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Form 990-PF

Department of the Treasury  
Internal Revenue Service

## Return of Private Foundation

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

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Information about Form 990-PF and its separate instructions is at [www.irs.gov/form990pf](http://www.irs.gov/form990pf).

OMB No 1545-0052

2016

Open to Public Inspection

For calendar year 2016 or tax year beginning

, and ending

Name of foundation <b>RICHARD AND JUDITH STERN FAMILY FOUNDATION</b>		A Employer identification number <b>36-4159217</b>
Number and street (or P.O. box number if mail is not delivered to street address) <b>676 NORTH MICHIGAN AVENUE</b>		B Telephone number <b>312-787-2203</b>
City or town, state or province, country, and ZIP or foreign postal code <b>CHICAGO, IL 60611</b>		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) <b>\$ 1,737,300.</b>	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	
F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>		

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received				N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments		29.	29.		STATEMENT 1
4 Dividends and interest from securities					
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10					
b Gross sales price for all assets on line 6a					
7 Capital gain net income (from Part IV, line 2)			0.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less: Cost of goods sold					
c Gross profit or (loss)					
11 Other income					
12 Total. Add lines 1 through 11		29.	29.		
13 Compensation of officers, directors, trustees, etc.		0.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 2		5,600.	0.		5,600.
c Other professional fees					
17 Interest					
18 Taxes					
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 3		25.	0.		25.
24 Total operating and administrative expenses. Add lines 13 through 23		5,625.	0.		5,625.
25 Contributions, gifts, grants paid		112,532.			112,532.
26 Total expenses and disbursements. Add lines 24 and 25		118,157.	0.		118,157.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		<118,128.>			
b Net investment income (if negative, enter -0-)			29.		
c Adjusted net income (if negative, enter -0-)				N/A	

SCANNED MAY 24 2017

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<b>Part II Balance Sheets</b> <small>Attached schedules and amounts in the description column should be for end-of-year amounts only</small>		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
<b>Assets</b>	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	334,375.	215,975.	215,975.
	3 Accounts receivable <span style="float:right">▶</span>			
	Less: allowance for doubtful accounts <span style="float:right">▶</span>			
	4 Pledges receivable <span style="float:right">▶</span>			
	Less: allowance for doubtful accounts <span style="float:right">▶</span>			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable <span style="float:right">▶</span>			
	Less: allowance for doubtful accounts <span style="float:right">▶</span>			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock			
	c Investments - corporate bonds			
	<b>Liabilities</b>	11 Investments - land, buildings, and equipment: basis <span style="float:right">▶</span>		
Less: accumulated depreciation <span style="float:right">▶</span>				
12 Investments - mortgage loans				
13 Investments - other <span style="float:right">STMT 4</span>		490,468.	490,468.	1,521,325.
14 Land, buildings, and equipment: basis <span style="float:right">▶</span>				
Less: accumulated depreciation <span style="float:right">▶</span>				
15 Other assets (describe <span style="float:right">▶</span> )				
16 <b>Total assets</b> (to be completed by all filers - see the instructions. Also, see page 1, item I)		824,843.	706,443.	1,737,300.
17 Accounts payable and accrued expenses				
18 Grants payable				
19 Deferred revenue				
20 Loans from officers, directors, trustees, and other disqualified persons				
21 Mortgages and other notes payable				
22 Other liabilities (describe <span style="float:right">▶</span> )				
23 <b>Total liabilities</b> (add lines 17 through 22)	0.	0.		
<b>Net Assets or Fund Balances</b>	Foundations that follow SFAS 117, check here <span style="float:right">▶ <input checked="" type="checkbox"/></span> and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted	824,843.	706,443.	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here <span style="float:right">▶ <input type="checkbox"/></span> and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg., and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
30 <b>Total net assets or fund balances</b>	824,843.	706,443.		
31 <b>Total liabilities and net assets/fund balances</b>	824,843.	706,443.		

**Part III Analysis of Changes in Net Assets or Fund Balances**

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	824,843.
2 Enter amount from Part I, line 27a	2	<118,128.>
3 Other increases not included in line 2 (itemize) <span style="float:right">▶</span>	3	0.
4 Add lines 1, 2, and 3	4	706,715.
5 Decreases not included in line 2 (itemize) <span style="float:right">▶</span>	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	706,715.

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**Part IV Capital Gains and Losses for Tax on Investment Income**

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
<b>1a</b>			
<b>b</b> NONE			
<b>c</b>			
<b>d</b>			
<b>e</b>			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
<b>a</b>			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
<b>a</b>			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

<b>2</b> 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 }	<b>2</b>	
<b>3</b> 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	{ }	<b>3</b>	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2015	87,664.	1,608,567.	.054498
2014	29,857.	1,805,370.	.016538
2013	8,938.	1,600,470.	.005585
2012	34,735.	1,343,695.	.025850
2011	56,218.	1,145,657.	.049071

<b>2</b> Total of line 1, column (d)	<b>2</b>	.151542
<b>3</b> Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	<b>3</b>	.030308
<b>4</b> Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	<b>4</b>	1,775,766.
<b>5</b> Multiply line 4 by line 3	<b>5</b>	53,820.
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)	<b>6</b>	0.
<b>7</b> Add lines 5 and 6	<b>7</b>	53,820.
<b>8</b> Enter qualifying distributions from Part XII, line 4	<b>8</b>	118,157.

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.

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> 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 <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	0.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	0.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	0.
6 Credits/Payments:			
a 2016 estimated tax payments and 2015 overpayment credited to 2016	6a	1,906.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	1,906.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	1,906.	
11 Enter the amount of line 10 to be: Credited to 2017 estimated tax <input checked="" type="checkbox"/> 1,906. Refunded <input type="checkbox"/>	11	0.	

**Part VII-A Statements Regarding Activities**

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ 0. (2) On foundation managers. \$ 0.		
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.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <u>IL</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	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

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**Part VII-A Statements Regarding Activities** (continued)

11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)

	Yes	No
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)

	Yes	No
12		X

13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?

	Yes	No
13	X	

Website address **N/A**

14 The books are in care of **JUDITH C. STERN**

Telephone no. **312-787-2203**

Located at **676 NORTH MICHIGAN AVENUE, CHICAGO, IL**

ZIP+4 **60611**

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year

**15** **N/A**

16 At any time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?

	Yes	No
16		X

See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country

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

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

1a During the year did the foundation (either directly or indirectly):

(1) Engage in the sale or exchange, or leasing of property with a disqualified person?

☐ Yes ☒ No

(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?

☐ Yes ☒ No

(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?

☐ Yes ☒ No

(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?

☐ Yes ☒ No

(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?

☐ Yes ☒ No

(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)

☐ Yes ☒ No

b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?

**N/A**

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?

	Yes	No
1c		X

2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)):

a At the end of tax year 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016?

☐ Yes ☒ No

If "Yes," list the years

b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.)

**N/A**

c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.

3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?

☐ Yes ☒ No

b If "Yes," did it have excess business holdings in 2016 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2016.)

**N/A**

4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?

	Yes	No
4a		X

b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2016?

	Yes	No
4b		X

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

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

- (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No
- (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No
- (3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No
- (4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions) ☐ Yes ☒ No
- (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

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

N/A  
▶ ☐

**5b**

**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

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

**6a** Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

☐ Yes ☒ No

**6b**

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

If "Yes" to 6b, file Form 8870.

**7a** At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

☐ Yes ☒ No

**7b**

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

N/A

**Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**

**1** List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
JUDITH C. STERN 676 NORTH MICHIGAN AVE. #3600 CHICAGO, IL 60611	PRESIDENT/TREASURER 0.00	0.	0.	0.
JAMES D. STERN 676 NORTH MICHIGAN AVE. #3600 CHICAGO, IL 60611	SECRETARY 0.00	0.	0.	0.
JEFFREY S. STERN 676 NORTH MICHIGAN AVE. #3600 CHICAGO, IL 60611	DIRECTOR 0.00	0.	0.	0.

**2** Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

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

0

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**Part VII. Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors** *(continued)*

**3 Five highest-paid independent contractors for professional services. If none, enter "NONE."**

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

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

**Part IX-A Summary of Direct Charitable Activities**

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

## Expenses

1	N/A	
2		
3		
4		

**Part IX-B Summary of Program-Related Investments**

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.

Amount

1	N/A	
		0.
2		
	All other program-related investments. See instructions.	
3	N/A	
		0.
Total. Add lines 1 through 3		0.

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**Part X** **Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see instructions.)

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:	
<b>a</b>	Average monthly fair market value of securities	<b>1a</b> 0.
<b>b</b>	Average of monthly cash balances	<b>1b</b> 281,483.
<b>c</b>	Fair market value of all other assets	<b>1c</b> 1,521,325.
<b>d</b>	<b>Total</b> (add lines 1a, b, and c)	<b>1d</b> 1,802,808.
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b> 0.
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b> 0.
<b>3</b>	Subtract line 2 from line 1d	<b>3</b> 1,802,808.
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	<b>4</b> 27,042.
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b> 1,775,766.
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b> 88,788.

**Part XI** **Distributable Amount** (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b> 88,788.
<b>2a</b>	Tax on investment income for 2016 from Part VI, line 5	
<b>2b</b>	Income tax for 2016. (This does not include the tax from Part VI.)	
<b>c</b>	Add lines 2a and 2b	<b>2c</b> 0.
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b> 88,788.
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b> 0.
<b>5</b>	Add lines 3 and 4	<b>5</b> 88,788.
<b>6</b>	Deduction from distributable amount (see instructions)	<b>6</b> 0.
<b>7</b>	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	<b>7</b> 88,788.

**Part XII** **Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:	
<b>a</b>	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	<b>1a</b> 118,157.
<b>b</b>	Program-related investments - total from Part IX-B	<b>1b</b> 0.
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the:	
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b> 118,157.
<b>5</b>	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	<b>5</b> 0.
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b> 118,157.

**Note:** The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

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**Part XIII Undistributed Income** (see instructions)

	(a) Corpus	(b) Years prior to 2015	(c) 2015	(d) 2016
<b>1</b> Distributable amount for 2016 from Part XI, line 7				88,788.
<b>2</b> Undistributed income, if any, as of the end of 2016				
<b>a</b> Enter amount for 2015 only			0.	
<b>b</b> Total for prior years:		0.		
<b>3</b> Excess distributions carryover, if any, to 2016:				
<b>a</b> From 2011				
<b>b</b> From 2012				
<b>c</b> From 2013				
<b>d</b> From 2014				
<b>e</b> From 2015	32.			
<b>f</b> Total of lines 3a through e	32.			
<b>4</b> Qualifying distributions for 2016 from Part XII, line 4: ► \$ 118,157.			0.	
<b>a</b> Applied to 2015, but not more than line 2a			0.	
<b>b</b> Applied to undistributed income of prior years (Election required - see instructions)		0.		
<b>c</b> Treated as distributions out of corpus (Election required - see instructions)	0.			
<b>d</b> Applied to 2016 distributable amount				88,788.
<b>e</b> Remaining amount distributed out of corpus	29,369.			
<b>5</b> Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
<b>6</b> Enter the net total of each column as indicated below:	29,401.			
<b>a</b> Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
<b>b</b> Prior years' undistributed income. Subtract line 4b from line 2b		0.		
<b>c</b> 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.		
<b>d</b> Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
<b>e</b> Undistributed income for 2015. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
<b>f</b> Undistributed income for 2016. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2017				0.
<b>7</b> 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.			
<b>8</b> Excess distributions carryover from 2011 not applied on line 5 or line 7	0.			
<b>9</b> Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	29,401.			
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2012				
<b>b</b> Excess from 2013				
<b>c</b> Excess from 2014				
<b>d</b> Excess from 2015	32.			
<b>e</b> Excess from 2016	29,369.			



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**Part XV** **Supplementary Information** (continued)

<b>3 Grants and Contributions Paid During the Year or Approved for Future Payment</b>				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a Paid during the year</b>				
20/20/20 P.O. BOX 96669 WASHINGTON, DC 20090	N/A	PC	UNRESTRICTED	100.
ALZHEIMER'S DISEASE RESEARCH 225 N. MICHIGAN AVE, 17TH FLOOR CHICAGO, IL 60601	N/A	PC	UNRESTRICTED	500.
AMERICAN CANCER SOCIETY 250 WILLIAMS STREET NW ATLANTA, GA 30303	N/A	PC	UNRESTRICTED	100.
AMERICAN CIVIL LIBERTIES UNION 125 BROAD STREET, 18TH FL NEW YORK, NY 10033	N/A	PC	UNRESTRICTED	1,000.
AMERICAN COMMITTEE FOR SHAARE ZEDEK 55 WEST 39TH STREET, 4TH FL NEW YORK, NY 10018	N/A	PC	UNRESTRICTED	100.
<b>Total</b>	<b>SEE CONTINUATION SHEET(S)</b>			<b>112,532.</b>
<b>b Approved for future payment</b>				
NONE				
<b>Total</b>				<b>0.</b>

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## Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
	(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount		
1 Program service revenue:						
a _____						
b _____						
c _____						
d _____						
e _____						
f _____						
g Fees and contracts from government agencies						
2 Membership dues and assessments						
3 Interest on savings and temporary cash investments			14	29.		
4 Dividends and interest from securities						
5 Net rental income or (loss) from real estate:						
a Debt-financed property						
b Not debt-financed property						
6 Net rental income or (loss) from personal property						
7 Other investment income						
8 Gain or (loss) from sales of assets other than inventory						
9 Net income or (loss) from special events						
10 Gross profit or (loss) from sales of inventory						
11 Other revenue:						
a _____						
b _____						
c _____						
d _____						
e _____						
12 Subtotal. Add columns (b), (d), and (e)		0.		29.		0.
13 Total. Add line 12, columns (b), (d), and (e)						29.

(See worksheet in line 13 instructions to verify calculations.)

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

[illegible]

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

- |  |                     |                  |
|--|---------------------|------------------|
| <p><b>1</b> Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?</p> <p><b>a</b> Transfers from the reporting foundation to a noncharitable exempt organization of:</p> <p>(1) Cash</p> <p>(2) Other assets</p> <p><b>b</b> Other transactions:</p> <p>(1) Sales of assets to a noncharitable exempt organization</p> <p>(2) Purchases of assets from a noncharitable exempt organization</p> <p>(3) Rental of facilities, equipment, or other assets</p> <p>(4) Reimbursement arrangements</p> <p>(5) Loans or loan guarantees</p> <p>(6) Performance of services or membership or fundraising solicitations</p> <p><b>c</b> Sharing of facilities, equipment, mailing lists, other assets, or paid employees</p> <p><b>d</b> If the answer to any of the above is "Yes," complete the following schedule. Column <b>(b)</b> should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column <b>(d)</b> the value of the goods, other assets, or services received.</p> | <p><b>Yes</b></p>   | <p><b>No</b></p> |
|  | <p><b>1a(1)</b></p> |                  |
|  | <p><b>1a(2)</b></p> |                  |
|  | <p><b>1b(1)</b></p> |                  |
|  | <p><b>1b(2)</b></p> |                  |
|  | <p><b>1b(3)</b></p> |                  |
|  | <p><b>1b(4)</b></p> |                  |
|  | <p><b>1b(5)</b></p> |                  |
|  | <p><b>1b(6)</b></p> |                  |
|  | <p><b>1c</b></p>    |                  |

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

[illegible]

- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? Yes ☒ No ☐


- b** If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

**Sign  
Here**

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief this is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

and believe this true, correct, and complete. Declaration of preparator (or preparator and trustee) to be signed by preparator and trustee.

 Judith Stern

Signature of officer or trustee

13/11/12  
Date

**PRESIDENT**  
Title

May the IRS discuss this return with the preparer shown below (see instr )?

☒ Yes ☐ No

☒ Yes ☐ No

**Paid  
Preparer  
Use Only**

Print/Type preparer's name

MICHELLE MCCORKLE

Preparer's signature

численные точки

Date \_\_\_\_\_

05/10/17

Check ☐ self-employed

PTIN

P00841591

Firm's name ► **DELOITTE TAX LLP**

Firm's address ► 111 S. WACKER DR  
CHICAGO, IL 60606

Firm's EIN ▶ 86-1065772

Phone no. (312) 486-1000

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RICHARD AND JUDITH STERN FAMILY  
FOUNDATION

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**Part XV** Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)				
Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
AMERICAN COMMITTEE FOR THE WEIZMANN INSTITUTE 180 N LASALLE ST #3110 CHICAGO, IL 60601	N/A	PC	UNRESTRICTED	1,000.
AMERICAN FOUNDATION FOR THE BLIND 2 PENN PLAZA, SUITE 1102 NEW YORK, NY 10121	N/A	PC	UNRESTRICTED	200.
AMERICAN INSTITUTE FOR CANCER RESEARCH 1759 R STREET, NW WASHINGTON, DC 20009	N/A	PC	UNRESTRICTED	100.
AMERICAN RED CROSS OF GREATER CHICAGO 2200 W. HARRISON ST. CHICAGO, IL 60612	N/A	PC	UNRESTRICTED	100.
ANTI-CRUELTY SOCIETY 157 WEST GRAND AVENUE CHICAGO, IL 60654	N/A	PC	UNRESTRICTED	100.
ANTI-DEFAMATION LEAGUE, THE 605 THIRD AVENUE NEW YORK, NY 10158	N/A	PC	UNRESTRICTED	2,500.
ARK, THE 6450 N. CALIFORNIA AVE CHICAGO, IL 60645	N/A	PC	UNRESTRICTED	250.
ART INSTITUTE OF CHICAGO 111 SOUTH MICHIGAN AVENUE CHICAGO, IL 60603	N/A	PC	UNRESTRICTED	2,500.
BREAST CANCER CHARITIES OF AMERICA 8505 TECHNOLOGY FOREST PL #604 THE WOODLANDS, TX 77381	N/A	PC	UNRESTRICTED	30.
BROWN UNIVERSITY ADVANCEMENT DIVISION BOX 1893 PROVIDENCE, RI 02912	N/A	PC	UNRESTRICTED	2,500.
Total from continuation sheets				110,732.

RICHARD AND JUDITH STERN FAMILY  
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**Part XV** Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)				
Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
CENTER FOR AMERICAN PROGRESS, THE 1333 H STREET, NW 10TH FLOOR WASHINGTON, DC 20005	N/A	PC	UNRESTRICTED	1,000.
CHICAGO PUBLIC LIBRARY FOUNDATION 20 N MICHIGAN AVE CHICAGO, IL 60602	N/A	PC	UNRESTRICTED	150.
CHICAGO SYMPHONY ORCHESTRA 220 SOUTH MICHIGAN AVENUE CHICAGO, IL 60604	N/A	PC	UNRESTRICTED	500.
CJE SENIOR LIFE (COUNCIL FOR JEWISH ELDERLY) 3003 W. TOUHY AVE CHICAGO, IL 60645	N/A	PC	UNRESTRICTED	200.
COMPASSION & CHOICES 4155 E. JEWELL AVENUE SUITE 200 DENVER, CO 80222	N/A	PC	UNRESTRICTED	50.
DOCTORS WITHOUT BORDERS 333 SEVENTH AVENUE, 2ND FLOOR NEW YORK, NY 10001	N/A	PC	UNRESTRICTED	100.
ENVIRONMENTAL DEFENSE FUND 257 PARK AVENUE SOUTH NEW YORK, NY 10010	N/A	PC	UNRESTRICTED	200.
FEED THE CHILDREN 333 NORTH MERIDIAN AVENUE, P.O. BOX 36 OKLAHOMA CITY, OK 73101	N/A	PC	UNRESTRICTED	100.
FEEDING AMERICA 35 EAST WACKER DRIVE SUITE 2000 CHICAGO, IL 60601	N/A	PC	UNRESTRICTED	100.
FIREFIIGHTERS SUPPORT FOUNDATION 40 SCHOOL ST., STE. 10 GREENFIELD, MA 01301	N/A	PC	UNRESTRICTED	25.
Total from continuation sheets				

**RICHARD AND JUDITH STERN FAMILY  
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**Part XV Supplementary Information**

**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
FOUNDATION FOR AMERICAN VETERANS 7473 WILSHIRE W BLOOMFIELD, MI 48322	N/A	PC	UNRESTRICTED	40.
FRIENDS OF THE IDF (ISRAELI DEFENSE FORCES) 60 EAST 42ND STREET NEW YORK, NY 10165	N/A	PC	UNRESTRICTED	448.
FRIENDS OF THE PARKS P.O. BOX 162 RUSSELLVILLE, IN 46175	N/A	PC	UNRESTRICTED	100.
FRIENDS OF YAD SARAH 450 PARK AVENUE, 7TH FL NEW YORK, NY 10022	N/A	PC	UNRESTRICTED	100.
GEORGE WASHINGTON'S MOUNT VERNON P.O. BOX 110 MOUNT VERNON, VA 22121	N/A	PC	UNRESTRICTED	29.
GREATER CHICAGO FOOD DEPOSITORY 4100 W ANN LURIE PL CHICAGO, IL 60632	N/A	PC	UNRESTRICTED	100.
GUIDE DOGS FOR THE BLIND P.O. BOX 151200 SAN RAFAEL, CA 94915	N/A	PC	UNRESTRICTED	100.
HOPE FOR HENRY FOUNDATION 2300 WISCONSIN AVE, NW SUITE 100A WASHINGTON, DC 20007	N/A	PC	UNRESTRICTED	1,000.
HUMAN RIGHTS WATCH 350 FIFTH AVENUE, 34TH FLOOR NEW YORK, NY 10118	N/A	PC	UNRESTRICTED	200.
IN MEMORY OF 1995 CANDLEWYCK DRIVE CHARLOTTESVILLE, VA 22901	N/A	PC	UNRESTRICTED	10,000.
<b>Total from continuation sheets</b>				

RICHARD AND JUDITH STERN FAMILY  
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**Part XV** Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
INTERNATIONAL CENTER FOR RESEARCH ON WOMEN 1120 20TH STREET NW 500 N WASHINGTON, DC 20036	N/A	PC	UNRESTRICTED	1,000.
ISRAEL CHILDREN'S CANCER FOUNDATION 141 WASHINGTON AVE # 205 LAWRENCE, NY 11559	N/A	PC	UNRESTRICTED	100.
JEWISH CHILD & FAMILY SERVICES 216 W. JACKSON BLVD., SUITE 700 CHICAGO, IL 60606	N/A	PC	UNRESTRICTED	350.
JEWISH UNITED FUND OF METROPOLITAN CHICAGO 30 SOUTH WELLS STREET, ROOM 3134 CHICAGO, IL 60606	N/A	PC	UNRESTRICTED	25,000.
LAKEVIEW PANTRY 3945 NORTH SHERIDAN ROAD CHICAGO, IL 60613	N/A	PC	UNRESTRICTED	50.
LEAGUE OF WOMEN VOTERS EDUCATION FUND 1730 M STREET, NW SUITE 1000 WASHINGTON, DC 20036	N/A	PC	UNRESTRICTED	50.
MAKE-A-WISH ILLINOIS 640 N LASALLE DRIVE, STE 280 CHICAGO, IL 60654	N/A	PC	UNRESTRICTED	35.
MEALS ON WHEELS FOUNDATION OF NORTHERN ILLINOIS 3239 SOUTH GROVE AVE., SUITE 202 BERWYN, IL 60402	N/A	PC	UNRESTRICTED	100.
MERCY SHIPS P.O. BOX 1930 GARDEN VALLEY, TX 75771	N/A	PC	UNRESTRICTED	100.
MICHAEL J. FOX FOUNDATION FOR PARKINSON'S RESEARCH P.O. BOX 4777 NEW YORK, NY 10163	N/A	PC	UNRESTRICTED	1,000.
Total from continuation sheets				

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**Part XV** Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)				
Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
NATIONAL FOUNDATION FOR CANCER RESEARCH 4600 EAST WEST HIGHWAY SUITE 525 BETHESDA, MD 20814	N/A	PC	UNRESTRICTED	250.
NATIONAL LAW ENFORCEMENT OFFICERS MEMORIAL FUND 901 E STREET NW SUITE 100 WASHINGTON, DC 20004	N/A	PC	UNRESTRICTED	40.
NATIONAL PARK FOUNDATION 1110 VERMONT AVENUE, NW, SUITE 200 WASHINGTON, DC 20005	N/A	PC	UNRESTRICTED	100.
NATIONAL PARTNERSHIP FOR WOMEN & FAMILIES 1875 CONNECTICUT AVE. NW STE. 650 WASHINGTON, DC 20009	N/A	PC	UNRESTRICTED	1,000.
NATIONAL PUBLIC RADIO 1111 NORTH CAPITOL ST, NE WASHINGTON, DC 20002	N/A	PC	UNRESTRICTED	1,000.
NATIONAL WOMEN'S LAW CENTER 11 DUPONT CIRCLE NW STE. 800 WASHINGTON, DC 20036	N/A	PC	UNRESTRICTED	1,000.
NATURE CONSERVANCY (THE) 4245 NORTH FAIRFAX DRIVE, SUITE 100 ARLINGTON, VA 22203	N/A	PC	UNRESTRICTED	25.
NORTHWESTERN UNIVERSITY 633 CLARK ST. EVANSTON, IL 60208	N/A	PC	UNRESTRICTED	1,000.
OPERATION FINALLY HOME 1659 STATE HIGHWAY 46 WEST SUITE 11 NEW BRAUNFELS, TX 78132	N/A	PC	UNRESTRICTED	50.
ORBIS 520 EIGHTH AVENUE, 11TH FLOOR NEW YORK, NY 10018	N/A	PC	UNRESTRICTED	100.
Total from continuation sheets				

RICHARD AND JUDITH STERN FAMILY  
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**Part XV Supplementary Information**

3 Grants and Contributions Paid During the Year (Continuation)				
Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
PAWS FOR PURPLE HEARTS 5860 LABATH AVE ROHNERT PARK, CA 94928	N/A	PC	UNRESTRICTED	50.
ROCKY MOUNTAIN INSTITUTE, THE 1820 FOLSON STREET BOULDER, CO 80302	N/A	PC	UNRESTRICTED	1,000.
SALVATION ARMY 5040 NORTH PULASKI ROAD CHICAGO, IL 60630	N/A	PC	UNRESTRICTED	100.
SMILE TRAIN 41 MADISON AVE, 28TH FL NEW YORK, NY 10010	N/A	PC	UNRESTRICTED	100.
SMITHSONIAN NMAAHC (NATLMUSEUM-APRAMHIST) 1000 JEFFERSON DRIVE, S.W. WASHINGTON, DC 20560	N/A	PC	UNRESTRICTED	50.
SOAR 244 E PEARSON ST CHICAGO, IL 60611	N/A	PC	UNRESTRICTED	100.
SPECIAL OLYMPICS 541 N FAIRBANKS CT CHICAGO, IL 60611	N/A	PC	UNRESTRICTED	100.
ST. JUDE CHILDREN'S RESEARCH HOSPITAL 501 ST. JUDE PLACE MEMPHIS, TN 38105	N/A	PC	UNRESTRICTED	35.
SUN VALLEY SUMMER SYMPHONY P.O. BOX 1914 SUN VALLEY, ID 83353	N/A	PC	UNRESTRICTED	2,180.
UNICEF, U.S. FUND 125 MAIDEN LANE NEW YORK, NY 10038	N/A	PC	UNRESTRICTED	100.
Total from continuation sheets				

RICHARD AND JUDITH STERN FAMILY  
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**Part XV. Supplementary Information**

**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
UNITED CANCER SUPPORT FOUNDATION 6700 BAUM DRIVE, SUITE 8 KNOXVILLE, TN 37919	N/A	PC	UNRESTRICTED	50.
UNITED STATES OLYMPIC COMMITTEE 1 OLYMPIC PLAZA COLORADO SPRINGS, CO 80909	N/A	PC	UNRESTRICTED	100.
USO (UNITED SERVICE ORGANIZATIONS) 2111 WILSON BLVD, SUITE 1200 ARLINGTON, VA 22201	N/A	PC	UNRESTRICTED	75.
VETERANS OF THE MIDLANDS 6789 COUNTY ROAD 32 FORT CALHOUN, NE 68023	N/A	PC	UNRESTRICTED	20.
WESTMARK SCHOOL 5461 LOUISE AVENUE ENCINO, CA 91316	N/A	PC	UNRESTRICTED	20,000.
WJC, AMERICAN SECTION (WORLD JEWISH CONGRESS) 501 MADISON AVENUE NEW YORK, NY 10022	N/A	PC	UNRESTRICTED	28,500.
WTTW11 (CHANNEL 11) 5400 N ST LOUIS AVE CHICAGO, IL 60625	N/A	PC	UNRESTRICTED	1,000.
YALE UNIVERSITY 157 CHURCH STREET NEW HAVEN, CT 06510	N/A	PC	UNRESTRICTED	1,000.
Total from continuation sheets				

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

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
INTEREST INCOME	29.	29.	
TOTAL TO PART I, LINE 3	29.	29.	

## FORM 990-PF ACCOUNTING FEES STATEMENT 2

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
TAX PREPARATION FEES	5,600.	0.		5,600.
TO FORM 990-PF, PG 1, LN 16B	5,600.	0.		5,600.

## FORM 990-PF OTHER EXPENSES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FILING FEES	25.	0.		25.
TO FORM 990-PF, PG 1, LN 23	25.	0.		25.

## FORM 990-PF OTHER INVESTMENTS STATEMENT 4

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
EMINENCE FUND LTD	COST	490,468.	1,521,325.
TOTAL TO FORM 990-PF, PART II, LINE 13		490,468.	1,521,325.