

Form **990-PF****Return of Private Foundation**
or Section 4947(a)(1) Trust Treated as Private Foundation

OMB No 1545-0052

2016Department of the Treasury
Internal Revenue ServiceDo not enter social security numbers on this form as it may be made public.
Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

Open to Public Inspection

For calendar year 2016 or tax year beginning , and ending

Name of foundation THE SCHOENBAUM FAMILY FOUNDATION, INC.		A Employer identification number 65-0043921
Number and street (or P.O. box number if mail is not delivered to street address) P.O. BOX 580	Room/suite	B Telephone number (see instructions) 941-366-1708
City or town, state or province, country, and ZIP or foreign postal code SARASOTA FL 34230-0580		C If exemption application is pending, check here <input checked="" 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) \$ 18,920,815	J Accounting method. <input type="checkbox"/> Cash <input checked="" 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) (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)	4,988,747			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	47,666	47,666		
	4 Dividends and interest from securities	433,453	433,453		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	-190,222			
	b Gross sales price for all assets on line 6a 7,305,428				
	7 Capital gain net income (from Part IV, line 2)				
	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) (attach schedule)					
11 Other income (attach schedule) STMT 1	4,816	4,861			
12 Total. Add lines 1 through 11	5,284,460	485,980	0		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc.	0			
	14 Other employee salaries and wages	21,200			21,200
	15 Pension plans, employee benefits	2,659			2,659
	16a Legal fees (attach schedule) SEE STMT 2	1,427			1,427
	b Accounting fees (attach schedule) STMT 3	5,500	5,500		
	c Other professional fees (attach schedule) STMT 4	36,391	36,391		
	17 Interest	1,706	1,706		
	18 Taxes (attach schedule) (see instructions) STMT 5	11,103	2,613		
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings	989			989
	22 Printing and publications				
	23 Other expenses (att sch) STMT 6	19,232	9,944		9,288
	24 Total operating and administrative expenses. Add lines 13 through 23	100,207	56,154	0	35,563
	25 Contributions, gifts, grants paid	942,704			942,704
26 Total expenses and disbursements. Add lines 24 and 25	1,042,911	56,154	0	978,267	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	4,241,549				
b Net investment income (if negative, enter -0-)		429,826			
c Adjusted net income (if negative, enter -0-)			0		

For Paperwork Reduction Act Notice, see instructions.

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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	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash – non-interest-bearing	55,195	23,242	23,242
	2	Savings and temporary cash investments	974,945	9,751,100	9,751,100
	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 (att. schedule) ▶ Less: allowance for doubtful accounts ▶	0		
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges	14,500	670	670
	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 sch.) ▶			
	12	Investments – mortgage loans			
	13	Investments – other (attach schedule) SEE STATEMENT 7	12,402,661	4,081,265	8,894,658
	14	Land, buildings, and equipment basis ▶ Less: accumulated depreciation (attach sch.) ▶			
Liabilities	15	Other assets (describe ▶ SEE STATEMENT 8)		251,145	251,145
	16	Total assets (to be completed by all filers – see the instructions. Also, see page 1, item I)	13,447,301	14,107,422	18,920,815
	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
Net Assets or Fund Balances	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ SEE STATEMENT 9)	557	1,594	
	23	Total liabilities (add lines 17 through 22)	557	1,594	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ▶ <input type="checkbox"/>			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input checked="" type="checkbox"/>			
	27	Capital stock, trust principal, or current funds	13,446,744	14,105,828	
	28	Paid-in or capital surplus, or land, bldg., and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
Net Assets or Fund Balances	30	Total net assets or fund balances (see instructions)	13,446,744	14,105,828	
	31	Total liabilities and net assets/fund balances (see instructions)	13,447,301	14,107,422	

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	13,446,744
2	Enter amount from Part I, line 27a	2	4,241,549
3	Other increases not included in line 2 (itemize) ▶ SEE STATEMENT 10	3	28,831
4	Add lines 1, 2, and 3	4	17,717,124
5	Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 11	5	3,611,296
6	Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 30	6	14,105,828

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs. MLC Co.)		(b) How acquired P – Purchase D – Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a SEE WORKSHEET				
b				
c				
d				
e				

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

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	<div style="border: 1px solid black; padding: 2px;"> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div>	2	-190,222
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8	<div style="border: 1px solid black; padding: 2px;"> If gain, also enter in Part I, line 8, column (c) (see instructions). If (loss), enter -0- in Part I, line 8 </div>	3	-294,520

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	969,433	15,357,985	0.063122
2014	834,491	15,578,764	0.053566
2013	816,167	15,240,432	0.053553
2012	1,092,220	15,318,036	0.071303
2011	755,613	16,182,052	0.046695

2 Total of line 1, column (d)	2	0.288239
3 Average distribution ratio for the 5-year base period – divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.057648
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	16,896,343
5 Multiply line 4 by line 3	5	974,040
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	4,298
7 Add lines 5 and 6	7	978,338
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.	8	978,267

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)		1	8,597
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			
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	8,597
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	8,597
6 Credits/Payments:			
a 2016 estimated tax payments and 2015 overpayment credited to 2016	6a	9,160	
b Exempt foreign organizations – tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c	2,000	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	11,160	
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	2,563	
11 Enter the amount of line 10 to be: Credited to 2017 estimated tax <input type="checkbox"/> 2,563 Refunded <input type="checkbox"/>	11		

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. <input type="checkbox"/> \$ _____ (2) On foundation managers. <input type="checkbox"/> \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input type="checkbox"/> \$ _____		
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) <input type="checkbox"/> FL		
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 SEE STMT 12		X
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11	X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12	X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X
14 The books are in care of ► JEFFREY F. SCHOENBAUM Telephone no ► 941-366-1708 PO BOX 580 Located at ► SARASOTA FL ZIP+4 ► 34230-0580		
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	
16 At any time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►	16	X

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<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? (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.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A	1b
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?	N/A	1c
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)).		
a At the end of tax year 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016? If "Yes," list the years ► 20 , 20 , 20 , 20	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions)	N/A	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 20 , 20 , 20 , 20		
3a 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 If "Yes," did it have excess business holdings in 2016 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2016)	N/A	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		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?		X

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

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

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).**

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 13				

2 Compensation of five highest-paid employees (other than those included on line 1 – see instructions). 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 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."**

(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 (see instructions)

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

	Amount
1 N/A	
2	
All other program-related investments See instructions	
3	

Total. Add lines 1 through 3

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	10,041,567
b	Average of monthly cash balances	1b	6,855,076
c	Fair market value of all other assets (see instructions)	1c	251,815
d	Total (add lines 1a, b, and c)	1d	17,148,458
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	17,148,458
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	257,227
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	16,891,231
6	Minimum investment return. Enter 5% of line 5	6	844,562

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

1	Minimum investment return from Part X, line 6	1	844,562
2a	Tax on investment income for 2016 from Part VI, line 5	2a	4,298
b	Income tax for 2016. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	4,298
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	840,264
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	840,264
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	840,264

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc. – total from Part I, column (d), line 26	1a	978,267
b	Program-related investments – total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	978,267
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions)	5	4,298
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	973,969

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2015	(c) 2015	(d) 2016
1 Distributable amount for 2016 from Part XI, line 7				836,220
2 Undistributed income, if any, as of the end of 2016:				
a Enter amount for 2015 only				
b Total for prior years: 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2016:				
a From 2011				
b From 2012				333,797
c From 2013				66,934
d From 2014				69,871
e From 2015				206,849
f Total of lines 3a through e	677,451			
4 Qualifying distributions for 2016 from Part XII, line 4: \$ 978,267				
a Applied to 2015, but not more than line 2a				
b Applied to undistributed income of prior years (Election required – see instructions)				
c Treated as distributions out of corpus (Election required – see instructions)				
d Applied to 2016 distributable amount				836,220
e Remaining amount distributed out of corpus	142,047			
5 Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e. Subtract line 5	819,498			
b Prior years' undistributed income. Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b. Taxable amount – see instructions				
e Undistributed income for 2015. Subtract line 4a from line 2a Taxable amount – see instructions				
f Undistributed income for 2016. Subtract lines 4d and 5 from line 1 This amount must be distributed in 2017				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required—see instructions)				
8 Excess distributions carryover from 2011 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	819,498			
10 Analysis of line 9:				
a Excess from 2012				333,797
b Excess from 2013				66,934
c Excess from 2014				69,871
d Excess from 2015				206,849
e Excess from 2016				142,047

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year SEE STATEMENT 14				942,704
Total			▶ 3a	942,704
b Approved for future payment N/A				
Total			▶ 3b	

Enter gross amounts unless otherwise indicated.

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

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

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.

▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at www.irs.gov/form990.

OMB No 1545-0047

2016

Name of the organization

**THE SCHOENBAUM FAMILY
FOUNDATION, INC.**

Employer identification number

65-0043921

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)() (enter number) organization

☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

☐ 527 political organization

Form 990-PF

☒ 501(c)(3) exempt private foundation

☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation

☐ 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 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 33¹/₃ % 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. Don't 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 isn't covered by the General Rule and/or the Special Rules doesn't 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 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF.

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

Name of organization

THE SCHOENBAUM FAMILY

Employer identification number

65-0043921

Part I Contributors (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	BETTY SCHOENBAUM 340 S. PALM AVENUE, PENTHOUSE #162 SARASOTA FL 34236	\$ 4,988,747	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)

Name of organization

THE SCHOENBAUM FAMILY

Employer identification number

65-0043921

Part II Noncash Property (See instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	410 SHARES BECTON DICKINSON & CO	\$ 65,120	04/18/16
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	10,000 SHARES OF CARNIVAL CORP	\$ 510,850	04/18/16
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	15,000 SHARES OF DFA REAL ESTATE	\$ 514,350	04/20/16
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	34,200 SHARES MARRIOTT INTL INC.	\$ 2,299,694	04/18/16
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	6,928 SHARES MARRIOTT VACATIONS	\$ 461,751	04/18/16
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	1,000 SHARES NIKE INC.	\$ 59,690	04/18/16

Name of organization

THE SCHOENBAUM FAMILY

Employer identification number

65-0043921

Part II Noncash Property (See instructions). Use duplicate copies of Part II if additional space is needed.

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	550 SHARES OF NOVO NORDISK	\$ 30,899	04/18/16
1	50 SHARES NOVO NORDISK	\$ 2,834	04/18/16
1	585 SHARES OMNICOM GROUP	\$ 49,509	04/18/16
1	11,947 SHARES TARGET CORP	\$ 994,050	04/18/16
		\$	
		\$	

Form 990-PF	Capital Gains and Losses for Tax on Investment Income	2016
For calendar year 2016, or tax year beginning _____, and ending _____		

Name THE SCHOENBAUM FAMILY FOUNDATION, INC.	Employer Identification Number 65-0043921
---	---

(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.)
(1) SCHWAB...8369	P	VARIOUS	VARIOUS
(2) SCHWAB...5055	P	VARIOUS	VARIOUS
(3) SCHWAB...8369	P	01/01/15	12/31/16
(4) SCHWAB...5055	P	01/01/15	12/31/16
(5) OCA IGUANA HEALTHCARE	P	01/01/15	12/31/16
(6) OCA CHESAPEAKE PARTNERS	P	01/01/15	12/31/16
(7) VERITABLE SILVER POINT PARTNERS	P	01/01/15	12/31/16
(8) VERITABLE WCP PARTNERS	P	01/01/15	12/31/16
(9) OCA VAN ECK CONCENTRATED ENERGY	P	VARIOUS	VARIOUS
(10) OCA VAN ECK CONCENTRATED ENERGY	P	01/01/15	12/31/16
(11) OCA STRATEGOS RMBS FUND	P	01/01/15	12/31/16
(12) VERITABLE SILVER POINT PARTNERS	P	01/01/15	12/31/16
(13) ALPHAGEN EUROPEAN FUND	P	VARIOUS	VARIOUS
(14) ALPHAGEN EUROPEAN FUND	P	01/01/15	12/31/16
(15) OCA VAN ECK CON ENERGY	P	01/01/15	12/31/16

(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)
(1) 41,237		44,330	-3,093
(2) 1,101,612		1,339,327	-237,715
(3) 740,690		831,082	-90,392
(4) 4,696,793		4,610,839	85,954
(5) 491,186		500,000	-8,814
(6)		45,486	-45,486
(7) 117,066			117,066
(8) 919		27,807	-26,888
(9) 8,675			8,675
(10) 34,102			34,102
(11) 651			651
(12) 7,500			7,500
(13)		62,387	-62,387
(14)		34,392	-34,392
(15) 60,163			60,163

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) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
(1)			-3,093
(2)			-237,715
(3)			-90,392
(4)			85,954
(5)			-8,814
(6)			-45,486
(7)			117,066
(8)			-26,888
(9)			8,675
(10)			34,102
(11)			651
(12)			7,500
(13)			-62,387
(14)			-34,392
(15)			60,163

Form 990-PF	Capital Gains and Losses for Tax on Investment Income	2016
For calendar year 2016, or tax year beginning , and ending		

Name THE SCHOENBAUM FAMILY FOUNDATION, INC.	Employer Identification Number 65-0043921
---	---

(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)
(1) SCHWAB ..5055			
(2) FIDELITY ...2998			
(3)			
(4)			
(5)			
(6)			
(7)			
(8)			
(9)			
(10)			
(11)			
(12)			
(13)			
(14)			
(15)			

(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)
(1) 135			135
(2) 4,699			4,699
(3)			
(4)			
(5)			
(6)			
(7)			
(8)			
(9)			
(10)			
(11)			
(12)			
(13)			
(14)			
(15)			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(1)			135
(2)			4,699
(3)			
(4)			
(5)			
(6)			
(7)			
(8)			
(9)			
(10)			
(11)			
(12)			
(13)			
(14)			
(15)			

Federal Statements

Statement 1 - Form 990-PF, Part I, Line 11 - Other Income

Description	Revenue per Books	Net Investment Income	Adjusted Net Income
VERITABLE SILVERPOINT PTRS	\$ -4,003	\$ -4,003	\$
ALPHAGEN EUROPEAN	8,864	8,864	
UBTI FROM PARTNERSHIPS	-45		
TOTAL	\$ 4,816	\$ 4,861	\$ 0

Statement 2 - Form 990-PF, Part I, Line 16a - Legal Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
LEGAL FEES	\$ 1,427	\$	\$	\$ 1,427
TOTAL	\$ 1,427	\$ 0	\$ 0	\$ 1,427

Statement 3 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
ACCOUNTING FEES	\$ 5,500	\$ 5,500	\$	\$
TOTAL	\$ 5,500	\$ 5,500	\$ 0	\$ 0

Statement 4 - Form 990-PF, Part I, Line 16c - Other Professional Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
INVESTMENT MANAGEMENT FEES..8369	\$ 27,079	\$ 27,079	\$	\$
OFFIT CAPITAL	6,678	6,678		
FIERA CAPITAL	2,634	2,634		
TOTAL	\$ 36,391	\$ 36,391	\$ 0	\$ 0

Federal Statements

Statement 5 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
FOREIGN TAX WITHHELD	\$ 2,613	\$ 2,613	\$	\$
FEDERAL EXCISE TAX	8,490			
TOTAL	\$ 11,103	\$ 2,613	0	0

Statement 6 - Form 990-PF, Part I, Line 23 - Other Expenses

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
EXPENSES				
BANK CHARGES	159			159
DUES AND SUBSCRIPTIONS	234			234
INSURANCE	1,515			1,515
LICENSES AND PERMITS	61			61
OTHER EXPENSES	5,200			5,200
POSTAGE	79			79
TELEPHONE	2,040			2,040
OCA VAN ECK CONCENTRATED K-1	1,259	1,259		
OCA STRATEGOS RMBS K-1	8,232	8,232		
VERITABLE SILVER POINT PARTNE	453	453		
TOTAL	\$ 19,232	\$ 9,944	0	\$ 9,288

Statement 7 - Form 990-PF, Part II, Line 13 - Other Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
OCA SACHEM HEAD OFFSHORE	\$ 630,000	\$ 630,000	COST	\$ 644,838
OCA CHESAPEAKE PARTNERS	470,000			
OCA STRATEGOS RMBS	897,273	555,930	COST	674,123
OCA MEZZANINE	135,650	188,764	COST	269,305
MILLENIUM INTL LTD	750,000	750,000	COST	1,099,163
SENATOR GLOBAL OPP FD	500,000	500,000	COST	674,625
GCP SPV LTD	57,977	57,977	COST	10,054
VERITABLE SILVER POINT	-108,644			

Federal Statements

Statement 7 - Form 990-PF, Part II, Line 13 - Other Investments (continued)

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
	\$	\$		\$
VERITABLE WCP PTRS	20,778			
OCA IGUANA HEALTHCARE	500,000			
OCA OHA CREDIT FUND LLC	900,000			
OCA VAN ECK CONCENTRATED ENERGY	358,962			
ALPHA GEN EUROPEAN BEST IDEAS FD	770,604			
SCHWAB...5055	5,644,649			
SCHWAB...8369	875,412			
DFA REAL ESTATE		424,077	COST	533,510
BECTON DICKINSON CO		30,044	COST	67,876
CARNIVAL CORP		217,800	COST	520,600
MARRIOTT VACATIONS WORLDWIDE		59,487	COST	587,841
MARRIOTT INTENATIONAL INC		486,756	COST	2,827,656
NIKE INC CLASS B		22,269	COST	50,830
NOVO-NORDISK		20,091	COST	21,516
OMNICOM GROUP		27,094	COST	49,789
TARGET CORP		110,976	COST	862,932
TOTAL	\$ 12,402,661	\$ 4,081,265		\$ 8,894,658

Federal Statements**Statement 8 - Form 990-PF, Part II, Line 15 - Other Assets**

<u>Description</u>	<u>Beginning of Year</u>	<u>End of Year</u>	<u>Fair Market Value</u>
REDEMPTION HOLDBACKS RECEIVABLE	\$ <u> </u>	\$ <u>251,145</u>	\$ <u>251,145</u>
TOTAL	\$ <u> 0</u>	\$ <u>251,145</u>	\$ <u>251,145</u>

Statement 9 - Form 990-PF, Part II, Line 22 - Other Liabilities

<u>Description</u>	<u>Beginning of Year</u>	<u>End of Year</u>
PAYROLL LIABILITIES	\$ <u>557</u>	\$ <u>1,594</u>
TOTAL	\$ <u>557</u>	\$ <u>1,594</u>

Statement 10 - Form 990-PF, Part III, Line 3 - Other Increases

<u>Description</u>	<u>Amount</u>
MISC BASIS ADJUSTMENTS	\$ <u>28,831</u>
TOTAL	\$ <u>28,831</u>

Statement 11 - Form 990-PF, Part III, Line 5 - Other Decreases

<u>Description</u>	<u>Amount</u>
PRIOR YEAR FEDERAL TAXES	\$ <u>5,340</u>
CONTRIBUTED STOCK BASIS ADJUSTMENT	<u>3,605,956</u>
TOTAL	\$ <u>3,611,296</u>

Statement 12 - Form 990-PF, Part VII-A, Line 8b - Not Filing with Attorney General
Explanation

Description

FLORIDA ATTORNEY GENERAL DOES NOT REQUIRE AND PREFERS THAT WE DO NOT FURNISH A COPY OF FORM 990-PF TO THEIR OFFICE.

Federal Statements

Statement 13 - Form 990-PF, Part VIII, Line 1 - List of Officers, Directors, Trustees,
Etc.

Name and Address	Title	Average Hours	Compensation	Benefits	Expenses
BETTY JANE SCHOENBAUM PO BOX 580 SARASOTA FL 34230-0580	PRESIDENT	5.00	0	0	0
RAYMOND D. SCHOENBAUM PO BOX 580 SARASOTA FL 34230-0580	SECRETARY	5.00	0	0	0
JEFFREY F. SCHOENBAUM PO BOX 580 SARASOTA FL 34230-0580	TREASURER	5.00	0	0	0
JOANN SCHOENBAUM MILLER PO BOX 580 SARASOTA FL 34230-0580	VICE PRESIDE	5.00	0	0	0
EMILY SCHOENBAUM PO BOX 580 SARASOTA FL 34230-0580	VICE PRESIDE	5.00	0	0	0

Federal Statements**Form 990-PF, Part XV, Line 1a - Managers Who Contributed Over 2% or \$5,000**

<u>Name of Manager</u>	<u>Amount</u>
BETTY J. SCHOENBAUM	\$ <u>4,988,747</u>
TOTAL	\$ <u><u>4,988,747</u></u>

Federal Statements

Statement 14 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the
Year

Name		Address		Relationship	Status	Purpose	Amount
ATLANTA COMMUNITY FOOD BANK		ATLANTA GA 30318		NONE	732 JOSEPH E LOWERY PC	GENERAL CHARITABLE PURPOSES	11,400
BOYS & GIRLS CLUBS OF SARASOTA		SARASOTA FL 34230		NONE	3100 FRUITVILLE ROAD PC	SCHOLARSHIPS SUPPORT	25,000
BREAD FOR THE CITY		WASHINGTON DC 20001		NONE	1525 7TH STREET NW PC	GENERAL CHARITABLE PURPOSES	19,000
CHABAD UGA		ATHENS GA 30605		NONE	1491 S. LUMPKIN ST. PC	CAMPS AND SUMMER ACTIVITIES	1,400
CHILDREN'S GUARDIAN FUND		SARASOTA FL 34230		NONE	P.O. BOX 49722 PC	SCHOLARSHIPS AND FOSTER CARE	5,000
CLEARWATER FREE CLINIC		CLEARWATER FL 33755		NONE	707 N FORT HARRISON AVE PC	FREE CLINIC MEDICATION PROGRAM	8,000
CLOTHES TO KIDS		CLEARWATER FL 33713		NONE	3251 3RD AVENUE NORTH PC	SCHOOL UNIFORMS	10,000
CONGREGATION BETH SHALOM		CLEARWATER FL 33764		NONE	1325 S BELCHER ROAD PC	RENOVATION PROJECT	70,000
COVENANT HOUSE		CHARLESTON WV 25301		NONE	600 SHREWSBURY STREET PC	SUPPORT DAY SHELTER	25,000
GLASSER/SCHOENBAUM HUMAN SVCS		SARASOTA FL 34234		NONE	1750 17TH STREET PC	SUPPORT HUMANITARIAN NEEDS	56,752
JEWISH FAMILY AND CHILDREN'S SVCS		SARASOTA FL 34237		NONE	2688 FRUITVILLE ROAD PC	GENERAL CHARITABLE PURPOSES	75,000
JEWISH FED OF GREATER ATLANTA		ATLANTA GA 30309		NONE	1440 SPRING STREET NW PC	GENERAL CHARITABLE PURPOSES	94,055
JEWISH FED OF SARASOTA-MANATEE		SARASOTA FL 34232		NONE	580 MCINTOSH ROAD PC	ANNUAL CAMPAIGN AND BRIDGE BUILDING	90,000
MOUNTAIN INSTITUTE APPALACHIAN		CIRCLEVILLE WV 26804		NONE	18 WOODLANDS WAY PC	SUMMER STEWARDSHIP	36,888
MOUNTAINEER FOOD BANK		GASSAWAY WV 26624		NONE	484 ENTERPRISE DRIVE PC	PROJECT HARVEST PROGRAM	25,000
NATIONAL COALIT SUPP EURASIAN		WASHINGTON DC 20036		NONE	1120 20TH STREET NW PC	PROMOTE JEWISH COMMUNITIES	2,500
PLANNED PARENTHOOD		SARASOTA FL 34236		NONE	736 CENTRAL AVE PC	HEALTH EDUCATION	1,400
SALVATION ARMY - SARASOTA		SARASOTA FL 34236		NONE	P.O. BOX 2792 PC	PROGRAMS FOR THE NEEDY	35,000
SO OTHERS MIGHT EAT		WASHINGTON DC 20001		NONE	60 O ST NW PC	AFFORDABLE HOUSING FOR POOR IN DC	14,000

Federal Statements

**Statement 14 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the
Year (continued)**

Name		Address		Relationship	Status	Purpose	Amount
TAMPA JCC AND FEDERATION							
TAMPA FL 33625				NONE	13009 COMMUNITY CAMPUS DR PC	PHILANTHROPIC FUND	113,109
WASHINGTON DC JEWISH COMMUNITY				CTR	1529 16TH ST NW		
WASHINGTON DC 20036				NONE	PC	GENERAL SUPPORT	45,000
WORLD ORT					1745 BROADWAY 17TH FL		
NEW YORK NY 10019				NONE	PC	DROPOUT PREVENTION	100,000
ALL FAITHS FOOD BANK					8171 BLAIKIE COURT		
SARASOTA FL 34240				NONE	PC	TO OPEN 3 NEW FOOD PANTRIES	22,800
AVODAH DC					1875 CONNECTICUT AVE NW		
WASHINGTON DC 20009				NONE	PC	GENERAL CHARITABLE PURPOSES	41,600
BEST BUDDIES INTERNATIONAL					200 S HOOVER BLVD		
TAMPA FL 33609				NONE	PC	GENERAL CHARITABLE PURPOSES	1,400
GULF COAST JEWISH FAMILY SVCS					14041 ICOT BLVD		
CLEARWATER FL 33760				NONE	PC	GENERAL CHARITABLE PURPOSES	12,000
YMCA OF AUSTIN, TX					1100 W. CESAR CHAVEZ		
AUSTIN TX 78703				NONE	PC	SCHOLARSHIP PROGRAM	1,400
TOTAL							<u>942,704</u>