

EXTENDED TO NOVEMBER 15, 20 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 separate instructions is at www.irs.gov/form990pf. OMB No 1545-0052

	For	calendar year 2016 or tax year beginning		, and ending		
	Nar	nme of foundation			A Employer identification	number
	J	JOSEPH PERLMAN FAMILY FOUND	DATION		23-7042532	
		mber and street (or P O box number if mail is not delivered to street a		Room/suite	B Telephone number	
	1	032 OAK RIDGE DRIVE			(847)450-9	000
	City	ty or town, state or province, country, and ZIP or foreign po	stal code		C If exemption application is p	ending, check here
	_ <u>G</u>	ELENCOE, IL 60022				_
	G C	Check all that apply: Initial return	=	rmer public charity	D 1 Foreign organizations	s, check here
		Final return	Amended return		2 Foreign organizations me	eting the 85% test.
		Address change	Name change		2 Foreign organizations me check here and attach co	omputation
	H_(Check type of organization. X Section 501(c)(3) exe		tan	E If private foundation sta	
	<u> </u>	Section 4947(a)(1) nonexempt charitable trust 0 air market value of all assets at end of year J Accounting	Other taxable private foundate g method: X Cash	Accrual	under section 507(b)(1)	
		· I —	er (specify)	Acciual	F If the foundation is in a under section 507(b)(1)	
		▶\$ 845,924. (Part I, colum	nn (d) must be on cash l	pasis)	and section sor(b)(1)	(D), check liefe
		art Analysis of Revenue and Expenses	(a) Revenue and	(b) Net investment	(c) Adjusted net	(d) Disbursements
		(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))	expenses per books	income	income	for charitable purposes (cash basis only)
		1 Contributions, gifts, grants, etc., received			N/A	
		2 Check X if the foundation is not required to attach Sch B				
		3 Interest on savings and temporary cash investments	4 2 4 7 2			
		4 Dividends and interest from securities	18,479.	18,479.		STATEMENT 1
		5a Gross rents				
		D Net rental income or (loss) 6a Net gain or (loss) from sale of assets not on line 10	20,059.			
	Jue	b Gross sales price for all 509,807.	20,033.			
~	Revenue	D assets on line 6a SUS, 607.		20,059.		
2017	ď	8 Net short-term capital gain				
2		9 Income modifications				
⇔		10a Gross sales less returns and allowances				
		b Less Cost of goods sold RECEIVED				
JUN		c Gross profit or (loss)	671	671		ama measeasem o
		11 Other income of 12 Total Add liness through 11 3 2017	-671. 37,867.	-671. 37,867.		STATEMENT 2
		12 Total Add Infest through 111)	37,867.	37,867.		0.
SCANNED		14 Other employee salar (S) (Mage N, UT	0.	.		0.
N.		15 Pension plans, employee benefits				
ത്	ses	16a Legal fees				
_	and Administrative Expense:	b Accounting fees STMT 3	2,100.	0.		0.
	Ä	c Other professional fees				
	tive	17 Interest				
	stra	18 Taxes		- 		
	Ĕ	19 Depreciation and depletion				
	μħ	20 Occupancy Label Travel, conferences, and meetings				
	þ	22 Printing and publications	· · · · · · · · · · · · · · · · · · ·			
	<u>a</u>	23 Other expenses STMT 4	5,060.	5,060.		0.
	Operating	24 Total operating and administrative	0,7000		-	
	per	expenses Add lines 13 through 23	7,160.	5,060.		0.
	0	25 Contributions, gifts, grants paid	22,580.			22,580.
		26 Total expenses and disbursements				
		Add lines 24 and 25	29,740.	5,060.		22,580.
		27 Subtract line 26 from line 12:	2 42-			
		a Excess of revenue over expenses and disbursements	8,127.	20.005		
		b Net investment income (if negative, enter -0-)		32,807.	NI / A	
		C Adjusted net income (if negative, enter -0-)			N/A	L

823501 11-23-18 LHA For Paperwork Reduction Act Notice, see instructions

6 Enter 1% of net investment income (1% of Part I, line 27b)

7 Add lines 5 and 6

623521 11-23-18

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.

Form 990-PF (2016)

328.

48,068.

22,580.

6

_	1990-PF (2016) JOSEPH PERLMAN FAMILY FOUNDATION 23-704 ort VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see			Page 4 ns)
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% 1		6	<u>56.</u>
	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	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			<u>0.</u>
3	Add lines 1 and 2		6	56.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			<u>0.</u>
5	Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0-		6	<u>56.</u>
6	Credits/Payments			
а	2016 estimated tax payments and 2015 overpayment credited to 2016 6a 4 29.			
	Exempt foreign organizations - tax withheld at source 6b			
	Tax paid with application for extension of time to file (Form 8868) 6c 1,002.			
	Backup withholding erroneously withheld 6d			
	Total credits and payments Add lines 6a through 6d		1, 4	<u>31.</u>
	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached 8			
	Tax due If the total of lines 5 and 8 is more than line 7, enter amount owed			
	Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			<u>75.</u>
	Enter the amount of line 10 to be Credited to 2017 estimated tax			0.
	rt VII-A Statements Regarding Activities	T	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	<u> </u>	res	-
	any political campaign?	1a		X
	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)?	1b	 	X
	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			
	Did the foundation file Form 1120-POL for this year?	1c	[_X_
ū	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation \$\Bigsim \bigsim \b			Ì
	(1) On the foundation ► \$ 0. (2) On foundation managers. ► \$ 0. Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation			
e	managers. > \$ 0.			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		x
	If "Yes," attach a detailed description of the activities	-		
	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		х
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		X
	If "Yes," has it filed a tax return on Form 990-T for this year? N/A	4b		
	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		X
	If "Yes," attach the statement required by General Instruction T			
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:			
	By language in the governing instrument, or			1
	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		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	7	_X	
			ļ	{
8a	Enter the states to which the foundation reports or with which it is registered (see instructions)			
	IL		<u> </u>	
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	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			1
	year 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? If "Yes," complete Part XIV	9	ļ	X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X
	Fi Fi	rm 99 0)-PF	(2016)

	SOUTH (2010) OUDBIT THE PROPERTY OF THE PROPER	1994		r age o
Pa	ert 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		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		<u>X</u>
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
	Website address ► N/A			
14	The books are in care of ► WILLARD SHONFELD Telephone no. ► (847)			<u>U</u>
	Located at ► 1032 OAK RIDGE DR., GLENCOE, IL ZIP+4 ►60	1022		
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	N	/A	NI-
16	At any time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank,		Yes	No
	securities, or other financial account in a foreign country?	16	L	_X_
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the			
Da	toreign country ► ort VII-B Statements Regarding Activities for Which Form 4720 May Be Required			
Га			Vaa	No
4.	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 X No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)			
	a disqualified person? Yes X No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes X 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 X 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.)			
			·	
υ	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)? N/A Occupient to the control of the control o	1b		 -
	Organizations relying on a current notice regarding disaster assistance check here Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected			
C		,		Х
2	before the first day of the tax year beginning in 2016? Taxon on follow to distribute recome (continue 4043) (does not expely for years the foundation was a private energing foundation.	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)). 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			
a	before 2016? Light the critical day year 2016, and the foundation have any undistributed income (lines od and de, 1 art XIII) for tax year(s) beginning Light the critical day year 2016, and the foundation have any undistributed income (lines od and de, 1 art XIII) for tax year(s) beginning Light the critical day year 2016, and the foundation have any undistributed income (lines od and de, 1 art XIII) for tax year(s) beginning Light the critical day year 2016, and the foundation have any undistributed income (lines od and de, 1 art XIII) for tax year(s) beginning Light the critical day year 2016, and the foundation have any undistributed income (lines od and de, 1 art XIII) for tax year(s) beginning			
	vine at an			
h	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	2ь		
c	the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here	7.0		
Ĭ	•	} }		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time			
-	during the year?			
ь	of "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	Зь		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	<u> </u>	Х
	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		Х
_				

Form 990-PF (2016) JOSEPH PERLMAN FAMILY FO			<u>23-70425</u>	32	Page 6
Part VII-B Statements Regarding Activities for Which I	Form 4720 May Be F	Required (contin	ued)		
5a During the year did the foundation pay or incur any amount to			}	1	-
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	n 4945(e))?	Ye	s X No		
(2) Influence the outcome of any specific public election (see section 4955), of	or to carry on, directly or indire	ectly,			
any voter registration drive?		Y6	s X No		ľ
(3) Provide a grant to an individual for travel, study, or other similar purposes	?		s X No		
(4) Provide a grant to an organization other than a charitable, etc., organizatio	n described in section			-	
4945(d)(4)(A)? (see instructions)		Ye	s X No		ĺ
(5) Provide for any purpose other than religious, charitable, scientific, literary,	or educational purposes, or f				
the prevention of cruelty to children or animals?	,		s X No		
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify unit	der the exceptions described i				
section 53.4945 or in a current notice regarding disaster assistance (see instru	· · · · · · · · · · · · · · · · · · ·	y	N/A	5b	
Organizations relying on a current notice regarding disaster assistance check h	,		▶		
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption fi		ined			
expenditure responsibility for the grant?		//A □ Y€	s No	İ	
If "Yes," attach the statement required by Regulations section 53 494		17.22	.3		
6a Did the foundation, during the year, receive any funds, directly or indirectly, to	` '		ľ		
a personal benefit contract?	pay premiums on	□ v _e	es X No		
b Did the foundation, during the year, pay premiums, directly or indirectly, on a p	organal hanafit contract?	16	1	6Ь	Х
If "Yes" to 6b. file Form 8870.	reisonai Deneni Contract,		-	00	<u> </u>
7a At any time during the tax year, was the foundation a party to a prohibited tax s	shalter transaction?		s X No		
		L 1 t		7b	
Part VIII Information About Officers, Directors, Trust		nagore Highly		/U	
Paid Employees, and Contractors	ees, roundation ma	mayers, migning	,		
List all officers, directors, trustees, foundation managers and their	compensation.	· · · · · · · · · · · · · · · · · · ·	·		
	(b) Title, and average	(c) Compensation	(d) Contributions to	(e)	Expense
(a) Name and address	hours per week devoted to position	(If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	ačcó	Expense unt, other wances
WILLARD L SHONFELD	PRESIDENT	enter -0-)	compensation	anc	wances
1032 OAK RIDGE DRIVE	FKESIDENI				
GLENCOE, IL 60022	1.00	0.	0.		0.
KENNETH SHONFELD	VICE PRESIDEN				<u> </u>
865 LAMSON DRIVE	VICE PRESIDEN	! ±			
WINNETKA, IL 60093	1.00	0.	0.		0
FRANCINE SHONFELD	SECRETARY/TRE		<u> </u>		0.
	SECKETARI/IKE	ASUKEK			
2259 SHERIDAN ROAD	1 00	0.			0
HIGHLAND PARK, IL 60035	1.00	U •	0.		0.
	-				
	}				
2 Compensation of five highest-paid employees (other than those inc	luded on line 1). If none.	enter "NONE."	<u> </u>		
	(b) Title, and average	1	(d) Contributions to	(e)	Expense
(a) Name and address of each employee paid more than \$50,000	hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	ačcó	Expense unt, other wances
NONE	devoted to position		compensation	and	wances
HOME					
					
	1]			
		 			
	1				
		 			
	{				
		 			
	1				
Texast number of other employees and over \$50,000	<u></u>	<u> </u>		L	0
Total number of other employees paid over \$50,000			·		<u> </u>

Part VIII Information About Officers, Directors, Trustees, Foundation I		7042532 Page 7
Paid Employees, and Contractors (continued) 3 Five highest-paid independent contractors for professional services. If none, enter "NON"	IC "	
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE	(6) 1) po ot corrido	(c) component
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 info number of organizations and other beneficiaries served, conferences convened, research papers produced, e		Expenses
1N/A		
<u> </u>		
		
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 <u>N/A</u>		
2		
All other program-related investments. See instructions.		
3		
		
Total. Add lines 1 through 3	<u> </u>	0 . Form 990-PF (2016)
		101111 220-F1 (2010)

P	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations	ndations, se	ee 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	753,704.
	Average of monthly cash balances	1b	49,691.
	Fair market value of all other assets	1c	
đ	Total (add lines 1a, b, and c)	1d	803,395.
	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation) 1e 0.		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	803,395.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	12,051.
5	Net value of noncharitable-use assets Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	791,344.
6	Minimum investment return Enter 5% of line 5	6	39,567.
P	Tart XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations are foreign organizations check here ▶ ☐ and do not complete this part.)	nd certain	
1	Minimum investment return from Part X, line 6	1	39,567.
2a	Tax on investment income for 2016 from Part VI, line 5		
b	Income tax for 2016. (This does not include the tax from Part VI)		
C	Add lines 2a and 2b	2c	656.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	38,911.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	38,911.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	38,911.
P	art 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	22,580.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	22,580.
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.
6	Adjusted qualifying distributions Subtract line 5 from line 4	6	22,580.
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation (4940(e) reduction of tax in those years.	qualifies for t	he section

Part XIII Undistributed Income (see instructions)

1 Distributable amount for 2016 from Part XI, line 7 2 Undistributed income, if any, as of the end of 2016 a Enter amount for 2015 only b Total for prior years 0. 3 Excess distributions carryover, if any, to 2016: a From 2011		(a) Corpus	(b) Years prior to 2015	(c) 2015	(d) 2016
line 7 38,911 2 Undistributed income, if any, as of the end of 2016 0. a Enter amount for 2015 only 0. b Total for prior years 0. 3 Excess distributions carryover, if any, to 2016: 0. a From 2011 10,524. b From 2012 5,739. c From 2013 3,562. d From 2014 5,991. e From 2015 24,448. f Total of lines 3a through e 50,264. 4 Oualifying distributions for 2016 from Part XII, line 4: ►\$ 22,580.	1 Distributable amount for 2016 from Part XI	Обіраб	100.0 p.10. 10 20 10	2010	2010
2 Undistributed income, if any, as of the end of 2016 a Enter amount for 2015 only b Total for prior years					38,911.
a Enter amount for 2015 only b Total for prior years 3 Excess distributions carryover, if any, to 2016: a From 2011	· · · · · · · · · · · · · · · · · · ·				30/3225
b Total for prior years 7.				0.	
3 Excess distributions carryover, if any, to 2016: a From 2011	-				
a From 2011 10,524. b From 2012 5,739. c From 2013 3,562. d From 2014 5,991. e From 2015 24,448. f Total of lines 3a through e 50,264. 4 Qualifying distributions for 2016 from Part XII, line 4: ▶\$ 22,580.			0.		
b From 2012 5,739. c From 2013 3,562. d From 2014 5,991. e From 2015 24,448. f Total of lines 3a through e 50,264. 4 Qualifying distributions for 2016 from Part XII, line 4: ▶\$ 22,580.	3 Excess distributions carryover, if any, to 2016:	}			
c From 2013 3,562. d From 2014 5,991. e From 2015 24,448. f Total of lines 3a through e 50,264. 4 Qualifying distributions for 2016 from Part XII, line 4: ▶\$ 22,580.					
d From 2014 5,991. e From 2015 24,448. f Total of lines 3a through e 50,264. 4 Qualifying distributions for 2016 from Part XII, line 4: ▶\$ 22,580.					
e From 2015					
f Total of lines 3a through e 50,264. 4 Qualifying distributions for 2016 from Part XII, line 4: ▶\$ 22,580.					
4 Qualifying distributions for 2016 from Part XII, line 4: ►\$ 22,580.					
Part XII, line 4: ►\$ 22,580.		50,264.			
a Applied to 2015, but not more than line 2a				0.	
b Applied to undistributed income of prior					
years (Election required - see instructions) 0.	· · · · · · · · · · · · · · · · · · ·		<u> </u>		
c Treated as distributions out of corpus	· 1				
(Election required - see instructions) 0.	· · · · · · · · · · · · · · · · · · ·	<u> </u>			22 500
					22,580.
e Remaining amount distributed out of corpus 0.	_ · · · ·				16,331.
5 Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a))	(If an amount appears in column (d), the same amount	10,331.		- 	10,331.
6 Enter the net total of each column as indicated below	6 Enter the net total of each column as				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	2 Corpus Add lines 3f, 4c, and 4e Subtract line 5	33,933.			
b Prior years' undistributed income. Subtract	b Prior years' undistributed income. Subtract				
line 4b from line 2b	line 4b from line 2b		0.		
c Enter the amount of prior years'					
undistributed income for which a notice of deficiency has been issued, or on which					
the section 4942(a) tax has been previously					
assessed 0.			0.		
d Subtract line 6c from line 6b. Taxable	d Subtract line 6c from line 6b. Taxable				
amount - see instructions 0.	F		0.		
e Undistributed income for 2015. Subtract line	1				
4a from line 2a. Taxable amount - see instr.				0.	
f Undistributed income for 2016. Subtract					
lines 4d and 5 from line 1. This amount must					
	F				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)	1	n			
may be required - see instructions) 8 Excess distributions carryover from 2011	· F				
not applied on line 5 or line 7	-	0			
9 Excess distributions carryover to 2017.					
Subtract lines 7 and 8 from line 6a 33, 933.	l l	33 933			
10 Analysis of line 9:					
a Excess from 2012	ı				
b Excess from 2013 3, 494.					1
c Excess from 2014 5, 991.					
d Excess from 2015 24, 448.					
e Excess from 2016				<u> </u>	

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1 at the foundation has received a ruling or obtamination letter that it is a private operating foundation, and the ruling is effective for 2016, sheet the stole of the ruling is Check box to indicate whether the bunchion is a private operating foundation described in section 1 of 4942(n)(3) or	Part XIV Private Operating Fo		ILLY FOUNDAT		N/A	3-7042532 Page 10
foundation, and the enting is effective for 2016, either the date of the ruing Checks bor to indicate whether the hondation is a garnet operating foundation described in section 4942(i)(3) or 4942(i)(5) 2 a Enter the baser of the adjusted net income from Part 2 to the minimum and the section of the adjusted net income from Part 2 to the minimum and the part of the proof years listed 8 5% of line 2 C Dualifying distributions from Part 2XI, in the for each year listed 4 Amenitis included in line 2 end is used directly for active candidate of exempt alcenters C Dualifying distributions made directly for active conduct of exempt alcenters Support all income Part 2 to the part	<u></u>	 _	 	71, question 67	N/A	
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d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:	c Any submission deadlines:					
e Any restrictions of annual on analos, such as by geographical areas, characute helps, allius of institutions, of other lactors.	d Any restrictions or limitations on awards	such as hy geographic	al areas, charitable fields	kinds of institutions of	or other factore:	
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Total	3 Grants and Contributions Paid During the Year or Approved for Future Payment					
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A Paid during the year SEE ATTACHED STATEMENT 7 NONE TOTAL NONE TOTAL NONE P 34 22 580.	Name and address (home or business)	any foundation manager or substantial contributor	l status of	contribution	Amount 	
Total	a Paid during the year					
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Part XVI-A	Analysis of	Income-Producing	Activities
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Enter gross amounts unless otherwise indicated	Unrelated	business income		ed by section 512 513, or 514	(e)
	(a)	(b)	(c) Exclu-	(d)	Related or exempt
1 Program service revenue:	Business code	Amount	sion	Amount	function income
a	1				
b	-				
С	1 1		1 1		
d					
е	1 1				
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	18,479.	
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			14	<u>-671.</u>	
8 Gain or (loss) from sales of assets other	1				
than inventory			18	20,059.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue	1		1		
a	_				
b	_				
c	_		_ .		
d	_				
e	_		- -		
12 Subtotal. Add columns (b), (d), and (e)).	37,867.	0.
13 Total. Add line 12, columns (b), (d), and (e)				13	37,867.
(See worksheet in line 13 instructions to verify calculations.)	<u> </u>				

Part XVI-B Relationship of Activities t	o the Accomplishment o	of Exempt Purposes
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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).					
	······································					

623621 11-23-16

1. Did the organization decidity or indirectly engage in any of the following schedule of the assential SIL(s) organization of section 57 (-16) organization or 1 (1) Cash (2) Other assets 1 (1) Cash (2) Cas	Part XVII	Information Re Exempt Organi	egarding Transfers To	and Transactions a	nd Relationsh	ips With Noncharitable)	
the Code (other than section 501(s)(3) organizations) or in section 527, relating to political organization re? 1 Transfers from the reporting foundation to a noncharitable exempt organization of (1) Cash (2) Other assets (1) Sistes of assets to an oncharitable exempt organization (2) Purchases of assets from a noncharitable exempt organization (3) Renat of foothers, equipment, or other assets (4) Rembuscement arrangements (5) Loans or than guarantees (6) Performance of reserves or membership or fundrasing solicitations (5) Remarks and organization (6) Performance of services or membership or fundrasing solicitations (5) Remarks and organization (6) Performance of services or membership or fundrasing solicitations (6) Performance of services or membership or fundrasing solicitations (7) Interest organization (8) Amount involved (6) Amount involved (6) Amount involved (6) Amount involved (7) Interest organization (8) Intrest conditions organization (8) Intrest organization (9) Description of relationship 1 Intrest conditions or transfer organization (10) Title (10) Interest organization (10	1 Did the o			no with any other organization	on described in section	2 501/c) of	Yes	No
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(2) Other sasets b Other transactions: (1) Sales of assets to an anonchariable exempt organization (2) Purchase of assets to an anonchariable exempt organization (3) Rental of facilities, equipment, or other assets (4) Reminiscented arrangements (5) Loans or than guarantees (5) Performance of services or membership or fundrasing solicitations (5) Performance of services or membership or fundrasing solicitations (5) Performance of services or membership or fundrasing solicitations (5) Performance of services or membership or fundrasing solicitations (6) Performance of services or membership or fundrasing solicitations (7) Performance of services or membership or fundrasing solicitations (8) Performance of services or membership or fundrasing solicitations (9) Performance of services or membership or fundrasing solicitations (9) Performance of services or membership or fundrasing solicitations (9) Performance of services or membership or fundrasing solicitations (9) Performance of services or membership or fundrasing solicitations (9) Performance of services or membership or fundration or services given by the regioning beneficials. If the condition received less than fair market value or any fransaction or sharing arrangement, show in column (9) the value of the goods, other assets, or paid employees 2a		•	• • •	· · · · · ·				
0 Oher transactions: 13 Sales of a sessite for an onocharidable exempt organization 16(1) X 18(2) X		• •	·			1a(1)		Х
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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 52?? Yes X No	column (· · · · · · · · · · · · · · · · · · ·		
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? Jection 501(c) of the Code (other than section 501(c)(3)) or in section 527? Jection for the Code (other than section 501(c)(3)) or in section 527? Jection for relationship organization (c) Description of relationship	(a) Line no	(b) Amount involved		e exempt organization	(d) Description o	f transfers, transactions, and sharing ar	rangeme	nts
In section 501(c) of the Code (other than section 501(c)(3)) or in section 527? If "Yes," complete the following schedule. (a) Name of organization N/A Under penalties of perjuny, I declare that I have a variinged this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Operturation of the perger (other than taxpayer) is based on all information of which preparer has any knowledge and belief, it is true, correct, and complete Operturation of the perger (other than taxpayer) is based on all information of which preparer has any knowledge shown below (see instit ?? Variable			N/A					
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b if "Yes," complete the following schedule. (a) Name of organization (b) Type of organization (c) Description of relationship N/A Sign 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 bejet, it is true, correct, and complete observation of greater (other than taxpayer) is based on all information of which preparer about below (see instring). No Print/Type preparer's name Preparer's signature Print's address ► 5250 OLD ORCHARD RD, STE 400 SKOKIE, IL 60077 - 4460 Phone no. (847) 256-3100		-		• •	zations described		[]	٦.,
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N/A Sign Here Under penalties of perjury, I declare that I have xamined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and computes obscipation of geparer (other than taxpayer) is based on all information of which preparer shown below (see instription of officer or trustee Date Title	b ii res, c			(h) Type of organization	le.	Description of relationship		
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Signature of officer or trustee Date Title	Sign	Delier, it is true, correct, and con-	made. Decisiation of peparer (other tha	an taxpayer) is based on an inform	N	shown below	e prepar (see ins	er tr)?
Paid Preparer's name Preparer's signature JAMES I. HECHTMAN Preparer Use Only Firm's name ► THE HECHTMAN GROUP LTD Firm's address ► 5250 OLD ORCHARD RD, STE 400 SKOKIE, IL 60077-4460 Polte Check if PTIN self- employed Firm's EIN ► 36-3894414 Phone no. (847) 256-3100	<u> </u>	mul L	1 Poc			<u> </u>	. [] No
Paid Preparer Use Only Firm's address > 5250 OLD ORCHARD RD, STE 400 SKOKIE, IL 60077-4460 Self- employed P00548010 Firm's EIN > 36-3894414 Phone no. (847) 256-3100	Sig							
Paid Preparer Use Only JAMES I. HECHTMAN GROUP LTD P00548010 Firm's name ► THE HECHTMAN GROUP LTD Firm's EIN ► 36-3894414 Firm's address ► 5250 OLD ORCHARD RD, STE 400 Phone no. (847) 256-3100		Print/Type preparer's na	ime Preparer's s	signature		<u> </u>		
Preparer Use Only Firm's name THE HECHTMAN GROUP LTD Firm's EIN 36-3894414	Daid	73.450	/\ Ti		S. S. S	` *	01.	
Use Only Firm's address ► 5250 OLD ORCHARD RD, STE 400 Phone no. (847) 256-3100				eux D	~ `~ `			
Firm's address ► 5250 OLD ORCHARD RD, STE 400 SKOKIE, IL 60077-4460 Phone no. (847) 256-3100	-	Firm's name > THE	nECHTMAN QKOUL	Y LTD	' '	rirms Ein ► 36-38944	14	
SKOKIE, IL 60077-4460 Phone no. (847) 256-3100	300 Only		קמאטים איני	PD CME 400				
						Phone no (217) 256	_ 21	ሰሰ
		, DK	<u> </u>	1100				

23-7042532

Part.IV | Capital Gains and Losses for Tax on Investment Income (b) How acquired P - Purchase D - Donation (a) List and describe the kind(s) of property sold, e.g., real estate, (c) Date acquired (d) Date sold 2-story brick warehouse; or common stock, 200 shs MLC Co. (mo., day, yr) (mo, day, yr.) 1a 250 SH NEXTERA ENERGY 05/22/15|02/23/16 b 100000 SH JP MORGAN CHASE 3.15% |06/26/13|<u>0</u>7/05<u>/16</u> c SEE STATEMENT A WARIOUS 12/31/16 VARIOUS 12/31/16 d SEE STATEMENT A WARIOUS |12/31/16 e SEE STATEMENT f ICAHN VARIOUS 12/31/16 g ICAHN VARIOUS 12/31/16 h CAPITAL GAIN DISTRIBUTION P k m n 0 (f) Depreciation allowed (g) Cost or other basis (h) Gain or (loss) (e) Gross sales price (or allowable) plus expense of sale (e) plus (f) minus (g) 29,033. 25,600 3,433. a 100,000. 100,000 h 0. 62,323. 67,788. -5,465. C 65,168. 66,860 -1,692. d 251,825. 229,500 22,325. е -26-26. 78. 78. g 1,406. 1,406. h m n 0 Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69 (I) Losses (from col (h)) Gains (excess of col. (h) gain over col. (k), (j) Adjusted basis (k) Excess of col (i) but not less than "-0-") (i) F.M.V. as of 12/31/69 as of 12/31/69 over col. (j), if any 3,433. a 0. b -5,465. C -1,692. d 22,325. е -26. 78. 1,406. k m n 0 $\{\begin{array}{ll} \mbox{If gain, also enter in Part I, line 7} \\ \mbox{If (loss), enter $\hbox{\tt "-0-" in Part I, line 7}} \end{array}\}$ 2 Capital gain net income or (net capital loss) 20,059. 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 N/A

FORM 990-PF D	IVIDENDS	AND INTER	EST FROM	SECUR	ITIES S	TATEMENT	1
	GROSS AMOUNT	CAPITAL GAINS DIVIDEND	REV	A) ENUE BOOKS	(B) NET INVEST- MENT INCOME		
BROKERAGE ACCOUNT ICAHN ENTERPRISES	18,300. 179.		0. 1	8,300. 179.	· · · · · · · · · · · · · · · · · · ·		
TO PART I, LINE 4	18,479.		0. 1	8,479.	18,479.		
FORM 990-PF		OTHER I	NCOME		S	ТАТЕМЕПТ	2
DESCRIPTION			(A) REVENUE PER BOOK		(B) ET INVEST- ENT INCOME	(C) ADJUSTEI NET INCOM	
ICAHN				671.	-671.		
TOTAL TO FORM 990-PF,	PART I,	LINE 11		671.	-671.		
FORM 990-PF		ACCOUNTI	NG FEES		S	TATEMENT	3
		(A)					
DESCRIPTION		EXPENSES PER BOOKS	(B) NET INV MENT IN	EST-	(C) ADJUSTED NET INCOME	(D) CHARITAI PURPOSI	
DESCRIPTION ACCOUNTING AND TAX PREFEES		EXPENSES	NET INV MENT IN	EST-	ADJUSTED	CHARITA	
ACCOUNTING AND TAX PRE	 P	EXPENSES PER BOOKS	NET INV MENT IN	EST- COME	ADJUSTED	CHARITA	ES
ACCOUNTING AND TAX PRE	 P	EXPENSES PER BOOKS 2,100. 2,100.	NET INV MENT IN	COME 0.	ADJUSTED NET INCOME	CHARITA	0.
ACCOUNTING AND TAX PRE FEES TO FORM 990-PF, PG 1,	LN 16B	EXPENSES PER BOOKS 2,100. 2,100. OTHER E (A) EXPENSES	NET INV MENT IN XPENSES (B) NET INV	COME 0. 0. EST-	ADJUSTED NET INCOME	CHARITAI PURPOSI	0. 0. 4
ACCOUNTING AND TAX PRE FEES TO FORM 990-PF, PG 1, FORM 990-PF	LN 16B	EXPENSES PER BOOKS 2,100. 2,100. OTHER E (A) EXPENSES	NET INV MENT IN XPENSES (B) NET INV MENT IN	COME 0. 0. EST-	ADJUSTED NET INCOME S (C) ADJUSTED	CHARITAI PURPOSI TATEMENT (D) CHARITAI	0. 0. 4

FORM 990-PF	CORPORATE STOCK		STATEMENT 5
DESCRIPTION		BOOK VALUE	FAIR MARKET VALUE
RAYMOND JAMES - EQUITIES RAYMOND JAMES - MUTUAL FUNDS		524,655. 51,799.	573,986. 51,679.
TOTAL TO FORM 990-PF, PART II,	LINE 10B	576,454.	625,665.
FORM 990-PF	CORPORATE BONDS		STATEMENT 6
DESCRIPTION		BOOK VALUE	FAIR MARKET VALUE
RAYMOND JAMES - CORPORATE BONDS	1	177,505.	177,386.
TOTAL TO FORM 990-PF, PART II,	LINE 10C	177,505.	177,386.

JOSEPH PERLMAN FOUNDATION

EIN: 23-7042532

YEAR ENDED DECEMBER 31, 2016

PART XV GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR DETAIL

	<u>Relationship</u>	Foundation <u>Status</u>	Purpose of <u>Grant</u>	
Am Shalom	None	501{c}	Charitable	11,550.00
America Friends of Beit Shapiro	None	501{c}	Charitable	300 00
Beth El	None	501{c}	Charitable	3,500.00
Brandeis	None	501{c}	Charitable	1,000.00
Camp Ramah	None	501{c}	Charitable	3,000 00
Dystonia Medical Research	None	501{c}	Charitable	150.00
Highland Park Strings	None	501{c}	Charitable	1,000.00
Hillel of Colorado	None	501{c}	Charitable	150.00
Leukemia & Lymphoma	None	501{c}	Charitable	75.00
Night Ministry	None	501{c}	Charitable	1,000.00
Planned Parenthood	None	501{c}	Charitable	150 00
St Joseph	None	501{c}	Charitable	25 00
The Ark	None	501{c}	Charitable	180.00
US Holocuat Museum	None	501{c}	Charitable	100.00
Weitzman Institute	None	501{c}	Charitable	400.00
Total				22,580 00

DONEE ADDRESSES AVAILABLE UPON REQUEST

STATEMENT 7