest from securities	129,750.54	129,750.54			STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10	184,545.06				
b Gross sales price for all assets on line 6a	331,345.29				
7 Capital gain net income (from Part IV, line 2)		184,545.06			
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)					
11 Other income					
12 Total. Add lines 1 through 11	314,316.59	314,316.59			
13 Compensation of officers, directors, trustees, etc.	26,000.00	11,700.00			15,000.00
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 3	4,000.00	2,400.00			0.00
c Other professional fees					
17 Interest					
18 Taxes					
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 4	8,760.20	496.00			1,886.79
24 Total operating and administrative expenses. Add lines 13 through 23	38,760.20	14,596.00			16,886.79
25 Contributions, gifts, grants paid	250,000.00				250,000.00
26 Total expenses and disbursements. Add lines 24 and 25	288,760.20	14,596.00			266,886.79
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	25,556.39				
b Net investment income (if negative, enter -0-)		299,720.59			
c Adjusted net income (if negative, enter -0-)				N/A	



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Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	26,938.97	28,669.54	28,669.54
	2 Savings and temporary cash investments	5,418.99	5,439.98	5,439.98
	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			
	7 Other notes and loans receivable ▶			
	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			
	b Investments - corporate stock STMT 5	3,061,716.75	3,104,139.72	5,348,535.16
	c Investments - corporate bonds STMT 6	709,820.94	691,693.57	801,404.99
	11 Investments - land, buildings, and equipment basis ▶			
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other				
14 Land, buildings, and equipment basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe ▶ STATEMENT 7)	496.36	5.59	5.59	
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	3,804,392.01	3,829,948.40	6,184,055.26	
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			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0.00	0.00	
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	0.00	0.00	
28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.00	0.00		
29 Retained earnings, accumulated income, endowment, or other funds	3,804,392.01	3,829,948.40		
30 Total net assets or fund balances	3,804,392.01	3,829,948.40		
31 Total liabilities and net assets/fund balances	3,804,392.01	3,829,948.40		

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	3,804,392.01
2 Enter amount from Part I, line 27a	2	25,556.39
3 Other increases not included in line 2 (itemize) ▶	3	0.00
4 Add lines 1, 2, and 3	4	3,829,948.40
5 Decreases not included in line 2 (itemize) ▶	5	0.00
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	3,829,948.40

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				
b SEE ATTACHED STATEMENT				
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 331,345.29		146,800.23	184,545.06	
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69				
(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	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))	
a				
b				
c				
d				
e			184,545.06	
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		2 184,545.06
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). If (loss), enter -0- in Part I, line 8		{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7		3 N/A

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))
2015	216,874.88	6,122,268.58	.035424
2014	691,704.16	6,223,455.88	.111145
2013	457,333.68	5,834,583.51	.078383
2012	203,714.23	5,352,552.34	.038059
2011	269,729.47	5,232,962.10	.051544
2 Total of line 1, column (d)			2 .314555
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 .062911
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5			4 5,988,028.83
5 Multiply line 4 by line 3			5 376,712.88
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 2,997.21
7 Add lines 5 and 6			7 379,710.09
8 Enter qualifying distributions from Part XII, line 4 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.			8 266,886.79

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)		1	5,994.41
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b			
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).		2	0.00
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		3	5,994.41
3 Add lines 1 and 2		4	0.00
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		5	5,994.41
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			
6 Credits/Payments:			
a 2016 estimated tax payments and 2015 overpayment credited to 2016	6a 6,000.00		
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	6,000.00	
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	5.59	
11 Enter the amount of line 10 to be: Credited to 2017 estimated tax	11	0.00	

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
1b 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
1c 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. \$ 0.00 (2) On foundation managers. \$ 0.00		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ 0.00		
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) NJ, DE		
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 2016 or the taxable year beginning in 2016 (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)

	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)		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)		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► NOT APPLICABLE	X	
14 The books are in care of ► RICHARD W. CULBERTSON JR. Telephone no. ► 856.782.2895 Located at ► 601 WHITE HORSE ROAD, VOORHEES, NJ ZIP+4 ► 08043-2493		
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	N/A
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? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►	16	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.

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☒ Yes ☐ No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No	
(6) Agree to pay money or property to a government official? (Exception Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	☐ Yes ☒ No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here	1b	X
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	X
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? If "Yes," list the years ►	☐ 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. ►		
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.)	N/A	3b
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 2016?	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

X

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.

(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
SEE STATEMENT 8		26,000.00	0.00	0.00

2 Compensation of five highest-paid employees (other than those included on line 1). 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

Part VIII**Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** (continued)**3** Five highest-paid independent contractors for professional services. If none, enter "NONE."

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

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

0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

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

0.00

Form 990-PF (2016)

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	6,062,263.97
b Average of monthly cash balances	1b	16,953.12
c Fair market value of all other assets	1c	
d Total (add lines 1a, b, and c)	1d	6,079,217.09
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.00
2 Acquisition indebtedness applicable to line 1 assets	2	0.00
3 Subtract line 2 from line 1d	3	6,079,217.09
4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	91,188.26
5 Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4	5	5,988,028.83
6 Minimum investment return Enter 5% of line 5	6	299,401.44

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	299,401.44
2a Tax on investment income for 2016 from Part VI, line 5	2a	5,994.41
b Income tax for 2016. (This does not include the tax from Part VI.)	2b	
c Add lines 2a and 2b	2c	5,994.41
3 Distributable amount before adjustments. Subtract line 2c from line 1	3	293,407.03
4 Recoveries of amounts treated as qualifying distributions	4	0.00
5 Add lines 3 and 4	5	293,407.03
6 Deduction from distributable amount (see instructions)	6	0.00
7 Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	293,407.03

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	266,886.79
b Program-related investments - total from Part IX-B	1b	0.00
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	266,886.79
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	5	0.00
6 Adjusted qualifying distributions Subtract line 5 from line 4	6	266,886.79

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				293,407.03
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only			0.00	
b Total for prior years:		0.00		
3 Excess distributions carryover, if any, to 2016:				
a From 2011				
b From 2012				
c From 2013				
d From 2014	248,940.80			
e From 2015				
f Total of lines 3a through e	248,940.80			
4 Qualifying distributions for 2016 from Part XII, line 4: ► \$ 266,886.79				
a Applied to 2015, but not more than line 2a			0.00	
b Applied to undistributed income of prior years (Election required - see instructions)		0.00		
c Treated as distributions out of corpus (Election required - see instructions)	0.00			
d Applied to 2016 distributable amount				266,886.79
e Remaining amount distributed out of corpus	0.00			
5 Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a).)	26,520.24			26,520.24
6 Enter the net total of each column as indicated below				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	222,420.56			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.00		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.00		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.00		
e Undistributed income for 2015. Subtract line 4a from line 2a. Taxable amount - see instr.			0.00	
f Undistributed income for 2016. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2017				0.00
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.00			
8 Excess distributions carryover from 2011 not applied on line 5 or line 7	0.00			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	222,420.56			
10 Analysis of line 9:				
a Excess from 2012				
b Excess from 2013				
c Excess from 2014	222,420.56			
d Excess from 2015				
e Excess from 2016				

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

N/A

1 a 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 foundation 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	
2 a 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).)

NONE

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.

NONE

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:

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 ATTACHED SCHEDULE	N/A			250,000.00
Total			3a	250,000.00
b Approved for future payment NONE				
Total			3b	0.00

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	VANGUARD BALANCED INDEX FUND	P	VARIOUS	09/08/16
b	VANGUARD EXTENDED MARKET INDEX FUND	P	VARIOUS	09/08/16
c	VANGUARD GROWTH INDEX FUND	P	VARIOUS	09/08/16
d	VANGUARD INTER-TERM BOND INDEX FUND	P	VARIOUS	VARIOUS
e	VANGUARD MID-CAP INDEX FUND	P	VARIOUS	09/08/16
f	VANGUARD REIT INDEX FUND	P	VARIOUS	09/08/16
g	VANGUARD TOTAL STOCK MARKET INDEX FUND	P	VARIOUS	09/08/16
h	VANGUARD VALUE INDEX FUND	P	VARIOUS	09/08/16
i	VANGUARD 500 INDEX FUND	P	VARIOUS	09/08/16
j	CAPITAL GAINS DIVIDENDS			
k				
l				
m				
n				
o				

(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 25,000.00		15,110.51	9,889.49
b 50,000.00		16,784.76	33,215.24
c 25,000.00		10,393.61	14,606.39
d 40,000.00		36,776.63	3,223.37
e 25,000.00		9,479.33	15,520.67
f 25,000.00		10,852.60	14,147.40
g 25,000.00		10,699.44	14,300.56
h 50,000.00		25,175.78	24,824.22
i 25,000.00		11,527.57	13,472.43
j 41,345.29			41,345.29
k			
l			
m			
n			
o			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(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	(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
a			9,889.49
b			33,215.24
c			14,606.39
d			3,223.37
e			15,520.67
f			14,147.40
g			14,300.56
h			24,824.22
i			13,472.43
j			41,345.29
k			
l			
m			
n			
o			

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	184,545.06
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). If (loss), enter "-0-" in Part I, line 8	3	N/A

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
VANGUARD FEDERAL MONEY MARKET FUND	6.31	6.31	
VANGUARD PRIME MONEY MARKET FUND	14.68	14.68	
TOTAL TO PART I, LINE 3	20.99	20.99	

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
VANGUARD 500 INDEX FUND	11,719.16	0.00	11,719.16	11,719.16	
VANGUARD BALANCED INDEX FUND	11,264.26	0.00	11,264.26	11,264.26	
VANGUARD EMERGING MARKETS STOCK INDEX FUND	5,406.12	0.00	5,406.12	5,406.12	
VANGUARD EXTENDED MKT INDEX FUND	8,221.19	0.00	8,221.19	8,221.19	
VANGUARD GROWTH INDEX FUND	7,607.75	0.00	7,607.75	7,607.75	
VANGUARD HEALTH CARE FUND	41,403.23	36,249.15	5,154.08	5,154.08	
VANGUARD INTER-TERM BOND INDEX FUND	9,207.64	1,127.39	8,080.25	8,080.25	
VANGUARD LONG-TERM BOND INDEX FUND	10,256.65	434.01	9,822.64	9,822.64	
VANGUARD MID-CAP INDEX FUND	8,103.39	0.00	8,103.39	8,103.39	
VANGUARD REIT INDEX FUND	24,903.41	3,526.81	21,376.60	21,376.60	
VANGUARD REIT INDEX FUND -PRIOR YEAR RETURN OF	<4,491.99>	0.00	<4,491.99>	<4,491.99>	
VANGUARD SHORT-TERM BOND INDEX FUND	723.47	7.93	715.54	715.54	
VANGUARD TOTAL INTL STOCK INDEX FUND	11,472.45	0.00	11,472.45	11,472.45	

VANGUARD TOTAL STOCK MKT INDEX FUND	11,096.91	0.00	11,096.91	11,096.91
VANGUARD VALUE INDEX FUND	14,202.19	0.00	14,202.19	14,202.19
TO PART I, LINE 4	171,095.83	41,345.29	129,750.54	129,750.54

FORM 990-PF	ACCOUNTING FEES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BOWMAN & COMPANY LLP	4,000.00	2,400.00		0.00
TO FORM 990-PF, PG 1, LN 16B	4,000.00	2,400.00		0.00

FORM 990-PF	OTHER EXPENSES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FILING FEES & GENERAL ADMINISTRATIVE EXPENSES	50.00	0.00		0.00
INSURANCE - DIRECTORS & OFFICERS LIABILITY	1,552.79	0.00		1,552.79
INSURANCE - FIDELITY BOND	496.00	496.00		0.00
INSURANCE - GENERAL LIABILITY	667.00	0.00		334.00
FEDERAL EXCISE TAX	5,994.41	0.00		0.00
TO FORM 990-PF, PG 1, LN 23	8,760.20	496.00		1,886.79

FORM 990-PF	CORPORATE STOCK	STATEMENT	5
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE ATTACHED SCHEDULE	3,104,139.72	5,348,535.16
TOTAL TO FORM 990-PF, PART II, LINE 10B	3,104,139.72	5,348,535.16

FORM 990-PF	CORPORATE BONDS	STATEMENT	6
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE	
SEE ATTACHED SCHEDULE	691,693.57	801,404.99	
TOTAL TO FORM 990-PF, PART II, LINE 10C	691,693.57	801,404.99	

FORM 990-PF	OTHER ASSETS	STATEMENT	7
DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
PREPAID FEDERAL EXCISE TAX	496.36	5.59	5.59
TO FORM 990-PF, PART II, LINE 15	496.36	5.59	5.59

FORM 990-PF	PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS	STATEMENT	8
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NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
RICHARD W. CULBERTSON JR 601 WHITE HORSE ROAD VOORHEES, NJ 08043	PRESIDENT 5.00	9,000.00	0.00	0.00
JOHN V. FIELD 422 KINGS HIGHWAY EAST HADDONFIELD, NJ 08033	SECRETARY 3.00	8,000.00	0.00	0.00
RONALD L. WOODS NINETY TANNER STREET HADDONFIELD, NJ 08033	TREASURER 1.00	3,000.00	0.00	0.00
RICHARD G. MOHRFELD 314 AUBURN ROAD PILESGROVE, NJ 08098	TRUSTEE 1.00	3,000.00	0.00	0.00
G. HAROLD HOZEY 218 BIDDULPH ROAD RADNOR, PA 19087	TRUSTEE 1.00	3,000.00	0.00	0.00
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		26,000.00	0.00	0.00

South Jersey Charitable Foundation (EIN 22-3643575)

Allocation of Expenses

2016

<u>Expense</u>	<u>Total</u>	<u>Net Investment Income</u>	<u>Charitable Purposes</u>	<u>Management and General</u>
Compensation of Officers	<u>\$ 26,000 00</u>	<u>\$ 11,700 00</u>	<u>\$ 10,000 00</u>	<u>\$ 3,300 00</u>
Accounting Fees	<u>\$ 4,000 00</u>	<u>\$ 2,400 00</u>	<u>\$ -</u>	<u>\$ 1,600 00</u>
Other Expenses				
Filing Fees & General Administrative Expenses	\$ 50.00			\$ 50 00
Insurance - Directors & Officers Liability	1,552.79		\$ 1,552 79	
Insurance - Fidelity Bond	496 00	\$ 496 00		
Insurance - General Liability	667 00		334 00	333 00
Federal Excise Tax	5,994.41			5,994 41
Total Other Expenses	<u>\$ 8,760 20</u>	<u>\$ 496 00</u>	<u>\$ 1,886 79</u>	<u>\$ 6,377 41</u>

South Jersey Charitable Foundation (EIN 22-3643575)

Schedule of Investments

As Of December 31, 2015 and 2016

<u>Security</u>	<u>December 31, 2015</u>		<u>December 31, 2016</u>	
	<u>Cost Basis</u>	<u>Market Value</u>	<u>Cost Basis</u>	<u>Market Value</u>
Vanguard Funds (Admiral Shares):				
Short-Term Bond Index Fund	47,182 62	48,030 78	47,906 09	48,746 69
Intermediate-Term Bond Index Fund	299,338 08	312,890 88	271,769 09	282,133 39
Balanced Index Fund	346,750 47	515,780 07	342,904 22	535,775 64
Growth Index Fund	253,595.31	534,439.64	250,809.45	542,238 51
Health Care Fund	387,221 50	564,355 19	428,624 73	513,917 49
Mid-Cap Index Fund	237,150.69	521,236.38	235,774 75	554,278 54
REIT Index Fund	295,534 31	503,968 64	305,093 13	523,157 92
Value Index Fund	311,476 75	529,598 27	300,503 17	565,696 02
500 Index Fund	306,496 80	537,764 35	306,688 38	576,072 09
Total Stock Market Index Fund	270,443 16	531,966 64	270,840 63	573,438 64
Extended Stock Market Index Fund	275,760.05	527,640.12	267,196.48	560,216 34
Emerging Markets Stock Index Fund	188,406 16	196,132 32	193,812 28	219,140 89
Total International Stock Index Fund	327,581 74	381,103 44	339,054 19	398,913 34
Vanguard Funds (Investor Shares):				
Long-Term Bond Index	224,600 05	240,788 76	234,856 70	256,214 65
TOTAL	<u>3,771,537 69</u>	<u>5,945,695 48</u>	<u>3,795,833 29</u>	<u>6,149,940 15</u>
Summary				
Corporate Stocks	3,061,716 75	5,137,673 03	3,104,139 72	5,348,535.16
Corporate Bonds	<u>709,820 94</u>	<u>808,022 45</u>	<u>691,693.57</u>	<u>801,404 99</u>
	<u>3,771,537.69</u>	<u>5,945,695 48</u>	<u>3,795,833 29</u>	<u>6,149,940 15</u>

South Jersey Charitable Foundation (EIN 22-3643575)

Schedule of Grants

For The Period January 1, 2016 through December 31, 2016

<u>Name and Address</u>	<u>Purpose of Grant</u>	<u>Paid</u>
American Legion Tatem-Shields Post #17 c/o 311 West Cuthbert Blvd., Haddon Twp., NJ 08108	General Support	\$ 10,000
Animal Welfare Association, Inc. 509 Centennial Blvd., Voorhees, NJ 08043	General Support	36,000
Cathedral Kitchen, Inc. 1514 Federal St., Camden, NJ 08105	General Support	10,000
Collingswood Public Library 771 Haddon Ave., Collingswood, NJ 08108	General Support	10,000
Family Promise 71 Summit Avenue, Summit, NJ 07901	General Support	15,000
Fellowship House of South Camden 1722 Broadway, Camden, NJ 08104	General Support	20,000
Hospitaller Brothers of St. John of God 1145 Delsea Drive, Westville Grove, NJ 08093	General Support	10,000
Joseph's House of Camden 20 Church Street, Camden, NJ 08105	General Support	10,000
Our Lady of Lourdes Health Foundation 800 Haddon Avenue, Camden, NJ 08103	General Support	20,000
Ranch Hope for Boys and Girls Inc. 45 Sawmill Road, Alloway, NJ 08001	General Support	20,000
Ronald McDonald House of Southern NJ, Inc. 550 Mickle Blvd., Camden, NJ 08103	General Support	20,000
Semper Fido, Inc. 131 Kenilworth Road, Marlton, NJ 08053	General Support	15,000
Symphony in C PO Box 8610, Collingswood, NJ 08108	General Support	10,000
Urban Promise P.O. Box 1479, Camden, NJ 08105	General Support	15,000
USO of Pennsylvania & Southern New Jersey Terminal A-East, Phila. Int'l. Airport 8500 Essington Ave., Philadelphia, PA 19153	General Support	25,000
Veterinary Comparative Oncology Research Foundation 739 E Nields Street, West Chester, PA 19382	General Support	4,000
		<u>\$ 250,000</u>