Form **990-PF**

EXTENDED TO NOVEMBER 15, 2017 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

	For	calei	idar year 2016 or tax year beginning			, and ending			-	
			f foundation BERT & ROSALIE GOL	DBERG				A Employer identification	number	
			ILY FOUNDATION INC					30-0127167		
			and street (or PO box number if mail is not delive	√suite	B Telephone number					
			COPPLES LANE					610-667-2448		
			own, state or province, country, and ZIP			-		C If exemption application is p	ending, check here	
	_ W	AL	LINGFORD, PA 1908	<u>6-643</u>	<u> 1</u>					
	G Check all that apply: Initial return Initial return of a former public charity Amended return X Address change Name change							harity D 1. Foreign organizations, check		
								Foreign organizations me check here and attach co	eting the 85% test,	
	H (heck			xempt private foundation				· -	
		Se	ction 4947(a)(1) nonexempt charitable ti		Other taxable private foundation			E If private foundation status was terminated under section 507(b)(1)(A), check here		
	l Fa	_			ing method: X Cash	Accrual	_		•	
	(fi	om i	Part II, col (c), line 16)		ther (specify)			F If the foundation is in a under section 507(b)(1)		
		\$		Part I, colu	ımn (d) must be on cash i	pasis)		and section 307 (b)(1)(b), check here		
ı	Part 1 Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (e))				(a) Revenue and expenses per books	(b) Net investment	ent	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)	
		1	Contributions, gifts, grants, etc., receive	d		» ~	<i>(</i>)	N/A	×	
		2	Check X if the foundation is not required to at		***	\$ <	٠ >	\	* .k. * * * 2 2	
,	evenue	3	Interest on savings and temporary cash investments		13.		13.		STATEMENT (1)	
		4	Dividends and interest from securities		15,078.	15,0	78.		STATEMENT 2	
		5a	Gross rents						\$:74X × C	
		b	Net rental income or (loss)		\$18	¥ .	\$	<u> </u>	STO BER AN	
		6a	Net gain or (loss) from sale of assets not on line		4,156.	Re II		\$ '	***	
		b	Gross sales price for all assets on line 6a 438,	<u>970.</u>	₩·			`&````````````````````````````````````		
	ě	7	Capital gain net income (from Part IV, line 2)		` <u>'</u> %\.	4,1	56.		***	
	Œ	8	Net short-term capital gain		41 - 138 22	>%			*	
		9	Income modifications Gross sales less returns						′ &:	
		١.	and allowances			``````````````````````````````````````		S. S. C.	i iik	
			Less Cost of goods sold				X 1		**************************************	
			Gross profit or (loss)				* ***	- , <u></u>		
			Other income		10 247	10.0	4 7		\$ 4.415 *	
-		12 13	Total. Add lines 1 through 11		19,247.	19,2			% 2011A	
		14	Compensation of officers, directors, trustees et Other employee salaries and wages	С	0.		0.		0.	
			Pension plans, employee benefits						<u> </u>	
	Ş		· · · · · · · · · · · · · · · · · · ·		····	<u> </u>				
	enses	h	Accounting Fees EIVED ST	1 T 3	6,150.	3,0	75		3,075.	
	xpe	C	Other professional fees		0,230.		, , ,		3,073.	
	e E	17	Best OCT 0 8 2017							
<u>~</u> :	ativ	18	Other professional fees fifte est OCT 0.8 2017	IT 4	76.		76.		0.	
, 107	istr	19	Depreciation and depletion UT					 -	\$ X % %	
, 1	nin	20	Occupancy						/\ ^*\ **	
>	Adı	17 18 19 20 21	Travel, conferences, and meetings							
د	and	22	Printing and publications						_	
5		23	Other expenses STN	IT 5	7,212.	7,1	12.		100.	
3	perating	24	Total operating and administrative						<u>_</u>	
Ţ	per		expenses. Add lines 13 through 23		13,438.	10,2	63.		3,175.	
é:	0		Contributions, gifts, grants paid		42,821.	%		\ \ \\	42,821.	
, , , , , , , , , , , , , , , , , , ,		26	Total expenses and disbursements.						_	
	_	_	Add lines 24 and 25		56,259.	10,2	63.		45,996.	
Q		27	Subtract line 26 from line 12:		\$ <u>%</u>	* 1.5	<u> </u>		1	
		a	Excess of revenue over expenses and disbursen	nents	<37,012.>	<u> </u>	, ×ä.	<u> </u>	¥	
			Net investment income (if negative, enter-	0-)	4, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1, 1,	8,9	84.		i , ĭ	
-			Adjusted net income (if negative, enter -0-)		\$ \$ \$ \$ \$ \$ \$ \$	À.K.	· ·	N/A	47 4 (4	
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Page 2

1 Cash - non-entitures/-bearing 126, 630 73, 716 73, 715	F	art	Balance Sheets Attached schedules and amounts in the description	Beginning of year	End (of year
2 Sivenge and temporary cash executions 3 Accounts receivable Lass; allowance for doubtful accounts 4 Pledgas receivable 5 Grains receivable 6 Receivable as due from officers, directors, trustees, and other diagnatified persons 7 Demicrosis retains cash to a stress that the stress receivable and other diagnatified persons 8 Receivable due from officers, directors, trustees, and other diagnatified persons 9 Preparad expenses and deferred charges 10 Investments - Corporate bonds 11 Investments - Corporate bonds 12 Investments - Corporate bonds 13 Investments - Corporate bonds 14 Land, Duddings, and exampment base 15 Investments - Corporate bonds 16 Toftal assets (for be completed by all fillers - See the instructors. Also, see page 1, from 1) 17 Accounts payable and accreed expenses 18 Grains psyable 19 Deferred revenus 20 Lawar-form inters, records, Rudske, and office and designation 21 Corporate bonds 22 Corporate bonds 23 Total liabilities (old lines 17 through 20) 24 Corporate bonds 25 Permanently restricted 26 Permanently restricted 27 Permanently restricted 28 Permanently restricted 29 Permanently restricted 20 Permanently restricted 20 Permanently restricted 20 Permanently restricted 21 Total of assets of kurd balances at beginning of year - Part II, column (a), line 30 27 Corporate bonds and officers of the State	=	_	column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value
2 Savings and temporary cosh investments 3 Accounts recorded ▶ Less, allowance for doubtful accounts ▶ S Grants receivable B Receivables due from officers, directors, trustless, and other disqualified persons 7 Directors and summariant Less, allowance for doubtful accounts ▶ 10 Investments of sale or use 11 Investments - Corporate bonds 12 Investments - Corporate bonds 13 Investments - Corporate bonds 14 Land, buildings, and equipment base ▶ 15 Total assets (discrede ▶ 16 Total assets (close completed by all titlers - see the investments - Corporate bonds 16 Total assets (close completed by all titlers - see the investments - Allowance - Corporate bonds 17 Accounts payable and account expenses 18 Grants payable 19 Deferred revenue 20 Lessans - Investments - Allowance - Allowance - Corporate bonds 21 Total Iniabilities (and limes 17 through 22) 22 Lessans - Investments - Allowance			· · · · · · · · · · · · · · · · · · ·	126,630.	73,716.	73,715.
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Redgins recovable Less allowance for doubtful accounts		3	Accounts receivable			
Ests: allowance for obustrial accounts ▶ 5 Gratis receivable 6 Receivables due from officers, directors, trustees, and other obustrial depends on the control of the con] ' '		Ì
S Grafts reservable 6 Received between the month officers, directors, trustates, and other disqualified persons 7 Diversity and success the month officers of use 9 Prepared expenses and deferred charges 10s Investments - compares took 1 Investments - compares bonds 1 Investment		4	Pledges receivable ►		•	
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Newstreams or sale or use 9 Prepad expenses and detered charges 10a Investments - Corporate stock c Investments - Corporate s		'		1		
Prepad expenses and deferred charges 10a Investments - U.S. and state government obligations b Investments - corporate bonds c Investments - corporate bonds 11 Investments - ordinaria and reparent basis 12 Investments - ordinaria and reparent basis 13 Investments - ordinaria and reparent basis 14 Land, buildings, and equipment basis 15 Investments - ordinaria and equipment basis 16 Total assets (to be completed by all fairs - see the instructions. Also, see page 1, item 1) 16 Total assets (to be completed by all fairs - see the instructions. Also, see page 1, item 1) 17 Accounts payable and accrued expenses 18 Grants payable 19 Deferred revenes 20 Lones bom officers. Also, see page 1, item 1) 21 Mortgages and other notes payable 22 Under fabilities (add lines 17 through 22) 22 Under fabilities (add lines 17 through 22) 23 Total liabilities (add lines 17 through 22) 24 Foundations that do not follow SFAS 117, check here and complete lines 24 through 28 and lines 30 and 31. 25 Perumanently restricted 26 Foundations that do not follow SFAS 117, check here and complete lines 24 through 31. 27 Capital stock, trust principal, or current funds 28 Perumanently restricted 29 Perumanently restricted 29 Perumanently restricted 20 Perumanently restricted 20 Perumanently restricted 21 Total net assets or fund balances 22 Paud-in or capital surplus, or and, blidg., and equipment fund 23 Total liabilities and net assets or fund balances 21 Total net assets or fund balances at beginning of year - Part III, column (a), line 30 21 Total net assets or fund balances at beginning of year - Part III, column (b), line 30 22 Citter amount from Part I, line 27a 33 Other increases on included in line 2 (termize) 34 Add lines 1, 2, and 3 35 Obercaeses not included in line 2 (termize) 35 Obercaeses not included in line 2 (termize) 36 October assets or fund balances at end of year (line 4 minus line 5) - Part III, column (b), line 30 37 October lines 2 through 31 October 10 October 31 October 32 October 33 October 34 October 34 October 34		۱				
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11			•			
12 Investments - mortgage loans 13 Investments - other mortgage loans 14 Land, buildings, and equipment basis		۱		ļ.		
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15 Other assets (describe ▶ 16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I) 845,005. 807,993. 895,148. 17 Accounts payable and accrued expenses 6 Grants payable 19 Deferred revenue 20 Learn from officers, directors, trustees, and other disqualified persons 21 Mortgages and other notes payable 20 Cother Inabilities (accrube ▶ 20 Cother Inabilit		14			<u> </u>	i i i i i i i i i i i i i i i i i i i
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24 Unrestricted 25 Temporarily restricted 26 Permanently restricted 27 Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. 28 Pard-in or capital surplus, or land, bldg., and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 30 Total net assets or fund balances 31 Total liabilities and net assets/fund balances 31 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) 30 Other increases not included in line 2 (itemize) 31 Add lines 1, 2, and 3 32 Decreases not included in line 2 (itemize) 33 Decreases not included in line 2 (itemize) 34 Add lines 1, 2, and 3 55 Decreases not included in line 2 (itemize) 55 O. 65 Total net assets or fund balances at end of year (line 4 minus line 5) - Part III, column (b), line 30 66 807, 993.						
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(must agree with end-of-year figure reported on prior year's return)1845,005.2Enter amount from Part I, line 27a2<37,012.>3Other increases not included in line 2 (itemize)30.4Add lines 1, 2, and 34807,993.5Decreases not included in line 2 (itemize)50.6Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 306807,993.	Pi	art	HI Analysis of Changes III Net Assets of Fund Ba	liances		
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Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30 6 807, 993.						
	6	T <u>ot</u> al	net assets or fund balances at end of year (line 4 minus line 5) - Part II. co	lumn (b), line 30		
						Form 990-PF (2016)

Page 3

SALES - SEE ATTACHED CAPITAL GAINS DIVIDENDS (e) Gross sales price (f) Depreciation allowed (or allowable) (or allowable) (g) Cost or other basis plus expense of sale 435,223. 434,814. 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 (ii) F.M.V. as of 12/31/69 (iii) F.M.V. as of 12/31/69 (iv) Adjusted basis (k) Excess of col. (i) over col. (j), if any a b c	D - Donation P	(h) Gain o (e) plus (f) r	r (loss) minus (g) 40 3,74 n) gain minus ss than -0-) or
c d e (e) Gross sales price (f) Depreciation allowed (or allowable) (g) Cost or other basis plus expense of sale 4 34,814. 5 3,747. c d e 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 (k) Excess of col. (i) over col. (j), if any a b c	•	(e) plus (f) r	1) gain minus ss than -0-) or
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	 		40
	 		3,74
			<u>J,14</u>
i I	+		
	 		
	$\overline{}$		
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		4,15
•	′ - 		
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).	1 1		
If (loss), enter -0- in Part I, line 8	} 3		N/A
art V Qualification Under Section 4940(e) for Reduced Tax on Net Inv	vestment ir	ncome	
s the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? /es," the foundation does not qualify under section 4940(e). Do not complete this part.	13		Yes X
Enter the appropriate amount in each column for each year; see the instructions before making any entries			
	ies.		
(a) Base period years Calendar year (or tax year beginning in) Adjusted qualifying distributions Net value of nonch	(c) charitable-use ass	(00%	(d) Distribution ratio (b) divided by col. (c))
(a) Base period years Calendar year (or tax year beginning in) Adjusted qualifying distributions Net value of nonching to the value of nonching to	(c) charitable-use ass 925,9	52.	(b) divided by col. (c)) • 0585
(a) Base period years Calendar year (or tax year beginning in) 2015 2014 (b) Adjusted qualifying distributions Net value of nonching the period years and the period year (or tax year beginning in) Adjusted qualifying distributions 2015 39,849.	925,9 946,7	52. 74.	(b) divided by col. (c)) • 0585 • 0420
(a) Base period years Calendar year (or tax year beginning in) 2015 2014 2013 (b) Adjusted qualifying distributions Net value of nonching the period years and period year (or tax year beginning in) Adjusted qualifying distributions 94, 223. 39,849.	925, 9 946, 7 883, 8	52. 74.	(b) divided by col. (c)) • 0585 • 0420 • 0411
(a) Base period years Calendar year (or tax year beginning in) 2015 2014 2013 2012 (b) Adjusted qualifying distributions Net value of nonching the period years of the period year (or tax year beginning in) Adjusted qualifying distributions 154,223. 2014 39,849. 2013 36,340.	925,99 946,7 883,8 802,7	52. 74. 67.	(b) divided by col. (c) . 0585 . 0420 . 0411 . 0398
(a) Base period years Calendar year (or tax year beginning in) 2015 2014 2013 (b) Adjusted qualifying distributions Net value of nonching the period years and period year (or tax year beginning in) Adjusted qualifying distributions 94, 223. 39,849.	925, 9 946, 7 883, 8	52. 74. 67.	(b) divided by col. (c)) • 0585 • 0420 • 0411
(a) Base period years Calendar year (or tax year beginning in) 2015 2014 2013 2012 2011 2011 2011 2011 2011 2011	925,99 946,7 883,8 802,7	52. 74. 67. 67.	(b) divided by col. (c))
(a) Base period years Calendar year (or tax year beginning in) 2015 2014 2013 2012 2012 2011 Total of line 1, column (d) (b) Adjusted qualifying distributions Net value of nonching distributions Net value of	925,9 946,7 883,8 802,7 795,2	52. 74. 67.	(b) divided by col. (c) . 0585 . 0420 . 0411 . 0398
(a) Base period years Calendar year (or tax year beginning in) Adjusted qualifying distributions 2015 54,223. 2014 39,849. 2013 36,340. 2012 31,965. 2011 26,832. Total of line 1, column (d) Adjusted qualifying distributions Net value of nonching to the serious distributions Net value of nonching to the value of no	925,9 946,7 883,8 802,7 795,2	52. 74. 67. 67. 43.	(b) divided by col. (c))
(a) Base period years Calendar year (or tax year beginning in) 2015 2014 2013 2012 2012 2011 Total of line 1, column (d) (b) Adjusted qualifying distributions Net value of nonching distributions Net value of	925,9 946,7 883,8 802,7 795,2	52. 74. 67. 67.	(b) divided by col. (c))
Base period years Calendar year (or tax year beginning in) Adjusted qualifying distributions 2015 2014 39,849. 2013 36,340. 2012 2011 2	925,9 946,7 883,8 802,7 795,2	52. 74. 67. 67. 43.	(b) divided by col. (c) . 0585 . 0420 . 0411 . 0398 . 0337 . 2153
(a) Base period years Calendar year (or tax year beginning in) Adjusted qualifying distributions 2015 2014 39,849. 2013 36,340. 2012 31,965. 2011 26,832. Total of line 1, column (d) Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of y the foundation has been in existence if less than 5 years	925,9 946,7 883,8 802,7 795,2	52. 74. 67. 67. 43.	(b) divided by col. (c))
Base period years Calendar year (or tax year beginning in) Adjusted qualifying distributions 2015 2014 39,849. 2013 36,340. 2012 31,965. 2011 Total of line 1, column (d) Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of y the foundation has been in existence if less than 5 years Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	925,9 946,7 883,8 802,7 795,2	52. 74. 67. 67. 43.	(b) divided by col. (c))
Base period years Calendar year (or tax year beginning in) Adjusted qualifying distributions 2015 2014 39,849. 2013 36,340. 2012 31,965. 2011 Total of line 1, column (d) Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of y the foundation has been in existence if less than 5 years Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	925,9 946,7 883,8 802,7 795,2	52. 74. 67. 67. 43.	(b) divided by col. (c) . 0585 . 0420 . 0411 . 0398 . 0337 . 2153
Base period years Calendar year (or tax year beginning in) Adjusted qualifying distributions 2015 2014 39,849. 2013 36,340. 2012 31,965. 2011 26,832. Total of line 1, column (d) Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of y the foundation has been in existence if less than 5 years Enter the net value of noncharitable-use assets for 2016 from Part X, line 5 Multiply line 4 by line 3	925,9 946,7 883,8 802,7 795,2	52. 74. 67. 67. 43.	(b) divided by col. (c))
Base period years Calendar year (or tax year beginning in) 2015 2014 39,849. 2013 36,340. 2012 31,965. 2011 2011 2013 Adjusted qualifying distributions Sequence of the sequence of year base period - divide the total on line 2 by 5, or by the number of year base period - divide the total on line 2 by 5, or by the number of year base period - divide the total on line 2 by 5, or by the number of year base period - divide the total on line 2 by 5, or by the number of year base period - divide the total on line 2 by 5, or by the number of year base period - divide the total on line 2 by 5, or by the number of year base period - divide the total on line 2 by 5, or by the number of year base period - divide the total on line 2 by 5, or by the number of year base period - divide the total on line 2 by 5, or by the number of year base period - divide the total on line 2 by 5, or by the number of year base period - divide the total on line 2 by 5, or by the number of year base period - divide the total on line 2 by 5, or by the number of year base period - divide the total on line 2 by 5, or by the number of year base period - divide the total on line 2 by 5, or by the number of year base period - divide the total on line 2 by 5, or by the number of year base period - divide the total on line 2 by 5, or by the number of year base period - divide the total on line 2 by 5, or by the number of year base period - divide the total on line 2 by 5, or by the number of year base period - divide the total on line 2 by 5, or by the number of year base period - divide the total on line 2 by 5, or by the number of year base period - divide the total on line 2 by 5, or by the number of year base period - divide the total on line 2 by 5, or by the number of year base period - divide the total on line 2 by 5, or by the number of year base period - divide the total on line 2 by 5, or by the number of year base period - divide the total on line 2 by 5, or by the number of year base period - divide the total on line 2 by 5, or	925,9 946,7 883,8 802,7 795,2	52. 74. 67. 67. 43.	(b) divided by col. (c))
Base period years Calendar year (or tax year beginning in) Adjusted qualifying distributions 2015 2014 39,849. 2013 36,340. 2012 31,965. 2011 26,832. Total of line 1, column (d) Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of y the foundation has been in existence if less than 5 years Enter the net value of noncharitable-use assets for 2016 from Part X, line 5 Multiply line 4 by line 3 Enter 1% of net investment income (1% of Part I, line 27b)	925,9 946,7 883,8 802,7 795,2	52. 74. 67. 67. 43.	(b) divided by col. (c) . 0585 . 0420 . 0411 . 0398 . 0337 . 2153 . 0430 856,59 36,88
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Base period years Calendar year (or tax year beginning in) Adjusted qualifying distributions 2015 2014 39,849. 2013 36,340. 2012 2011 2	925,9 946,7 883,8 802,7 795,2	52. 74. 67. 67. 43.	(b) divided by col. (c) 0585 0420 0411 0398 0337 2153 0430 856,59 36,88
Base period years Calendar year (or tax year beginning in) Adjusted qualifying distributions 2015 2014 39,849. 2013 36,340. 2012 31,965. 2011 26,832. Total of line 1, column (d) Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of y the foundation has been in existence if less than 5 years Enter the net value of noncharitable-use assets for 2016 from Part X, line 5 Multiply line 4 by line 3 Enter 1% of net investment income (1% of Part I, line 27b)	(c) haritable-use ass 925,9 946,7 883,8 802,7 795,2	52. 74. 67. 67. 43.	(b) divided by col. (c) . 0585 . 0420 . 0411 . 0398 . 0337 . 2153 . 0430 856,59 36,88

HERBERT & ROSALIE GOLDBERG

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), or 4940(c), or 4948 - see instructions) Its Exompt comrang from dention sectors due to section 4940(c)(c), chack here	_	990-PF (2016) FAMILY FOUNDATION INC	30-	-0127	167		Page 4
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(1) On the foundation. ▶ \$		·			۳-	(k . /	
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ 0.2 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 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 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? b if Yes," has it filed a tax return on Form-990-T for this year? filed a tax return on Form-990-T for this year? 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 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? 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 8a Enter the states to which the foundation reports or with which it is registered (see instructions) PA, 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 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 X 10 Did any persons become substantial contributors during the tax year? If "Yes," expended betting they names and addresses	Ĭ				 		χ,
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	10						
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P	art VII-A Statements Regarding Activities (continued)	107		raye 5
<u></u>	otatements Regarding Activities (continued)	т —	Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of		, 63	
•	section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		х
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges?	<u> </u>		
	If "Yes," attach statement (see instructions)	12		Х
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Х	
	Website address ► N/A			
14				
	Located at ► 102 COPPLES LANE, WALLINGFORD, PA ZIP+4 ►19	<u>}086</u>	-64	31_
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	
16	, , , , , , , , , , , , , , , , , , , ,		Yes	No
	securities, or other financial account in a foreign country?	16	L	<u>X</u>
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the			
Pá	foreign country art 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.	T	Yes	No
18	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?			,
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)			
	a disqualified person?			\$.
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	`		***
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?		> 40.	*
	(5) Transfer any income or assets to a disqualified person (or make any of either available			٠. Ž
	for the benefit or use of a disqualified person)?	Mary 4		(· ś
	(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.)		, \$	
t	olf 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?	١.,		X
,	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation	1c	180	
۲,	defined in section 4942(j)(3) or 4942(j)(5));	ς ,		
8	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 X No			3
	If "Yes," list the years	%	ŀ	`
t	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		<u> </u>	Ì
	statement - see instructions.) N/A	2b		<u> </u>
C	lf the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.	72 (S)		
	b Indiction the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time	1		. ś.
38	· · · · · · · · · · · · · · · · · · ·	4. 5	3 35	
	during the year?	ŷ.	. 4 ⁽⁶⁾	
t	olf "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	—-	
	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	 	X
t	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?			x
		4b orm 99	0-PF	
	r	ли ээ	7-F I	(2010)

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

HERBERT & ROSALIE GOLDBERG

	<u>-012716'</u>	7 Page 7
Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)		
3 Five highest-paid independent contractors for professional services. If none, enter "NONE."		
(a) Name and address of each person paid more than \$50,000 (b) Type of service	(c)	Compensation
NONE		
Table purples of others year upon the CEO 000 for an elemental and	•	0
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	T	
number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Exp	enses
1 N/A		
	٦	
	1	
2		
	_	
3	4	
	-	
A	+	
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.	Am	ount
1 N/A		
	_	
2	4	
	\dashv	
All other program-related investments. See instructions.	+	
3		
	┪	
	7	
Total. Add lines 1 through 3		0.
	Form 9	90-PF (2016)

1 01	m sso-r (2018) FAMIDI FOUNDATION INC	30-012/16/	Page 8
P	art X Minimum Investment Return (All domestic foundations must complete this part. Foreign four	ndations, 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 734	<u>,669.</u> ,973.
b	Average of monthly cash balances	1b 134	,973.
C	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d 869	,642.
е	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	3 869	,642.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4 13	,045.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5 856	,597.
6	Minimum investment return. Enter 5% of line 5		,830.
P	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations are	nd certain	
	foreign organizations check here 🕨 🔲 and do not complete this part.)		
1	Mınımum investment return from Part X, line 6	1 42	,830.
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	90.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3 42	,740.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5 42	,740.
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		,740.
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		,996.
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 45	,996.
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	90.
6	Adjusted qualifying distributions. Subtract line 5 from line 4		,906.
	Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation of		-
	4940(e) reduction of tax in those years.		

Form **990-PF** (2016)

Part XIII	Undistributed Income	(see instructions)
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	(a) Corpus	(b) Years prior to 2015	(c) 2015	(d) 2016
1 Distributable amount for 2016 from Part XI,				-
line 7				42,740.
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only			42,825.	
b Total for prior years:				
		0.		
3 Excess distributions carryover, if any, to 2016:				
a From 2011	4			
b From 2012	4			
c From 2013	4			
d From 2014	4			
e From 2015				1
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2016 from	:			**
Part XII, line 4: ►\$ 45,996	'- 	,	40 00E	
a Applied to 2015, but not more than line 2a	* *, * .		42,825.	<u> </u>
b Applied to undistributed income of prior	" X 2 " Y	0.		
years (Election required - see instructions)		U•	** *	1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
c Treated as distributions out of corpus	0.	31.Ai -	* * * * * * * * * * * * * * * * * * *	
(Election required - see instructions) d Applied to 2016 distributable amount	¥ \$ \$ \$ \$ \$			2 171
e Remaining amount distributed out of corpus	0.			3,1/1.
5 Excess distributions carryover applied to 2016	0.	***********	\$ \$6.77~* \$ \$8.74	0.
(If an amount appears in column (d), the same amount				U.
must be shown in column (a)) 6 Enter the net total of each column as indicated below:				***
& Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income. Subtract			34 3, co	, .
line 4b from line 2b		0.		,
c Enter the amount of prior years'	388 335			
undistributed income for which a notice of deficiency has been issued, or on which				
the section 4942(a) tax has been previously				
assessed	<u> </u>	0.	*´ * 《 §	
d Subtract line 6c from line 6b. Taxable		_	, , , , ,	
amount - see instructions		0.	1 (A	* 45° * * * * * * * * * * * * * * * * * * *
e Undistributed income for 2015. Subtract line				
4a from line 2a. Taxable amount - see instr.	***************************************		0.	
f Undistributed income for 2016. Subtract		. Ž 13.		
lines 4d and 5 from line 1. This amount must		***		20 560
be distributed in 2017	<u> </u>	r sits .	_	39,569.
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.	N. Za		\$. **
B Excess distributions carryover from 2011		7340	3 460A	* ·
not applied on line 5 or line 7	0.	· Ž.		
9 Excess distributions carryover to 2017.	•	no. 4 300	7 1 1	× · · · · · · · · · · · · · · · · · · ·
Subtract lines 7 and 8 from line 6a	0.			
D Analysis of line 9:	15 1 200	·	*	* -
a Excess from 2012		* *	**	1
b Excess from 2013				, . 4
c Excess from 2014			, , , , , ,	ilā
d Excess from 2015		\$ \$ \$ \$		
e Excess from 2016	* * * * * * * * * * * * * * * * * * *	<i>*</i> *	* * * * * * * * * * * * * * * * * * * *	

623581 11-23-16

Form **990-PF** (2016)

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).)

DR. HERBERT I. GOLDBERG

(3) Largest amount of support from an exempt organization

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 **X** 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:

Form **990-PF** (2016)

Part XV Supplementary Informa 3 Grants and Contributions Paid During t		Davenant	Ţ	
Recipient	If recipient is an individual		1	 -
Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of	Purpose of grant or contribution	Amount
	or substantial contributor	recipient		
Paid during the year				
SEE ATTACHED SCHEDULE	NONE	OTHER PUBLIC	GENERAL	
		CHARITY		42,821
	• • •			
		<u> </u>		
				42,821
Total		1	<u>▶ 3a</u>	42,021
b Approved for future payment		1		
NONE		1		
		<u> </u>		
	[1		

Analysis of Income-Producing Activities Part XVI-A

Enter gross amounts unless otherwise indicated.	Unrelate	ed business income	Exclu	ded by section 512, 513, or 514	(e)
enter gross amounts unless otherwise indicated.	(a) Business	(b)	(C) Exclu-	(d)	Related or exempt
1 Program service revenue:	Business code	Amount	sion	Amount	function income
	Code		-	· · · · · · · · · · · · · · · · · · ·	
å	 		†		.
b	 				
c	 				
d					
e	J		ļ		······
f					
g Fees and contracts from government agencies			ļ		· · · · · · · · · · · · · · · · · · ·
2 Membership dues and assessments					
3 Interest on savings and temporary cash	1				
investments			14	13.	
4 Dividends and interest from securities			14	15,078.	
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		
8 Gain or (loss) from sales of assets other					
than inventory			18	4,156.	
9 Net income or (loss) from special events			 _ ·		
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:			†		
å			\vdash		
b			 	·	
<u> </u>	-				
d		 .			
e	3882 \ 38882	•		10 047	
12 Subtotal. Add columns (b), (d), and (e)		<u> </u>	# 3 3:		0.
13 Total. Add line 12, columns (b), (d), and (e)				13	19,247.
(See worksheet in line 13 instructions to verify calculations.)					
Part XVI-B Relationship of Activities to	the Acco	mplishment of Exe	empt	Purposes	
Line No. Explain below how each activity for which inco			contrib	uted importantly to the accom	iplishment of
the foundation's exempt purposes (other than	by providing fur	nas for such purposes).			
					· · ·
		·			
					·····

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Form 990-PF (2016) FAMILY FOUNDATION INC 30-0127167

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

Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? Transfers from the reporting foundation to a noncharitable exempt organization of: (1) Cash (2) Other assets Other transactions: (1) Sales of assets to a noncharitable exempt organization (2) Purchases of assets from a noncharitable exempt organization (3) Rental of facilities, equipment, or other assets (4) Reimbursement arrangements (5) Loans or loan guarantees (6) Performance of services or membership or fundraising solicitations	1a(1) X 1a(2) X 1b(1) X 1b(2) X
the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? a Transfers from the reporting foundation to a noncharitable exempt organization of: (1) Cash (2) Other assets b Other transactions: (1) Sales of assets to a noncharitable exempt organization (2) Purchases of assets from a noncharitable exempt organization (3) Rental of facilities, equipment, or other assets (4) Reimbursement arrangements (5) Loans or loan guarantees (6) Performance of services or membership or fundraising solicitations	1a(1) X 1a(2) X 1b(1) X
a Transfers from the reporting foundation to a noncharitable exempt organization of: (1) Cash (2) Other assets b Other transactions: (1) Sales of assets to a noncharitable exempt organization (2) Purchases of assets from a noncharitable exempt organization (3) Rental of facilities, equipment, or other assets (4) Reimbursement arrangements (5) Loans or loan guarantees (6) Performance of services or membership or fundraising solicitations	1a(2) X 1b(1) X
 (1) Cash (2) Other assets b Other transactions: (1) Sales of assets to a noncharitable exempt organization (2) Purchases of assets from a noncharitable exempt organization (3) Rental of facilities, equipment, or other assets (4) Reimbursement arrangements (5) Loans or loan guarantees (6) Performance of services or membership or fundraising solicitations 	1a(2) X 1b(1) X
 (2) Other assets b Other transactions: (1) Sales of assets to a noncharitable exempt organization (2) Purchases of assets from a noncharitable exempt organization (3) Rental of facilities, equipment, or other assets (4) Reimbursement arrangements (5) Loans or loan guarantees (6) Performance of services or membership or fundraising solicitations 	1a(2) X 1b(1) X
 Other transactions: Sales of assets to a noncharitable exempt organization Purchases of assets from a noncharitable exempt organization Rental of facilities, equipment, or other assets Reimbursement arrangements Loans or loan guarantees Performance of services or membership or fundraising solicitations 	1b(1) X
 Sales of assets to a noncharitable exempt organization Purchases of assets from a noncharitable exempt organization Rental of facilities, equipment, or other assets Reimbursement arrangements Loans or loan guarantees Performance of services or membership or fundraising solicitations 	
 (2) Purchases of assets from a noncharitable exempt organization (3) Rental of facilities, equipment, or other assets (4) Reimbursement arrangements (5) Loans or loan guarantees (6) Performance of services or membership or fundraising solicitations 	
 (3) Rental of facilities, equipment, or other assets (4) Reimbursement arrangements (5) Loans or loan guarantees (6) Performance of services or membership or fundraising solicitations 	
 (4) Reimbursement arrangements (5) Loans or loan guarantees (6) Performance of services or membership or fundraising solicitations 	
(5) Loans or loan guarantees(6) Performance of services or membership or fundraising solicitations	
(6) Performance of services or membership or fundraising solicitations	——————————————————————————————————————
	
	
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees	<u> </u>
d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value	
or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing	j arrangement, snow 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	tanantana and sharra areasanata
	, transactions and sharing arrangements
N/A	
	·
	
	
	·
On the form date and weather a reduce the officiated with an explored to one are more two exempts are propertied.	
2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described	Yes X No
in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?	165 NO
b If "Yes," complete the following schedule. (a) Name of organization (b) Type of organization (c) Description	ption of relationship
N/A	paon of rolationsing
N/A	·
	
	
	· · · · · · · · · · · · · · · · · · ·
Under penaltyso of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my known	owledge
Sign and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any know	vledge return with the preparer
Here Days a Rack 19/19 17 Pres Track	shown below (see instr.)? X Yes No
Signature of officer or trustee Date Title	X Yes No
Print/Type preparer's name Preparer's synature Date Check	ıf PTIN
Printo Type preparer's name Preparer's signature signatu	'
Paid PETER NUSSBAUM 16 16 16 16 16 16 16 16 16 16 16 16 16	P00294707
I BIBIC NOBBERION	FIN ►13-1459550
Use Only	TIN E TO-TADADO
Firm's address ► 135 WEST 50TH STREET	
NEW YORK, NY 10020-0002 Phone	no. (212) 812-7000 _
I HEW TORK, 141 TOOZO OOOZ PHONE	Form 990-PF (2016)

FYE 12/31/2016 EIN: 30-0127167

PART II:

HERBERT & ROSALIE GOLDBERG FAMILY FOUNDATION INC

BALANCE SHEETS

Schedule G

Balance On Hand

		Market Value 12/31/2016	I	nventory Value
	Cash and Cash Equivalents			
	UBS - TS 62745	\$ 44,437.47	\$	44,437.47
	UBS - TS 63546	29,278.04		29,278.04
	Total Cash and Cash Equivalents	\$ 73,715.51	\$	73,715.51
No. of Shares	Stocks			
100	ACCELERATE DIAGNOSTICS INC	\$ 2,075.00	\$	1,275.29
60	ACCELERON PHARMA INC	1,531.20		1,898.50
65	ALBEMARLE CORP	5,595.20		5,918.65
25	ALNYLAM PHARMACEUTICALS INC	936.00		1,940.85
10	AMAZON.COM INC	7,498.70		5,408.02
50	ANADARKO PETROLEUM CORP	3,486.50		4,035.38
1,000	ARCH CAPITAL GROUP LTD 5.25%	21,130.00		21,594.47
1,000	ARCH CAPITAL GROUP LTD 6.75%	25,170.00		25,000.00
150	AT&T INC	6,379.50		6,243.00
300	BANK OF AMERICA CORP	6,630.00		4,955.67
235	BAXTER INTL INC	10,419.90		8,910.73
500	BAXTER INTL INC - 45	22,170.00		22,922.44
25	BIOMARIN PHARMACEUTICAL INC	2,071.00		2,174.00
100	BRISTOL MYERS SQUIBB CO	5,844.00	•	4,227.66

		Market Value 12/31/2016	I	nventory Value
No. of Shares	Stocks			
1	CALIFORNIA RES. CORP	\$ 21.29	\$	57.35
85	CBS CORP NEW CL B	5,407.70		4,411.50
40	CELGENE CORP	. 4,630.00		4,780.08
75	COLFAX CORP	2,694.75		4,765.90
175	CSX CORP	6,287.75		4,591.17
35	DEXCOM INC	2,089.50		2,295.44
250	DISCOVERY COMMUNICATIONS INC SER C	6,695.00		7,471.26
65	DISH NETWORK CORP CL A	•		·
		3,765.45		3,024.44
100	DU PONT DE NEMOURS	7,340.00		4,090.82
500	FIRST TR EUROPE ALPHADEX ETF	14,592.50		16,360.08
210	FREEPORT-MCMORAN INC	2,769.90		2,982.61
325	GENERAL ELECTRIC CO	10,270.00		7,865.00
500	GENL ELECTRIC CO	15,800.00		15,891.52
75	GENL MILLS INC	4,632.75		4,421.25
825	GUGGENHEIM S&P 500 EQUAL WEIGHT ETF	71,478.00		50,269.50
50	HERSHEY CO	5,171.50		4,794.20
200	ISHARES RUSSELL 2000 ETF	26,970.00		21,015.00
50	ISHARES TRANS AVERAGE DE	8,142.00		7,396.02
1,000	KKR & CO LP 6.750%	25,280.00		25,000.00
50	LYONDELLBASELL INDUSTRIES NV	4,289.00		4,615.00
100	MCDONALDS CORP	12,172.00		12,462.99

			Market Value 12/31/2016	I	nventory Value
No. of Shares	Stocks				
. 75	MEDTRONIC PLC	\$	5,342.25	\$	5,437.63
85	MERCK & CO INC		5,003.95		4,472.42
50	NORFOLK STHN CORP		5,403.50		5,444.95
225	NOVADAQ TECHNOLOGIES INC	·	1,595.25		2,832.75
35	OCCIDENTAL PETROLEUM CRP		2,493.05		2,744.06
45	PEPSICO INC		4,708.35		3,411.59
275	PFIZER INC - UBS		8,932.00		7,432.30
100	ROYAL DUTCH SHELLPLC CL A		5,438.00		6,847.92
40	SPDR GOLD TRUST DE		4,384.40		4,441.03
420	SPDR S&P 500 ETF TR		93,882.60		90,615.59
500	SPDR S&P MIDCAP 400 EFT TR	•	150,865.00		127,913.51
265	SPDR S&P OIL & GAS EXP		10,976.30		9,420.25
200	STARBUCKS CORP		11,104.00		5,030.63
100	TEJON RANCH CO		2,543.00		2,796.42
1,000	TWITTER INC		16,300.00		19,104.27
1,000	UBS AG L/O		9,340.00		10,000.00
100	VANECK VECTORS AGRIBUSINESS ETF		5,134.00		4,847.82
50	VANGUARD TOTAL STOCK MKT ETF		5,766.00		5,411.54
45	WALT DISNEY CO		4,689.90		4,506.60
200	WALT DISNEY CO		20,844.00		19,994.38
	Total Stocks	\$	736,181.64	\$	667,771.45

		Market Value 12/31/2016	I	nventory Value
No. of Shares	Mutual Funds			
3,171.534	JPMORGAN TR I US LARGE CAP CORE	\$ 85,250.83	\$	66,505.72
	Total Mutual Funds	\$ 85,250.83	<u>\$</u>	66,505.72
	Total Schedule G	\$ 895,147.98	\$	807,992.68

FYE 12/31/2016

EIN: 30-0127167

HERBERT & ROSALIE GOLDBERG FAMILY FOUNDATION INC

PART IV: CAPITAL GAINS AND

Schedule A-1

LOSSES FOR TAX ON

Statement of Increases on Sales, Liquidation or Distribution

INVESTMENT INCOME

		Proceeds or Distribution Value		Inventory Value		Increase
Capital Gain D	Distributions					
JPMORGAN T CORE	TR I US LARGE CAP					
12/15/2016		\$	3,746.62 \$	0.00	\$	3,746.62
	Total Capital Gain Distributions	\$	3,746.62 \$	0.00	\$	3,746,62
Retired as Wor	rthless					
OPTION CAL	LS					
03/21/2016	-10 Contracts	\$	0.00 \$	(1,325.14)	\$	1,325.14
09/21/2016	-24 Contracts		0.00	(3,263.46)		3,263.46
	Total Retired as Worthless	\$	0.00 \$	(4,588,60)	\$	4,588.60
Sales						
ADVANSIX IN	NC .	·				
10/26/2016	2 Shares	\$	32.58 \$	32.11	\$	0.47
ALPHABET II	NC CL A					
06/23/2016	9 Shares		6,387.83	5,286.26		1,101.57
AMAZON.CO	M INC					
02/04/2016	15 Shares		8,605.52	4,723.58		3,881.94
10/20/2016	10 Shares		8,138.46	3,149.05		4,989.41
BANK OF AM	ER CORP 6.625%					
07/29/2016	500 Shares		13,730.77	12,500.00		1,230.77
CISCO SYS IN	IC					
09/21/2016	1,000 Shares		29,409.10	27,284.05		2,125.05
DEXCOM INC						
10/03/2016	25 Shares		2,174.35	1,943.75		230.60
FACEBOOK I	NC CL A					
05/26/2016	55 Shares		6,403.53	4,890.35		1,513.18

		Proceeds or Distribution Value		Inventory Value	Increase
Sales					
GENERAL MO	TORS CO				
12/19/2016	125 Shares	\$	4,529.90 \$	4,499.63 \$	30.27
GOLDMAN SA 6.25% DUE 09/0	CHS GROUP INC 01/17				
06/15/2016	5,000 Par		5,306.25	4,639.00	667.25
HARTFORD FI GROUP INC	NCL SERVICES				
05/09/2016	125 Shares		5,516.82	4,566.25	950.57
HONEYWELL	INTL INC				
10/14/2016	60 Shares		6,359.86	4,904.11	1,455.75
ISHAES US AE DEFENSE INDI					
12/15/2016	35 Shares		5,004.89	4,553.87	451.02
ISHARES US O	IL GAS EXP				
10/26/2016	125 Shares		7,484.33	7,356.68	127.65
JOHNSON & JO	OHNSON - UBS				
11/28/2016	50 Shares		5,659.48	3,510.50	2,148.98
JPMORGAN CI ML-CD	HASE BANK				
02/26/2016	25,000 Par		26,110.15	25,000.00	1,110.15
KELLOGG CO					
01/15/2016	75 Shares		5,310.98	4,434.70	876.28
MEDTRONIC P	PLC				
11/16/2016	60 Shares		4,912.20	4,719.85	192.35
MERCK & CO	INC NEW				
09/14/2016	400 Shares		22,506.75	21,508.66	998.09
09/15/2016	100 Shares		5,569.62	5,377.16	192.46
PEPSICO INC					
05/18/2016	80 Shares		8,318.26	6,065.04	2,253.22

		Proceeds or Distribution Value		Inventory Value		Increase	
Sales							
SPDR S&P B	IOTECH ETF DE						
08/05/2016	85 Shares	\$	5,331.93 \$	4,152.02	\$	1,179.91	
SPDR S&P O	IL & GAS EXP						
04/14/2016	175 Shares		5,496.63	4,596.88		899.75	
TIME WARN	IER INC NEW						
10/28/2016	75 Shares		6,533.86	4,828.50		1,705.36	
	Total Sales	\$	204,834.05	174,522,00	<u>\$</u>	30,312.05	
	Total Schedule A-1	<u>\$</u>	208,580.67 \$	169,933.40	<u>\$</u>	38,647.27	

HERBERT & ROSALIE GOLDBERG FAMILY FOUNDATION INC Schedule B

Statement of Decreases Due to Sales, Liquidation, Collection, Distribution, or Uncollectibility

		Proceeds or Distribution Value		Inventory Value	Decrease
Retired as Wort	hless				
WTS TEJON R. 08/31/16	ANCH CO EXP				
09/19/2016	15 Shares	\$	0.00 \$	41.10	\$ 41.10
	Total Retired as Worthless	\$	0.00 \$	41.10	\$ 41.10
Sales					
ABBOTT LABS					
02/02/2016	165 Shares	\$	6,061.28 \$	7,577.66	\$ 1,516.38
ADVANSIX INC	C				
10/03/2016	0.4 Shares		5.95	6.42	0.47
BOEING CO					
04/26/2016	35 Shares		4,600.38	4,644.50	44.12
CALIFORNIA I	RES. CORP				
06/02/2016	0.7 Shares		10.90	40.15	29.25
CALIFORNIA I	RESOURCES CORP				
03/24/2016	0.276 Shares		0.33	1.58	1.25
COMCAST CO	RP NEW CL A				
03/23/2016	500 Shares		28,174.12	32,067.26	3,893.14
DISH NETWOR	RK CORP CL A				
01/29/2016	65 Shares		3,058.65	4,647.54	1,588.89
ENERGY SECT	OR SPDR TRUST				
03/22/2016	500 Shares		29,409.10	32,360.24	2,951.14
FEDEX CORP					
05/10/2016	30 Shares		4,824.40	4,855.57	31.17
FIRST TRUST SE EUROPEAN SE INCOME FUND	LECT DIVID				
05/18/2016	1,000 Shares		12,086.48	13,874.73	1,788.25

		Proceeds or Distribution Value		In	ventory Value		Decrease
Sales							
LILLY ELI & C	0						
11/29/2016	50 Shares	\$	3,230.93	\$ 4	,210.44	\$	979.51
MCDONALDS (CORP - 46						
10/20/2016	35 Shares		3,928.08	4	,369.45		441.37
MERCK & CO	INC						
03/04/2016	65 Shares		3,275.28	3	,420.09		144.81
OPTION CALL	S						
02/18/2016	5 Contracts		789.64		789.64		0.00
02/18/2016	5 Contracts		535.50		535.50		0.00
07/29/2016	24 Contracts		3,263.46	3	,263.46		0.00
SPDR INDEX SI STOXX 50 ETF	HS FDS EURO						
11/30/2016	1,000 Shares		30,878.22	39	,728.25		8,850.03
SPDR S&P 500 1	ETF TR						
06/17/2016	30 Shares		6,224.65	ć	5,256.14		31.49
TEKLA WORL	D HEALTHCARE						
05/18/2016	1,500 Shares		20,725.00	30	,000.00		9,275.00
UNTS AAM DIV	RULER COV						
01/26/2016	2,515 Shares		21,577.95	24	,309.48		2,731.53
US CONCRETE	INC						
04/04/2016	75 Shares		4,488.23	4	1,621.47		133.24
VANGUARD TO ETF	OTAL STOCK MKT						
09/15/2016	400 Shares		43,240.79	43	3,292.29		51.50
	Total Sales	\$	230,389.32	\$ 264	.871.86	\$	34,482.54
	Total Schedule B	<u>\$</u>	230,389.32	<u>\$ 264</u>	<u>,912.96</u>	<u>\$</u>	34,523.64

FYE 12/31/2016

EIN: 30-0127167

HERBERT & ROSALIE GOLDBERG FAMILY FOUNDATION INC

PART XV: HERBERT & R
GRANTS AND CONTRIBUTIONS

Schedule E

PAID DURING THE YEAR OR

Distributions

APPROVED FOR FUTURE PAYMENT

Die	trib	ution	Val	116
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ACADEMY OF	VOCAL ARTS			
02/02/2016	Cash	\$ 5,000.00		
Total To Or For	Beneficiary		\$ 5,00	00.00
ART HEDGERO	OW THEATRE			
03/31/2016	Cash	\$ 400.00		
04/21/2016	Cash	100.00		
Total To Or For	Beneficiary		\$ 50	00.00
BOCA RATON SOCIETY	HISTORICAL			
02/11/2016	Cash	\$ 4,000.00		
Total To Or For	Beneficiary		\$ 4,00	00.00
BOCA RATON HOSPITAL	REGIONAL			
04/21/2016	Cash	\$ 1,200.00		
Total To Or For	Beneficiary		\$ 1,20	00.00
CENTER FOR I	NQUIRY INC			
12/13/2016	Cash	\$ 240.00		
Total To Or For	Beneficiary		\$ 2	40.00
COLLEGE OF	PHYSICIANS			
01/20/2016	Cash	\$ 375.00		
Total To Or For	Beneficiary		\$ 3	75.00
COLLINS FDT	7			
02/08/2016	Cash	\$ 900.00		
Total To Or For	Beneficiary		\$. 9	00.00
CYSTIC FIBRO	SIS FTDN			
03/07/2016	Cash	\$ 6,400.00		
Total To Or For	Beneficiary		\$ 6,4	00.00

		Distribution Value			
FLORENCE FU	LLER CENTER				
05/03/2016	Cash	\$	250.00		
Total To Or For	Beneficiary			\$	250.00
GIVESMART U	IS INC				
03/24/2016	Cash	\$	200.00		
03/24/2016	Cash		250.00		
Total To Or For	Beneficiary			S	450.00
JLBR WVOY					
02/16/2016	Cash	\$	600.00		
05/04/2016	Cash		157.00		
Total To Or For	Beneficiary			\$	757.00
KIMMEL CENT	TER INC				
09/06/2016	Cash	\$	500.00		
Total To Or For	Beneficiary			\$	500.00
LONGWOOD G	SARDENS				
12/13/2016	Cash	\$.	195.00		
Total To Or For	Beneficiary			\$	195.00
N E FOCAL PO	INT CASA INC				
03/29/2016	Cash	\$	1,000.00		
Total To Or For	Beneficiary			\$	1,000.00
NAMI	,				
12/12/2016	Cash	\$	100.00		
Total To Or For	Beneficiary			\$	100.00
NORTHEAST F	ORAL POINT				
05/27/2016	Cash	\$	850.00		
Total To Or For	Beneficiary			\$	850.00
PAFA					
01/21/2016	Cash	\$	450.00		
04/01/2016	Cash		1,000.00		
Page 2		(2.4)			

		Dist	ribution Value		
PAFA (Continue	ed)				
Total To Or For	Beneficiary			S	1,450.00
PATRON FILM	ADELPHIA				
12/05/2016	Cash	\$	2,500.00		
Total To Or For	Beneficiary			\$	2,500.00
PENN MUSEUM	A				
12/13/2016	Cash	\$	250.00		
Total To Or For	Beneficiary			\$	250.00
PHILADELPHI	A FOLKSONG				
07/21/2016	Cash	\$	750.00		
Total To Or For	Beneficiary			\$	750.00
PHILADELPHI ART	A MUSEUM OF				
08/09/2016	Cash	\$	2,500.00		
11/03/2016	Cash		253.50		
Total To Or For	Beneficiary			\$	2,753.50
PMA CRAFT S	HOW				
05/31/2016	Cash	\$	500.00		
Total To Or For	Beneficiary			\$	500.00
SAFE SUN					
01/25/2016	Cash	\$	530.00		
Total To Or For	Beneficiary			\$	530.00
SPLC					
12/13/2016	Cash	\$	325.00		
Total To Or For	Beneficiary			\$	325.00
ST MARKS					
02/09/2016	Cash	\$	3,600.00		
Total To Or For	Beneficiary			\$	3,600.00

	Distribution Value				
STAY TRUE					
05/26/2016	Cash	\$	3,000.00		
Total To Or Fo	r Beneficiary			\$	3,000.00
THE BARNES	FOUNDATION				
07/20/2016	Cash	\$	495.00		
Total To Or Fo	r Beneficiary			\$	495.00
THE BRYN MA	AWR THEATRE				
04/11/2016	Cash	\$	1,000.00		
Total To Or Fo	r Beneficiary			\$	1,000.00
THE CHILDRI	EN'S HEALING				
02/16/2016	Cash	\$	150.00		
Total To Or Fo	r Beneficiary			\$	150.00
THE JUNIOR	LEAGUE OF BOCA				
02/03/2016	Cash	\$	500.00		
Total To Or Fo	r Beneficiary			\$	500.00
TYLER ARBO	RETUM				
06/01/2016	Cash	\$	200.00		
12/05/2016	Cash		300.00		
Total To Or Fo	r Beneficiary			\$	500.00
UNIVERSITY PENNSYLVAN					
03/22/2016	Cash	\$	300.00		
Total To Or Fo	r Beneficiary			\$	300.00
WALNUT STR	REET THEATRE				
09/21/2016	Cash	\$	1,000.00		
Total To Or Fo	r Beneficiary			\$	1,000.00
WXPN					

Distribution Value

11/12/DN1 / 6				
WXPN (Cont	inued)			
07/19/2016	Cash	\$	500.00	
Total To Or l	For Beneficiary		\$	500.00
Total Distributions to Beneficiaries			\$	42,820.50
Total Distrib	utions		<u>\$</u>	42,820.50

FORM 990-PF INTERE	ST ON SAVI	NGS AND TEM	PORARY CAS	H INVESTMENT	rs statement 1
SOURCE		(A REVEI PER BO	NUE NE'	(B) I INVESTMENT INCOME	(C) T ADJUSTED NET INCOME
UBS - TS 62745 UBS - TS 63546			11.	11.	
TOTAL TO PART I, LI	NE 3		13.	13.	
FORM 990-PF	DIVIDEND	S AND INTER	EST FROM S	ECURITIES	STATEMENT 2
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVEN S PER BO		/EST- ADJUSTED
UBS DIVIDENDS UBS INTEREST	18,578 247	•		831. 14, 247.	,831. 247.
TO PART I, LINE 4	18,825	3,74	7. 15,	078.	,078.
	 				
FORM 990-PF		ACCOUNTI	NG FEES		STATEMENT 3
DESCRIPTION		(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME		
WEISERMAZARS LLP	_	6,150.	3,0	75.	3,075.
TO FORM 990-PF, PG	1, LN 16B	6,150.	3,0	75.	3,075.
FORM 990-PF		TAX	ES	·	STATEMENT 4
DESCRIPTION		(A) EXPENSES PER BOOKS	(B) NET INVES MENT INCO		TED CHARITABLE
FOREIGN TAX WITHHEI	-D	76.		76.	0.
TO FORM 990-PF, PG	1, LN 18	76.		76.	0.
	=				

FORM 990-PF	OTHER EXPENSES		STATEMENT 5		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
INVESTMENT EXPENSES FILING FEE	7,112.	7,112.		0.	
TO FORM 990-PF, PG 1, LN 23	7,212.	7,112.		100.	

FORM 990-PF OTHER	RINVESTMENTS		STATEMENT 6
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
STOCKS - SEE SCHEDULE G ATTACHED BONDS - SEE SCHEDULE G ATTACHED MUTUAL FUNDS - SEE SCHEDULE G	COST COST COST	667,771.	736,182.
ATTACHED	COST	66,506.	85,251.
TOTAL TO FORM 990-PF, PART II, LINE	13	734,277.	821,433.