



See a Social Security Number? Say Something!  
Report Privacy Problems to <https://public.resource.org/privacy>  
Or call the IRS Identity Theft Hotline at 1-800-908-4490



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

Name of foundation WR Berkley Corporation Charitable Foundation % Foundation Source		A Employer identification number 36-4516560	
Number and street (or P O box number if mail is not delivered to street address) Foundation Source 501 Silverside Rd		Room/suite	
B Telephone number (see instructions) (800) 839-1754			
City or town, state or province, country, and ZIP or foreign postal code Wilmington, DE 198091377		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <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) \$ 196,872	J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis )	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) (see instructions) )		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	259,592			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B . . . . .				
	3 Interest on savings and temporary cash investments	37	37		
	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 _____				
Operating and Administrative Expenses	b Less Cost of goods sold . . . . .				
	c Gross profit or (loss) (attach schedule) . . . . .				
	11 Other income (attach schedule) . . . . .				
	12 Total. Add lines 1 through 11 . . . . .	259,629	37		
	13 Compensation of officers, directors, trustees, etc	0			
	14 Other employee salaries and wages . . . . .				
	15 Pension plans, employee benefits . . . . .				
	16a Legal fees (attach schedule) . . . . .				
	b Accounting fees (attach schedule) . . . . .				
	c Other professional fees (attach schedule) . . . . .				
	17 Interest . . . . .				
	18 Taxes (attach schedule) (see instructions) . . .				
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy . . . . .				
	21 Travel, conferences, and meetings . . . . .				
	22 Printing and publications . . . . .				
	23 Other expenses (attach schedule) . . . . .	3,977			3,977
	24 Total operating and administrative expenses. Add lines 13 through 23 . . . . .	3,977	0		3,977
	25 Contributions, gifts, grants paid . . . . .	459,440			459,440
	26 Total expenses and disbursements. Add lines 24 and 25	463,417	0		463,417
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-203,788			
	b Net investment income (if negative, enter -0-)		37		
	c Adjusted net income (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)			
		Beginning of year (a) Book Value	End of year (b) Book Value (c) Fair Market Value		
Assets	1	Cash—non-interest-bearing . . . . .			
	2	Savings and temporary cash investments . . . . .	400,660	196,872	196,872
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable . . . . .			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use . . . . .			
	9	Prepaid expenses and deferred charges . . . . .			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule) . . . . .			
	c	Investments—corporate bonds (attach schedule) . . . . .			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans . . . . .			
	13	Investments—other (attach schedule) . . . . .			
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)				
16	<b>Total assets</b> (to be completed by all filers—see the instructions Also, see page 1, item I)	400,660	196,872	196,872	
Liabilities	17	Accounts payable and accrued expenses . . . . .			
	18	Grants payable . . . . .			
	19	Deferred revenue . . . . .			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule) . . . . .			
	22	Other liabilities (describe ▶ _____)			
	23	<b>Total liabilities</b> (add lines 17 through 22) . . . . .	0	0	
Net Assets or Fund Balances	<b>Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/></b> <b>and complete lines 24 through 26 and lines 30 and 31.</b>				
	24	Unrestricted . . . . .			
	25	Temporarily restricted . . . . .			
	26	Permanently restricted . . . . .			
	<b>Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/></b> <b>and complete lines 27 through 31.</b>				
	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	400,660	196,872	
30	<b>Total net assets or fund balances</b> (see instructions) . . . . .	400,660	196,872		
31	<b>Total liabilities and net assets/fund balances</b> (see instructions) .	400,660	196,872		

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	400,660
2	Enter amount from Part I, line 27a . . . . .	2	-203,788
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3 . . . . .	4	196,872
5	Decreases not included in line 2 (itemize) ▶ _____	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	196,872

**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>			

  

(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			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
<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)	2	
<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) (see instructions) If (loss), enter -0- in Part I, line 8	3	

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

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

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2015	627,417	386,405	1 623729
2014	523,751	341,065	1 535634
2013	463,930	259,178	1 790005
2012	382,508	265,030	1 443263
2011	368,618	235,355	1 566221
<b>2 Total</b> of line 1, column (d)			<b>2</b> 7 958852
<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> 1 59177
<b>4</b> Enter the net value of noncharitable-use assets for 2016 from Part X, line 5			<b>4</b> 329,503
<b>5</b> Multiply line 4 by line 3			<b>5</b> 524,493
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)			<b>6</b>
<b>7</b> Add lines 5 and 6			<b>7</b> 524,493
<b>8</b> Enter qualifying distributions from Part XII, line 4			<b>8</b> 463,417

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions

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

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

**Part VII-A Statements Regarding Activities**

	Yes	No
<b>1a</b> 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? . . . . .	<b>1a</b>	<b>No</b>
<b>b</b> Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? . . . . . <i>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</i>	<b>1b</b>	<b>No</b>
<b>c</b> Did the foundation file <b>Form 1120-POL</b> for this year? . . . . .	<b>1c</b>	<b>No</b>
<b>d</b> Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ▶ \$ _____ (2) On foundation managers ▶ \$ _____		
<b>e</b> Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ _____		
<b>2</b> Has the foundation engaged in any activities that have not previously been reported to the IRS? . . . . . <i>If "Yes," attach a detailed description of the activities</i>	<b>2</b>	<b>No</b>
<b>3</b> 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? <i>If "Yes," attach a conformed copy of the changes</i> . . . . .	<b>3</b>	<b>No</b>
<b>4a</b> Did the foundation have unrelated business gross income of \$1,000 or more during the year? . . . . .	<b>4a</b>	<b>No</b>
<b>b</b> If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year? . . . . .	<b>4b</b>	
<b>5</b> Was there a liquidation, termination, dissolution, or substantial contraction during the year? . . . . . <i>If "Yes," attach the statement required by General Instruction T</i>	<b>5</b>	<b>Yes</b>
<b>6</b> 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? . . . . .	<b>6</b>	<b>Yes</b>
<b>7</b> Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i> . . . . .	<b>7</b>	<b>Yes</b>
<b>8a</b> Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ DE _____		
<b>b</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? <i>If "No," attach explanation</i> .	<b>8b</b>	<b>Yes</b>
<b>9</b> 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)? <i>If "Yes," complete Part XIV</i> . . . . .	<b>9</b>	<b>No</b>
<b>10</b> Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i> . . . . .	<b>10</b>	<b>No</b>

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

<b>11</b>	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).	<b>11</b>		<b>No</b>
<b>12</b>	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)	<b>12</b>		<b>No</b>
<b>13</b>	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ►	<b>13</b>	<b>Yes</b>	
<b>14</b>	The books are in care of ► Foundation Source Telephone no ► (800) 839-1754			

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

<b>15</b>	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> —Check here . . . . .	<input type="checkbox"/>		
	and enter the amount of tax-exempt interest received or accrued during the year . . . . .	<b>15</b>		
<b>16</b>	At any time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes," enter the name of the foreign country ►	<b>16</b>	<b>Yes</b>	<b>No</b>

**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.**

<b>1a</b>	During the year did the foundation (either directly or indirectly)		<b>Yes</b>	<b>No</b>
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(6) Agree to pay money or property to a government official? ( <b>Exception.</b> 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 ). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
<b>b</b>	If any answer is "Yes" to 1a(1)–(6), did <b>any</b> 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)? <input type="checkbox"/>	<b>1b</b>		
<b>c</b>	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? <input type="checkbox"/>	<b>1c</b>		<b>No</b>
<b>2</b>	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))			
<b>a</b>	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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ► 20____, 20____, 20____, 20____			
<b>b</b>	Are there any years listed in 2a for which the foundation is <b>not</b> 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 <b>all</b> years listed, answer "No" and attach statement—see instructions ). <input type="checkbox"/>	<b>2b</b>		
<b>c</b>	If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here ► 20____, 20____, 20____, 20____			
<b>3a</b>	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
<b>b</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 ). <input type="checkbox"/>	<b>3b</b>		
<b>4a</b>	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	<b>4a</b>		<b>No</b>
<b>b</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?	<b>4b</b>		<b>No</b>

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

<b>5a</b> During the year did the foundation pay or incur any amount to <b>(1)</b> Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? <span style="float:right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span> <b>(2)</b> Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? <span style="float:right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span> <b>(3)</b> Provide a grant to an individual for travel, study, or other similar purposes? <span style="float:right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span> <b>(4)</b> Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions). <span style="float:right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span> <b>(5)</b> Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? <span style="float:right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span> <b>b</b> If any answer is "Yes" to 5a(1)–(5), did <b>any</b> 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)? <span style="float:right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span> Organizations relying on a current notice regarding disaster assistance check here. <span style="float:right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span> <b>c</b> 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? <span style="float:right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span> If "Yes," attach the statement required by Regulations section 53.4945–5(d)	<b>5b</b>		
<b>6a</b> Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? <span style="float:right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span> <b>b</b> Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? <span style="float:right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span> If "Yes" to 6b, file Form 8870	<b>6b</b>		<b>No</b>
<b>7a</b> At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? <span style="float:right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span> <b>b</b> If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? <span style="float:right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</span>	<b>7b</b>		

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

<b>1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).</b>				
(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
William R Berkley Foundation Source 501 Silverside Rd Wilmington, DE 198091377	Pres / Dir 1 0	0	0	0
William R Berkley Jr Foundation Source 501 Silverside Rd Wilmington, DE 198091377	VP / Dir / Treas 1 0	0	0	0
Josephine A Raimondi Foundation Source 501 Silverside Rd Wilmington, DE 198091377	VP / Dir / Sec 1 0	0	0	0
<b>2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."</b>				
(a) Name and address of each employee paid more than \$50,000	Title, and average hours per week (b) devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
<b>Total number of other employees paid over \$50,000.</b>				▶

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

[illegible]

<b>Total</b> number of others receiving over \$50,000 for professional services. . . . .	▶	
--	---	--

<b>Part IX-A</b>	<b>Summary of Direct Charitable Activities</b>
------------------	--

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
--	----------

Organizations and other beneficiaries of VC, conferences, seminars, research papers produced, etc.	
1	
2	
3	
4	

**Part IX-B Summary of Program-Related Investments** (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
<b>1</b>	
<b>2</b>	
All other program-related investments See instructions	
<b>3</b>	

<b>Total.</b> Add lines 1 through 3										▶
-------------------------------------	--	--	--	--	--	--	--	--	--	---

**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>	334,521
<b>c</b>	Fair market value of all other assets (see instructions).	<b>1c</b>	0
<b>d</b>	<b>Total</b> (add lines 1a, b, and c).	<b>1d</b>	334,521
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	<b>1e</b>	
<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>	334,521
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	<b>4</b>	5,018
<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>	329,503
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5.	<b>6</b>	16,475

**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>	16,475
<b>2a</b>	Tax on investment income for 2016 from Part VI, line 5.	<b>2a</b>	1
<b>b</b>	Income tax for 2016 (This does not include the tax from Part VI).	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b.	<b>2c</b>	1
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1.	<b>3</b>	16,474
<b>4</b>	Recoveries of amounts treated as qualifying distributions.	<b>4</b>	
<b>5</b>	Add lines 3 and 4.	<b>5</b>	16,474
<b>6</b>	Deduction from distributable amount (see instructions).	<b>6</b>	
<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>	16,474

**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>	463,417
<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>	0
<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>	0
<b>b</b>	Cash distribution test (attach the required schedule).	<b>3b</b>	0
<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>	463,417
<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 (see instructions).	<b>5</b>	
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4.	<b>6</b>	463,417

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

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

	(a) Corpus	(b) Years prior to 2015	(c) 2015	(d) 2016
<b>1</b> Distributable amount for 2016 from Part XI, line 7				16,474
<b>2</b> Undistributed income, if any, as of the end of 2016				
<b>a</b> Enter amount for 2015 only. . . . .				
<b>b</b> Total for prior years 2014, 2013, 2012				
<b>3</b> Excess distributions carryover, if any, to 2016				
<b>a</b> From 2011. . . . .	356,851			
<b>b</b> From 2012. . . . .	369,257			
<b>c</b> From 2013. . . . .	439,471			
<b>d</b> From 2014. . . . .	506,198			
<b>e</b> From 2015. . . . .	608,097			
<b>f</b> <b>Total</b> of lines 3a through e. . . . .	2,279,874			
<b>4</b> Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ 463,417				
<b>a</b> Applied to 2015, but not more than line 2a				
<b>b</b> Applied to undistributed income of prior years (Election required—see instructions). . . . .				
<b>c</b> Treated as distributions out of corpus (Election required—see instructions). . . . .				
<b>d</b> Applied to 2016 distributable amount. . . . .				16,474
<b>e</b> Remaining amount distributed out of corpus	446,943			
<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) )				
<b>6</b> <b>Enter the net total of each column as indicated below:</b>				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5	2,726,817			
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b . . . . .				
<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. . . . .				
<b>d</b> Subtract line 6c from line 6b Taxable amount—see instructions . . . . .				
<b>e</b> Undistributed income for 2015 Subtract line 4a from line 2a Taxable amount—see instructions . . . . .				
<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) . . . . .				
<b>8</b> Excess distributions carryover from 2011 not applied on line 5 or line 7 (see instructions) . . .	356,851			
<b>9</b> <b>Excess distributions carryover to 2017.</b> Subtract lines 7 and 8 from line 6a . . . . .	2,369,966			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2012. . . . .	369,257			
<b>b</b> Excess from 2013. . . . .	439,471			
<b>c</b> Excess from 2014. . . . .	506,198			
<b>d</b> Excess from 2015. . . . .	608,097			
<b>e</b> Excess from 2016. . . . .	446,943			

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

**1a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2016, enter the date of the ruling. . . . . ▶

**b** Check box to indicate whether the organization is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

**2a** Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed . . . . .

	Tax year	Prior 3 years			(e) Total
	(a) 2016	(b) 2015	(c) 2014	(d) 2013	
<b>b</b> 85% of line 2a . . . . .					
<b>c</b> Qualifying distributions from Part XII, line 4 for each year listed . . . . .					
<b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities . . . . .					
<b>e</b> Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c . . . . .					

**3** Complete 3a, b, or c for the alternative test relied upon

**a** "Assets" alternative test—enter

(1) Value of all assets . . . . .

(2) Value of assets qualifying under section 4942(j)(3)(B)(i) . . . . .

**b** "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . . . .

**c** "Support" alternative test—enter

(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) . . . . .

(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . . .

(3) Largest amount of support from an exempt organization . . . . .

(4) Gross investment income . . . . .

**Part XV Supplementary Information** (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see instructions.)

**1 Information Regarding Foundation Managers:**

**a** List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2) )

NONE

**b** List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

**2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**

Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

**a** The name, address, and telephone number or email address of the person to whom applications should be addressed

**b** The form in which applications should be submitted and information and materials they should include

**c** Any submission deadlines

**d** Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors

**Part XV** **Supplementary Information** (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	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</b> <i>Paid during the year</i> See Additional Data Table				
<b>Total</b> . . . . .			<b>3a</b>	459,440
<b>b</b> <i>Approved for future payment</i>				
<b>Total</b> . . . . .			<b>3b</b>	

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

Enter gross amounts unless otherwise indicated

**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 . . . . .**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). . . . .**13 Total.** Add line 12, columns (b), (d), and (e). . . . . **13** **37**  
(See worksheet in line 13 instructions to verify calculations )**Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes****Line No.**

Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions )

## Part XVII

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

[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

May the IRS discuss this return with the preparer shown below (see instr )? ☒ Yes ☐ No

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

Form 990FP Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

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)				
a Paid during the year				
ACROSS THE RIVER COLLABORATIVE PO BOX 318 CORNISH, ME 04020	N/A	PC	After School Adventures Program	2,500
ALS KNIGHTS 8 INDUSTRIAL WAY WHITMAN, MA 02382	N/A	PC	ALS One Patient and Family Support Program	1,700
AMERICAN CANCER SOCIETY 1851 OLD CUTHBERT RD CHERRY HILL, NJ 08034	N/A	PC	General & Unrestricted	1,000
AMERICAN ENTERPRISE INSTITUTE FOR PUBLIC POLICY RE 1150 17TH ST NW WASHINGTON, DC 20036	N/A	PC	General & Unrestricted	5,000
AMERICAN FOUNDATION FOR SUICIDE PREVENTION - CAPIT PO BOX 486 EAST GREENBUSH, NY 12061	N/A	PC	Neighborhood and Community Services Program	2,450
AMERICAN HEART ASSOCIATION 210 MALABU DR STE 125 LEXINGTON, KY 40503	N/A	PC	General & Unrestricted	1,500
AMERICAN HEART ASSOCIATION INC 1449 MEDICAL PARK DR BIRMINGHAM, AL 35213	N/A	PC	General & Unrestricted	5,500
AMERICARES FOUNDATION INC 88 HAMILTON AVE STAMFORD, CT 06902	N/A	PC	Ecuador Earthquake Relief Fund	470
ARIZONA STATE UNIVERSITY FOUNDATION FOR A NEW AMER PO BOX 2260 TEMPE, AZ 85280	N/A	PC	Math and Statistical Sciences Scholarship Fund	5,000
ASSISTANCE LEAGUE OF BOISE IDAHO INC PO BOX 140104 GARDEN CITY, ID 83714	N/A	PC	Operation School Bell	2,500
ATLANTA CHILDRENS SHELTER INC PO BOX 54322 ATLANTA, GA 30308	N/A	PC	General & Unrestricted	2,500
AUTISM SPEAKS INC 1060 STATE RD 2ND FL PRINCETON, NJ 08540	N/A	PC	Family Services program run by Autism Speaks of Avon, CT	1,100
BILLINGS FORGE COMMUNITY WORKS INC 140 RUSS ST HARTFORD, CT 06106	N/A	PC	Work Force Development Program	1,000
BLUE RIDGE AREA FOOD BANK INC PO BOX 937 VERONA, VA 24482	N/A	PC	General & Unrestricted	500
BOYS & GIRLS CLUB OF GREENWICH INC 4 HORSENECK LN GREENWICH, CT 06830	N/A	PC	General & Unrestricted	10,000
Total . . . . . ►				459,440
3a				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

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</b> Paid during the year				
BOYS AND GIRLS CLUBS OF METROWEST INC 169 PLEASANT ST MARLBORO, MA 01752	N/A	PC	After School Program	1,700
BOYS CLUB OF MT VERNON N Y INC 350 S 6TH AVE MOUNT VERNON, NY 10550	N/A	PC	General & Unrestricted	10,400
CAMP ANGELS INC PO BOX 89 WATERFORD, ME 04088	N/A	PC	General & Unrestricted	3,600
CAMP RAINBOW FOUNDATION 13990 OLIVE BLVD STE 203 3 CHESTERFIELD, MO 63017	N/A	PC	General & Unrestricted	500
CASCO LIBRARY ASSOCIATION PO BOX 420 CASCO, ME 04015	N/A	PC	Children's Storytime/Early Literacy Program	3,250
CHARITABLE ASSISTANCE TO COMMUNITY'S HOMELESS 503 S AMERICANA BLVD BOISE, ID 83702	N/A	PC	General & Unrestricted	3,000
CHILD CRISIS ARIZONA 817 N COUNTRY CLUB DR MESA, AZ 85201	N/A	PC	General & Unrestricted	7,500
CHILDRENS INN AT NIH INC 7 W DR BETHESDA, MD 20814	N/A	PC	General & Unrestricted	500
COMMUNITIES IN SCHOOLS OF CARROLLTON CITY AND CARR 401 ADAMSON SQ RM 320 CARROLLTON, GA 30117	N/A	PC	General & Unrestricted	1,000
COMMUNITY CHEST OF ENGLEWOOD 310 ENGLE ST ENGLEWOOD, NJ 07631	N/A	PC	General & Unrestricted	1,000
CONTACT COMMUNITY SERVICES INC 6311 COURT ST RD EAST SYRACUSE, NY 13057	N/A	PC	Crisis and Suicide Prevention, Student Programming, Teacher Training, Mental Health Training and Community Resources	2,450
COUNCIL OF DES MOINES 1426 6TH AVE DES MOINES, IA 50314	N/A	PC	Food Pantry Program	5,000
COWBOYS FOR CANCER RESEARCH INC PO BOX 202 DONA ANA, NM 88032	N/A	PC	General & Unrestricted	500
CREATIVE LIVING INC 150 W 10TH AVE COLUMBUS, OH 43201	N/A	PC	General & Unrestricted	750
CRIPPLED CHILDRENS FOUNDATION 2019 4TH AVE N BIRMINGHAM, AL 35203	N/A	PC	General & Unrestricted	2,500
<b>Total . . . . .</b> ►				459,440
<b>3a</b>				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

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)				
a Paid during the year				
CYSTIC FIBROSIS FOUNDATION 2302 PARKLAKE DR NE STE 210 ATLANTA, GA 30345	N/A	PC	General & Unrestricted	3,500
DALLAS FOUNDATION A TX NONPROFIT CORPORATION 3963 MAPLE AVE STE 390 DALLAS, TX 75219	N/A	PC	The Line of Duty Fund	10,000
DESTINATION IMAGINATION INC 1111 S UNION AVE CHERRY HILL, NJ 08002	N/A	PC	General & Unrestricted	2,500
DRAVET SYNDROME FOUNDATION INC PO BOX 3026 CHERRY HILL, NJ 08034	N/A	PC	General & Unrestricted	500
DREAMCATCHERS NEW HAMPSHIRE 119 WILSON HILL RD NEW BOSTON, NH 03070	N/A	PC	Abilities Development Program	3,300
EXCHANGE CLUB FAMILY CENTER INC 139 THOMPSON LN NASHVILLE, TN 37211	N/A	PC	General & Unrestricted	500
FAMILY CENTERS INC 40 ARCH ST GREENWICH, CT 06830	N/A	PC	administering Literacy Volunteers Program	10,000
FEED MY STARVING CHILDREN 401 93RD AVE NW COON RAPIDS, MN 55433	N/A	PC	General & Unrestricted	500
FOLDS OF HONOR FOUNDATION 5800 N PATRIOT DR OWASSO, OK 74055	N/A	PC	General & Unrestricted	500
FOOD BANK FOR NEW YORK CITY 39 BROADWAY 10TH FL NEW YORK, NY 10006	N/A	PC	General & Unrestricted	500
FRIENDSHIP HOME OF LINCOLN PO BOX 85358 LINCOLN, NE 68501	N/A	PC	General & Unrestricted	3,000
FRIENDSHIP SERVICE CENTER INC PO BOX 1896 NEW BRITAIN, CT 06051	N/A	PC	General & Unrestricted	2,000
GIGIS PLAYHOUSE INC 4914 LOOK KINNEY CIR LIVERPOOL, NY 13088	N/A	PC	Literacy Program	2,100
GREEN EARTH PLAYERS INC PO BOX 856 LUVERNE, MN 56156	N/A	PC	General & Unrestricted	2,500
GREENWICH EMERGENCY MEDICAL SERVICE INCORPORATED 1111 E PUTNAM AVE RIVERSIDE, CT 06878	N/A	PC	General & Unrestricted	10,000
Total . . . . . ►				459,440
3a				

Form 990FP Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

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)				
a Paid during the year				
GREENWICH HOSPITAL 5 PERRYRIDGE RD GREENWICH, CT 06830	N/A	PC	Cardiovascular Services Program	25,000
GREENWICH LIBRARY 101 W PUTNAM AVE GREENWICH, CT 06830	N/A	PC	General & Unrestricted	10,000
HANDS ON HARTFORD INC 55 BARTHOLOMEW AVE HARTFORD, CT 06106	N/A	PC	General & Unrestricted	1,200
HARDY GIRLS HEALTHY WOMEN INC PO BOX 821 WATERVILLE, ME 04903	N/A	PC	Girls Coalition Group	3,000
HEPHZIBAH CHILDRENS ASSOCIATION 1144 LAKE ST OAK PARK, IL 60301	N/A	PC	General & Unrestricted	5,000
HOPE MINISTRIES PO BOX 862 DES MOINES, IA 50304	N/A	PC	General & Unrestricted	5,000
HORACE MANN EDUCATIONAL ASSOCIATES INC 8 FORGE PARK E FRANKLIN, MA 02038	N/A	PC	Educational Training for Disabled	2,400
IOWA COLLEGE FOUNDATION 505 5TH AVE STE 1034 DES MOINES, IA 50309	N/A	PC	General & Unrestricted	3,000
JA WORLDWIDE 200 CONNECTICUT AVE NORWALK, CT 06854	N/A	PC	General & Unrestricted	2,500
JDRF INTERNATIONAL 26 BROADWAY 14TH FL NEW YORK, NY 10004	N/A	PC	Northern New Jersey and Rockland County Chapter	10,000
JOHN BROCKINGTON FOUNDATION 1835 FORT STOCKTON DR SAN DIEGO, CA 92103	N/A	PC	General & Unrestricted	5,000
JUNIOR ACHIEVEMENT OF NORTHERN NEW ENGLAND 400 5TH AVE STE 300 WALTHAM, MA 02451	N/A	PC	Elementary and High School Program	2,400
JUNIOR LEAGUE OF GREENWICH CONN INC 231 E PUTNAM AVE GREENWICH, CT 06830	N/A	PC	General & Unrestricted	2,500
KIDS IN CRISIS INC 1 SALEM ST COS COB, CT 06807	N/A	PC	Community Education Program	1,200
KING STREET CENTER INC PO BOX 1615 179 S WINOOSKI AVE BURLINGTON, VT 05401	N/A	PC	Teen Futures Program	3,200
Total . . . . . ►				459,440
3a				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

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)				
a Paid during the year				
L U K CRISIS CENTER INC 545 WESTMINSTER ST FITCHBURG, MA 01420	N/A	PC	General & Unrestricted	2,400
LAKEVIEW PANTRY 3945 N SHERIDAN RD CHICAGO, IL 60613	N/A	PC	General & Unrestricted	500
LOVELANE SPECIAL NEEDS HORSEBACK RIDING PROGRAM IN 40 BAKER BRIDGE RD LINCOLN, MA 01773	N/A	PC	Special Needs Child Development Program	1,700
LUND FAMILY CENTER INC PO BOX 4009 BURLINGTON, VT 05406	N/A	PC	Reach Up & Job Training Program	2,200
LUVERNE AREA COMMUNITY FOUNDATION PO BOX 623 LUVERNE, MN 56156	N/A	PC	Rock County Historical Society	2,500
LUVERNE AREA COMMUNITY FOUNDATION PO BOX 623 LUVERNE, MN 56156	N/A	PC	Luverne Fire Department Fund	1,000
LUVERNE AREA COMMUNITY FOUNDATION PO BOX 623 LUVERNE, MN 56156	N/A	PC	Ashby Bike Path Project	2,500
LYMPHOMA RESEARCH FOUNDATION 115 BROADWAY 13TH FL NEW YORK, NY 10006	N/A	PC	General & Unrestricted	1,000
MAINE ADAPTIVE SPORTS & RECREATION 8 SUNDANCE LN NEWRY, ME 04261	N/A	PC	Veteran No Boundaries Program	4,000
MAINE BOYS TO MEN 565 CONGRESS ST STE 206A PORTLAND, ME 04101	N/A	PC	Community Conversations Program	3,600
MAINE PARENT FEDERATION INC PO BOX 2067 AUGUSTA, ME 04338	N/A	PC	SPIN Program	4,000
MAKE A WISH FOUNDATION OF OREGON INC 2000 SW 1ST AVE STE 410 PORTLAND, OR 97201	N/A	PC	General & Unrestricted	1,500
MAKE-A-WISH FOUNDATION OF MISSOURI INC 13523 BARRETT PKWY DR STE 241 BALLWIN, MO 63021	N/A	PC	General & Unrestricted	500
MANHATTAN INSTITUTE FOR POLICY RESEARCH INC 52 VANDERBILT AVE NEW YORK, NY 10017	N/A	PC	General & Unrestricted	12,500
MEALS FROM THE HEARTLAND 357 LINCOLN ST WDM, IA 50265	N/A	PC	General & Unrestricted	5,000
Total . . . . . ►				459,440
3a				

Form 990FP Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

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)				
a Paid during the year				
MERIDIAN COMMUNITY COLLEGE FDN 910 HWY 19 N MERIDIAN, MS 39307	N/A	PC	General & Unrestricted	1,000
MOURNING HOPE 4919 BALDWIN AVE LINCOLN, NE 68504	N/A	PC	General & Unrestricted	2,500
MY SISTERS PLACE INC 102 PLINY PL HARTFORD, CT 06120	N/A	PC	General & Unrestricted	1,500
N Y POLICE AND FIRE WIDOWS & CHILDRENS BENEFIT FUN 767 5TH AVE NEW YORK, NY 10153	N/A	PC	General & Unrestricted	10,000
NEW HAMPSHIRE FOOD BANK PO BOX 9510 MANCHESTER, NH 03108	N/A	PC	Recipe for Success Culinary Job Training Program	4,100
NEW HORIZONS FOR NEW HAMPSHIRE INC 199 MANCHESTER ST MANCHESTER, NH 03103	N/A	PC	Angie's Shelter for Women Program	3,300
NEW YORK UNIVERSITY SCHOOL OF MEDICINE ONE PARK AVE 17TH FL NEW YORK, NY 10016	N/A	PC	Urology Research	5,000
OCEANS HARBOR HOUSE INC 808 CONIFER ST TOMS RIVER, NJ 08753	N/A	PC	General & Unrestricted	500
OUR FATHERS HOUSE INC PO BOX 7251 FITCHBURG, MA 01420	N/A	PC	General & Unrestricted	1,700
OVERLAKE SERVICE LEAGUE 13122 NE 20TH ST 100 BELLEVUE, WA 98005	N/A	PC	General & Unrestricted	3,000
PEDIATRIC BRAIN TUMOR FOUNDATION OF THE UNITED STA 302 RIDGEFIELD CT ASHEVILLE, NC 28806	N/A	PC	General & Unrestricted	2,500
PENOBSCOT THEATRE COMPANY 131 MAIN ST BANGOR, ME 04401	N/A	PC	Dramatic Academy Program	5,000
PHOENIX GOSPEL MISSION 1468 N 26TH AVE PHOENIX, AZ 85009	N/A	PC	General & Unrestricted	2,000
PINE TREE SOCIETY FOR HANDICAPPED CHILDREN & ADULT 149 FRONT ST BATH, ME 04530	N/A	PC	Scarborough Pine Tree Campers Program	5,700
PINKY SWEAR FOUNDATION 7835 TELEGRAPH RD BLOOMINGTON, MN 55438	N/A	PC	General & Unrestricted	1,500
Total . . . . . ► 3a				459,440

Form 990FP Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

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)				
a Paid during the year				
PLUS FOUNDATION 5353 WAYZATA BLVD STE 600 MINNEAPOLIS, MN 55416	N/A	SO I	General & Unrestricted	1,000
RENSELAER BOYS CLUB INCORPORATED 544 BROADWAY RENSELAER, NY 12144	N/A	PC	After School Express Program	2,000
RIVERS OF RECOVERY INC - CONNECTICUT CHAPTER 22 RUSSELL RD NORTH HAVEN, CT 06473	N/A	PC	General & Unrestricted	1,500
SAN DIEGO YOUTH SERVICES 3255 WING ST SAN DIEGO, CA 92110	N/A	PC	General & Unrestricted	5,000
SEVERAL SOURCES FOUNDATION INC 300 AIRMOUNT AVE RAMSEY, NJ 07446	N/A	PC	General & Unrestricted	1,000
SOCIETY OF ST VINCENT DE PAUL SOUTH WEST IDAHO DIS 3217 W OVERLAND RD BOISE, ID 83705	N/A	PC	Food Pantry and Community Dining Room	3,000
SOLDIERS ANGELS 2700 NE LOOP 410 STE 310 SAN ANTONIO, TX 78217	N/A	PC	General & Unrestricted	3,000
SPIERINGS CANCER FOUNDATION 700 HARVEST TRL APPLETON, WI 54913	N/A	PC	General & Unrestricted	2,500
ST JOHNS UNIVERSITY - SCHOOL OF RISK MANAGEMENT 101 ASTOR PL RM 259 NEW YORK, NY 10003	N/A	PC	General & Unrestricted	50,000
ST MARYS FOOD BANK ALLIANCE 2831 N 31ST AVE PHOENIX, AZ 85009	N/A	PC	General & Unrestricted	4,000
SUMMER ON THE HILL 4440 TIBBETT AVE RIVERDALE, NY 10471	N/A	PC	General & Unrestricted	250
SUSAN L CURTIS CHARITABLE FOUNDATION 1321 WASHINGTON AVE STE 104 PORTLAND, ME 04103	N/A	PC	Camp Susan Curtis Fund	7,500
TABITHA INC 4720 RANDOLPH ST LINCOLN, NE 68510	N/A	PC	Meals on Wheels Program	3,000
THE ALFRED E SMITH MEMORIAL FOUNDATION 1011 1ST AVE STE 1400 New YORK, NY 10022	N/A	PC	General & Unrestricted	1,000
THE BANQUET 900 E 8TH ST SIOUX FALLS, SD 57103	N/A	PC	General & Unrestricted	2,500
Total . . . . . ►				459,440
3a				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

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)				
a Paid during the year				
THE BRIDGE INC 248 W 108TH ST NEW YORK, NY 10025	N/A	PC	General & Unrestricted	1,000
THE PARENT PROJECT FOR MUSCULAR DYSTROPHY RESEARCH 401 HACKENSACK AVE 9TH FL HACKENSACK, NJ 07601	N/A	PC	General & Unrestricted	870
TRI-COUNTY LITERACY 34 WING FARM PKWY BATH, ME 04530	N/A	PC	Read with Me Program	3,600
UNITED CARE USA 613 COLTS NECK CT COLLEYVILLE, TX 76034	N/A	PC	General & Unrestricted	500
UNITED WAY INC PO BOX 15200 PORTLAND, ME 04112	N/A	PC	Westbrook Children's Project	5,000
UNITED WAY OF GREENWICH INC 1 LAFAYETTE COURT GREENWICH, CT 06830	N/A	PC	Greenwich Campership Program	2,500
UNIVERSITY OF COLORADO FOUNDATION-DENVER CAMPUS PO BOX 17126 DENVER, CO 80217	N/A	PC	Business School Risk Management and Insurance Program	5,000
VARIETY THE CHILDRENS CHARITY OF IOWA 505 5TH AVE STE 310 DES MOINES, IA 50309	N/A	PC	General & Unrestricted	2,000
VETERAN HOMESTEAD INC 69 HIGH ST REAR DOOR FITCHBURG, MA 01420	N/A	PC	Veteran Victory Farm Program	3,300
VETERANS INC 69 GROVE ST WORCESTER, MA 01605	N/A	PC	employment and Training Program	1,700
VOLUNTEER CENTER OF SONOMA COUNTY INC 153 STONY CIR STE 100 SANTA ROSA, CA 95401	N/A	PC	General & Unrestricted	2,500
WASHINGTON LEGAL FOUNDATION 2009 MASSACHUSETTS AVE NW WASHINGTON, DC 20036	N/A	PC	General & Unrestricted	15,000
WEBSTER HOUSE 135 WEBSTER ST MANCHESTER, NH 03104	N/A	PC	General & Unrestricted	4,100
WINTERKIDS EDUCATION FOUNDATION 120 EXCHANGE ST PORTLAND, ME 04112	N/A	PC	General & Unrestricted	3,000
WWP INC - WOUNDED WARRIOR PROJECT INC 4899 BELFORT RD STE 300 JACKSONVILLE, FL 32256	N/A	PC	General & Unrestricted	750
Total . . . . . ► 3a				459,440

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
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</b> <i>Paid during the year</i>				
YOUNG MENS CHRISTIAN ASSN OF BOISE 1177 W STATE ST BOISE, ID 83702	N/A	PC	Strong Kids Campaign	3,000
YOUTH EMERGENCY SERVICES & SHELTER OF IOWA 918 SE 11TH ST DES MOINES, IA 50309	N/A	PC	General & Unrestricted	5,000
<b>Total . . . . . ▶</b> <b>3a</b>				459,440

**Note:** To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

## **TY 2016 Depreciation Schedule**

**Name:** WR Berkley Corporation Charitable  
Foundation

**EIN:** 36-4516560

**TY 2016 LiquidationExplanationStmt**

**Name:** WR Berkley Corporation Charitable  
Foundation

**EIN:** 36-4516560

**Statement:** This statement is submitted to report the distribution of certain assets during the year. The distributions resulted in a substantial contraction of assets. The following information is submitted in accordance with Treasury Regulation Section 1.6043-3(a)(1) and the Form 990-PF instructions: During the taxable year ending December 31, 2016, the Foundation made distributions from assets from sources other than current income. Collectively, the distributions in excess of current income totaled \$459,440. This amount represents over 25% of the Foundation's net assets of \$400,660 (as measured by fair market value) at the beginning of the Foundation's taxable year ending December 31, 2016. Although the Foundation technically experienced a substantial contraction, it will continue in existence and has no plans for dissolution. The Foundation made distributions of cash to the grantees listed in the attachment to Part XV, Line 3a; each such grant was made solely for the charitable purpose specified therein.

**TY 2016 Other Expenses Schedule**

**Name:** WR Berkley Corporation Charitable  
Foundation

**EIN:** 36-4516560

**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Administrative Fees	3,952			3,952
State or Local Filing Fees	25			25

<b>Schedule B</b> (Form 990, 990-EZ, or 990-PF) <small>Department of the Treasury Internal Revenue Service</small>	<b>Schedule of Contributors</b>  ▶ <b>Attach to Form 990, 990-EZ, or 990-PF</b> ▶ <b>Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at <u>www.irs.gov/form990</u>.</b>	OMB No 1545-0047  <b>2016</b>
	<b>Name of the organization</b> WR Berkley Corporation Charitable Foundation	<b>Employer identification number</b> 36-4516560

**Organization type** (check one)

<b>Filers of:</b>	<b>Section:</b>
Form 990 or 990-EZ	<input type="checkbox"/> 501(c)( ) (enter number) organization
	<input type="checkbox"/> 4947(a)(1) nonexempt charitable trust <b>not</b> treated as a private foundation
	<input type="checkbox"/> 527 political organization
Form 990-PF	<input checked="" type="checkbox"/> 501(c)(3) exempt private foundation
	<input type="checkbox"/> 4947(a)(1) nonexempt charitable trust treated as a private foundation
	<input type="checkbox"/> 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.  
**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

**General Rule**

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

**Special Rules**

☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33<sup>1</sup>/<sub>3</sub>% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. . . . . ▶ \$ \_\_\_\_\_

**Caution.** An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

<b>Name of organization</b> WR Berkley Corporation Charitable Foundation	<b>Employer identification number</b> 36-4516560
--	---

<b>Part I</b> <b>Contributors</b> (see instructions) Use duplicate copies of Part I if additional space is needed			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	Berkley Insurance Co 475 Steamboat Rd  Greenwich, CT06830	\$ 259,592	<b>Person</b> <input checked="" type="checkbox"/> <b>Payroll</b> <input type="checkbox"/> <b>Noncash</b> <input type="checkbox"/> (Complete Part II for noncash contributions )
-		\$	<b>Person</b> <input type="checkbox"/> <b>Payroll</b> <input type="checkbox"/> <b>Noncash</b> <input type="checkbox"/> (Complete Part II for noncash contributions )
-		\$	<b>Person</b> <input type="checkbox"/> <b>Payroll</b> <input type="checkbox"/> <b>Noncash</b> <input type="checkbox"/> (Complete Part II for noncash contributions )
-		\$	<b>Person</b> <input type="checkbox"/> <b>Payroll</b> <input type="checkbox"/> <b>Noncash</b> <input type="checkbox"/> (Complete Part II for noncash contributions )
-		\$	<b>Person</b> <input type="checkbox"/> <b>Payroll</b> <input type="checkbox"/> <b>Noncash</b> <input type="checkbox"/> (Complete Part II for noncash contributions )
-		\$	<b>Person</b> <input type="checkbox"/> <b>Payroll</b> <input type="checkbox"/> <b>Noncash</b> <input type="checkbox"/> (Complete Part II for noncash contributions )
-		\$	<b>Person</b> <input type="checkbox"/> <b>Payroll</b> <input type="checkbox"/> <b>Noncash</b> <input type="checkbox"/> (Complete Part II for noncash contributions )
-		\$	<b>Person</b> <input type="checkbox"/> <b>Payroll</b> <input type="checkbox"/> <b>Noncash</b> <input type="checkbox"/> (Complete Part II for noncash contributions )
-		\$	<b>Person</b> <input type="checkbox"/> <b>Payroll</b> <input type="checkbox"/> <b>Noncash</b> <input type="checkbox"/> (Complete Part II for noncash contributions )

36-4516560

## Schedule B (Form 990, 990-EZ, or 990-PF) (2016)

<b>Name of organization</b> WR Berkley Corporation Charitable Foundation	<b>Employer identification number</b> 36-4516560
--	---

<b>Part III</b>	<b>Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ▶ \$ _____</b> Use duplicate copies of Part III if additional space is needed
-----------------	--

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	