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## Form **990-PF**

# TENDED TO NOVEMBER 15, 20 Return of Private Foundation

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

Do not enter social security numbers on this form as it may be made public.

2016

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

ror	caien	dar year 2016 or tax year	Deginning		, and ending		
Nar	ne of	foundation				A Employer identification	number
_ T	HE	LUBERT FAMI	LY FOUNDATI	ON, INC.		66-0639002	
Nun	nber a	nd street (or P O box number if	mail is not delivered to street	address)	Room/suite	B Telephone number	
_ 2	92	9 ARCH STREE	T, 13TH FLO	OR		215-609-34	97
		own, state or province, cou	· ·	ostal code		C If exemption application is p	ending, check here
_ <u>P</u>	HI:	LADELPHIA, P	A 19104				
G	Check	all that apply:	Initial return	Initial return of a fo	rmer public charity	D 1. Foreign organizations	s, check here
			Fınal return	Amended return		2 Foreign organizations ma	setung the 95% took
			Address change	Name change		2 Foreign organizations me check here and attach co	emputation
H C	_		X Section 501(c)(3) ex			E If private foundation sta	
L		ction 4947(a)(1) nonexemp		Other taxable private founda		under section 507(b)(1)	(A), check here
		arket value of all assets at e	·	=	Accrual	F If the foundation is in a	
		Part II, col (c), line 16)		her (specify)		under section 507(b)(1)	)(B), check here
	\$			mn (d) must be on cash b			(4)
LPa	<u>ırt l</u>	Analysis of Revenue and (The total of amounts in colun necessarily equal the amount:	nns (b), (c), and (d) may not	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
	1	Contributions, gifts, grants	s, etc., received		, ,	N/A	
	2	Check X if the foundation	is not required to attach Sch. B			. ==	
	3	Interest on savings and tempor cash investments	rary	54,877.	54,877.		STATEMENT 1
<b>7</b>	4	Dividends and interest from		65,549.	65,549.		STATEMENT 2
7)102	5a	Gross rents	·	3,955.	3,955.		STATEMENT 3
~	Ь	Net rental income or (loss)	3,955.	, , , , , , , , , , , , , , , , , , ,	, ,		
. ~ ⊂> ~	6a	Net gain or (loss) from sale of a	ssets not on line 10	225,125.			
	b	Gross sales price for all assets on line 6a	800,801.	(1)	,	RE	CEIVEU
۽ پي	7	Capital gain net income (from F	Part IV, line 2)	, ' ,	225,125.		72
~	8	Net short-term capital gair	1	· , , ,		S NO	V 1 7 2017 8
	9	Income modifications		, ,	,	88	8
2	10a	Gross sales less returns and allowances		,	` ,		
SCANNEL DEL O Revenue	b	Less Cost of goods sold				QE.	UEN, UI
$\ddot{\mathcal{O}}$	C	Gross profit or (loss)					
ഗ	11	Other income		97,103.	97,103.		STATEMENT 4
	12_	Total. Add lines 1 through	<u> 11</u>	446,609.	446,609.	<u></u>	
	13	Compensation of officers, direct	ctors, trustees, etc	0.	0.		0.
	14	Other employee salaries ai	nd wages				
	15	Pension plans, employee l	benefits			<u></u>	
ses	16a	Legal fees			··		
Expens	Ь	Accounting fees					
Ä	С	Other professional fees					
Admınistrative	17	Interest		20,073.	20,073.		0.
trat	18	Taxes	STMT 5	1,213.	1,213.		0.
nist	19	Depreciation and depletion	1				
<u> </u>	20	Occupancy					
Ā	21	Travel, conferences, and r	neetings				
and	22	Printing and publications					
ng:	23	Other expenses	STMT 6	97,610.	97,610.		0.
Operating	24	Total operating and admi	nistrative				
De l		expenses. Add lines 13 th	rough 23	118,896.	118,896.		0.
0	25	Contributions, gifts, grants	s paid	369,955.			369,955.
	26	Total expenses and disbu	ırsements				
		Add lines 24 and 25		488,851.	118,896.		369,955.
	27	Subtract line 26 from line	12:				
	а	Excess of revenue over expens	ses and disbursements	-42,242.			
	b	Net investment income (if	negative, enter -0-)		327,713.		
	c	Adjusted net income (if ne	gative, enter -0-)			N/A	

623501 11-23-16 LHA For Paperwork Reduction Act Notice, see instructions

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For	m 99	1639002 Page 2			
Part II   Dalance Sneets			Beginning of year	End of	· <del></del>
column should be for end-of-year amounts only			(a) Book Value	(b) Book Value	(c) Fair Market Value
		Cash - non-interest-bearing	54,179.	51,610.	51,610.
		Savings and temporary cash investments			
	3	Accounts receivable ►			
		Less: allowance for doubtful accounts			
	4	Pledges receivable ►			
		Less; allowance for doubtful accounts ▶			<del></del>
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other			
		disqualified persons			
	7	Other notes and loans receivable			
		Less: allowance for doubtful accounts ▶ 0 .	0	50,000.	50,000.
şţ	8	Inventories for sale or use			
Assets	9	Prepaid expenses and deferred charges			
٩	10a	Investments - U.S. and state government obligations			
	b	Investments - corporate stock STMT 7	563,371.	147,722.	147,722.
	C	Investments - corporate bonds			
	11	Investments - land, buildings, and equipment basis			/
		Less accumulated depreciation			
	12	Investments - mortgage loans			
	13	Investments - other STMT 8	6,285,800.	6,643,499.	6,643,499.
	14	Land, buildings, and equipment: basis			
		Less accumulated depreciation			0.076
		Other assets (describe ► STATEMENT 9 )	2,276.	2,276.	2,276.
	16	Total assets (to be completed by all filers - see the		6 005 105	C 005 105
		instructions. Also, see page 1, item I)	6,905,626.	6,895,107.	6,895,107.
		Accounts payable and accrued expenses			
	18	Grants payable			-
es	19	Deferred revenue			
Liabilities	20	Loans from officers, directors, trustees, and other disqualified persons			,
<u>a</u> .		Mortgages and other notes payable			
_	22	Other liabilities (describe )			
_	23_	Total liabilities (add lines 17 through 22)	0.	0.	
		Foundations that follow SFAS 117, check here			
s		and complete lines 24 through 26 and lines 30 and 31.			
Net Assets or Fund Balances	24	Unrestricted			
alar	25	Temporarily restricted			
Ä	26	Permanently restricted			
Ĕ	ŀ	Foundations that do not follow SFAS 117, check here			
F		and complete lines 27 through 31.	_		
ţ	27	Capital stock, trust principal, or current funds	0.	0.	
SSe	28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
ţ	29	Retained earnings, accumulated income, endowment, or other funds	6,905,626.	6,895,107.	
Š	30	Total net assets or fund balances	6,905,626.	6,895,107.	•
	31	Total liabilities and net assets/fund balances	6,905,626.	6,895,107.	·
P	art	Analysis of Changes in Net Assets or Fund B	alances		
_					
1		net assets or fund balances at beginning of year - Part II, column (a), line	30		C 00E C0C
		st agree with end-of-year figure reported on prior year's return)		1	6,905,626.
		r amount from Part I, line 27a		2	-42,242.
		r increases not included in line 2 (itemize)   CHANGES IN	ONKEALIZED		31,723.
		lines 1, 2, and 3		4	6,895,107.
		eases not included in line 2 (itemize)		5	0. 6,895,107.
6_	lota	net assets or fund balances at end of year (line 4 minus line 5) - Part II, co	olumn (b), line 30	6_	Form <b>990-PF</b> (2016)
					FULLE 330-F F (2016)

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8

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369,955.

7 Add lines 5 and 6

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 Enter qualifying distributions from Part XII, line 4

Part VI   Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(c), or 4948 - see instructions)		1990-PF (2016) THE LUBERT FAMILY FOUNDATION,						<u>06390</u>			Page 4
Date of Fulling or determination letter:  datable copy of letter if necessary-see instructions)  b Domestic foundations: that meet the section 4940(e) requirements in Part V, cinck here  of Part, Line 27b  All other domestic foundations called 2% of line 27b. Exempt foreign organizations sate 4% of Part I, Line 17, eo. (b).  2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only, Others enter -0-)  3 3, 2, 277.  3 Add lines 1 and 2  3 3, 2, 277.  Subtile 3 (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, Others enter -0-)  4 0.  5 Tax based on investment income Subtract time 4 from line 3. It zero or less, enter -0-  5 Tax based on investment income Subtract time 4 from line 3. It zero or less, enter -0-  5 Tax based on investment income Subtract time 4 from line 3. It zero or less, enter -0-  5 Tax based on investment income Subtract time 4 from line 3. It zero or less, enter -0-  5 Tax based on investment income Subtract time 4 from line 3. It zero or less, enter -0-  5 Tax based on investment income Subtract time 4 from line 3. It zero or less, enter -0-  5 Tax based on investment income Subtract time 4 from line 3. It zero or less, enter -0-  6 Basedy withholding erroneously withheld  7 Total tradits and payments. Add lines 5 aft bourged 6  8 Backay withholding erroneously withheld  9 Tax dee. If the total of lines 5 and 3 is more than line 7, enter amount owed  9 Tax dee. If the total of lines 5 and 3 is more than line 7, enter amount owed  9 Tax dee. If the total of lines 5 and 3 is more than line 7, enter amount owed  9 Tax dee. If the total of lines 5 and 3 is more than line 7, enter amount owed  9 Tax dee. If the total of lines 5 and 3 is more than line 7, enter amount owed  9 Tax dee. If the total of lines 5 and 1 is more than line 7, enter amount owed  9 Tax dee. If the total of lines 5 and 1 is more than line 7, enter amount owed  10 Tax better than amount of line 10 to line 1 certalities 1 is a line 1 lines 1 lines 1 lines 1 lines 1 l						e), or 4	948 -	see in	stru	ctior	1S)
a Domestic foundations that meet the section 4940(e) regularization in Part V, chack here ► X and ontion 1% of Part I, lane 276.  I Part I, lane 276.  All other domestic foundations enter 2% of line 276. Exempt foreign organizations asiste 4% of Part I, lane 12, oct. (b).  2	18					)					
of Part I, Imer 279. All other domestic loandations entite 2% of Imer 27h. Exempt foreign organizations entite 4% of Part I, Ime 12, col. (b).  2 Tax under sections 51 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 3 3, 2, 277. 3 Add lines 1 and 2 4 0. 5 Tax based on investment income. Subtract line 4 from line 3, It zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3, It zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3, It zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3, It zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3, It zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3, It zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3, It zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3, It zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3, It zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3, It zero or less, enter -0- 5 Tax based on line 4 from 200 from 8889) 6 Tax based on line 4 from 200 from 8889. 7 Tax from 1 from 1 from 1 from 10 from 8889. 8 Tax based on line 4 from 200 from 8889. 9 Tax based on line 10 from 10 from 10 from 8889. 9 Tax based on line 10 from 10 from 10 from 10 from 10 from 8889. 9 Tax based on 1 from 10											
An other domestic foundations enter 2% of the 27h. Exampt foreign organizations eater 4% of Part I, lime 12, col. (b).  2	t		·LX	ar	nd enter 1%	P	_1_			3, <u>2</u>	<u> 17.</u>
2											
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5 Tax based on investment income Subtract line 4 from line 3. If zero or less, enter -0.  6 Credists*Pyments;  a 2016 estimated tax payments and 2015 overpayment credited to 2016  b Exempl foreign organizations - tax withhold at source  6 B  6 C Tax paid with application for extension of time to file (Form 8868)  6 B  6 C Tax paid with application for extension of time to file (Form 8868)  6 B  7 O.  9 Total credits and perpients. And lines 5 and 8 is more than the total of lines 5 and 8 is more than the total or lines 5 and 8 is more than the total or lines 5 and 8 is more than the total or lines 5 and 8 is more than the total or lines 5 and 8 is more than the total or lines 5 and 8 is more than the total or lines 5 and 8 is more than the total or lines 5 and 8, nater the amount overpaid  11 First the amount of line 10 to be; Credited to 2017 estimated tax ►  12 During the tax year, dut the foundation attempt to influence any national, state, or local legislation or did it participate or intervere in any political clampaign?  13 During the tax year, dut the foundation attempt to influence any national, state, or local legislation or did it participate or intervere in any political clampaign?  14 During the tax year, dut the foundation attempt to influence any national, state, or local legislation or did it participate or intervere in any political clampaign?  15 During the tax year, dut the foundation attempt to influence any national, state, or local legislation or did it participate or intervere in any political clampaign.  16 During the tax year, dut the foundation attempt to influence any national, state, or local legislation or did it participate or intervere in any political clampaign.  18 During the tax year, dut the foundation attempt to influence any national, state, or local legislation or did it participate or intervere in any political clampaign and year (or the definition)?  19 During the foundation the foundation attended description or influence any national continuence and sender or foundation					•					<u>3,2</u>	
6. Credits/Payments. 2016 estimated tax payments and 2015 overpayment credited to 2016  b Exempt foreign organizations - Lax withhelid at source 1 Eax paid with application for extension of time to the (Form 8868) 6 e 1 A Sacking withholding erroneously withhelid 7 Total credits and payments. Add lines 6 at through 6d 8 P. 2. 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 8 ESE STATEMENT 10 ■ 9 3,3,359. 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Finite rise amount of line 10 to be Credited to 2017 estimated tax Period 11 Part Will-A] Statements Regarding Activities 1 During the axer, add the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any poticical campagin?  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 1 a 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 1 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 1 a or 1b, attach a detailed description of the activities of the connection with the activities 1 Did the foundation he Form 1 120-POL for this year?  If the individual on the Form 1 120-POL for this year?  If the individual on the Form 1 120-POL for this year?  If the remiburisement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ 0.  Either the remiburisement of any applicate payment of the activities 1 Has the foundation made any changes, not previously reported to the IRS; in its governing instrument, articles of incorporation, or bylaws, or other smilar instruments? if "Yes," attach a detailed description of the year?  If Yes, attach a detailed d			thers e	ente	er -0-)						
a 2016 estimated tax payments and 2015 overpayment credited to 2016 b Exempt foreign organizations - tax withheld at source c Tax pard with application for extension of time to the (Form 8868) d Backup withholding erroneously withheld d Total credits and payments. Add lines 6a through 6d Enter any penalty for underpayment of estimated tax. Check here I if Form 2220 is attached Enter any penalty for underpayment of estimated tax. Check here I if Form 2220 is attached Enter any penalty for underpayment of estimated tax. Check here I if Form 2220 is attached Enter the answer it is a formed than the total of lines 5 and 8 is more than the total of lines 5 and 8 is more than the total of lines 5 and 8, nater the amount overpaid  Negroyment. If line 7 is more than the total of lines 5 and 8, nater the amount overpaid  Negroyment. If line 7 is more than the total of lines 5 and 8, nater the amount overpaid  Enter the amount of line 10 to be; Gredited to 2017 estimated tax ▶  Refunded ▶ 11  Part VIII-4; Statements Regarding Activities  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 policical campaign?  1b Old is spend from 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  D ot globe the foundation in Connection in connection with the activities  D ot globe the foundation in Connection on the activities  D ot globe the foundation in a political expenditure (section 4955) imposed during the year:  (1) On the foundation in any activities that have not previously been reported to the IRS?  If "Yes," attach a detailed description of the activities  A last the foundation made any changes, not previously been reported to the IRS?  If "Yes," attach a detailed description							5			3,4	<u>//.</u>
b Exempt toreign organizations - tax withhelid at source  c Tax paid with application for extension of time to file (Form 8868)  d Backep withholding erroneously withheld  7 Total oradits and payments. Add lines 6 at through 6d  7 Total oradits and payments. Add lines 6a through 6d  8 Enter any penalty for underpayment of estimated tax. Check here II (Form 2220 is attached  8 B 2.  9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount ower SEE STATEMENT 1.0 ▶ 9 3,3559.  10 Overapyment If time 7 is more than the total of lines 5 and 8, enter the amount overpaid  11 Enter the amount of line 10 to be: Credited to 2017 estimated tax ▶   10    12 Fort VII-A. Statements Regarding Activities  13 Louring the tax year, did the foundation attempts to influence any national, state, or local legislation or did it participate or intervene in any political campaign?  1a Louring the tax year, did the foundation attempts to influence any national, state, or local legislation or did it participate or intervene in any political campaign?  1a Louring the tax year, did the foundation attempts to influence any national, state, or local legislation or did it participate or intervene in any political campaign?  1a Louring the tax year, did the foundation in different influence any national, state, or local legislation or did it participate or intervene in any political campaign?  1b Life 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  1c Life the answer is "Yes" to 1a or 1b, attach a detailed description of the activities  1c Life the answer is "Yes" to 1a or 1b, attach a detailed description of the activities  1c Life the attach a detailed description of the activities  1c Life the answer is "Yes" to the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ 0.  2 Life the foundation engaged in any activities that have not previously bee			ء ا	1							
d 8 Backup withholding erroneously withhold 7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here ☐ If Form 2220 is attached 9 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here ☐ If Form 2220 is attached 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 SEE STATEMENT 10 ▶ 9 3, 3,559. 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount owerpaid 11 Enter the amount of line 10 to bic, Credited to 2017 estimated tax ▶ 10 12 Form 11				┿							
d Backup withholding erroneously withhold 7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here □ If Form 2220 is attached 8 Enter any penalty for underpayment of estimated tax. Check here □ If Form 2220 is attached 8 Enter any penalty for underpayment of estimated tax. Check here □ If Form 2220 is attached 9 3 3,359. 10 Verapyment. If line? I smore than the total of lines 5 and 8, enter the amount overpaid 11 Enter the amount of line 10 to be; Credited to 2017 estimated tax. ▶   10   11    Part VII-A   Statements Regarding Activities 1 a Louring the six year, did the toundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?  b Did it spend more than \$100 during the year (either directly or indirectly) for political puriposes (see instructions for the definition)?  If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities 1 bid the countedation in connection with the activities 2 bid the foundation file Form 1120-P0L for this year?  d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:  (1) On the foundation. ▶ \$ 0 . (2) On foundation managers. ▶ \$ 0 .  2 that the foundation engaged in any activities that have not previously been reported to the IRS?  If "Yes," attach a detailed description of the activities 3 has the foundation may unrelated business gross income of \$1,000 or more during the year?  4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?  4b If "Yes," has fit field a tax return on Form 990-T for this year?  5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?  5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?  6 Are the requirements of section 506(e) (relating to sections 4941 through 4945) satisfied either:  8 by language an the governing instrument?  9				+							
To foll credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here ☐ If Form 2220 is attached 9 Tax dee. If the total of lines 5 and 8 is more than line 7, enter amount owed SEE STATEMENT 10 ▶ 9 3,3359. 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 Deby payment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Fefter the amount of line 10 to be; Credited by 2017 estimated tax ▶   Refunded ▶ 11  Part VII-A   Statements Regarding Activities 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? 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? 1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)? 1b		, , ,		╁		<del></del>		}			
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached  9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owwed  SEE STATEMENT 10 ▶ 10  10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid  11 Enter the amount of line 10 to be: Credited to 2017 estimated tax ▶ Refunded ▶ 11  Part VII-A Statements Regarding Activities  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?  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?  1b Did it spend more than \$100 during the year (either directly) or indirectly) for political purposes (see instructions for the definition)?  1b 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  1 c Did the foundation file Form 1120-POL for this year?  1 c Did the foundation file Form 1120-POL for this year?  1 c X  1 c X  1 c X  1 c X  1 c X  1 c X  1 c X  1 c X  1 c X  1 c X  1 c X  1 c X  2 c X  1 c X  2 c X  1 c Yes, "attach a detailed description of the activities  2 c X  2 c X  2 c X  2 c X  2 c X  2 c X  2 c X  3 c X  4 c Did the foundation made any changes, not previously been reported to the IRS?  3 c X  4 c Did the foundation have any changes, not previously been reported to the IRS?  4 c Yes, "attach a detailed description of the activities  3 c X  4 c Did the foundation have any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments, of Yes, "attach a conformed copy of the changes  3 c X  4 c Did the foundation have at the activities  4 c X  4 c Yes, "attach the statement required by General Instruction T  4 c Yes, "attach the st			60				_				Λ
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed  10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpald  11 Enter the amount of line 10 to be; Gredited to 2017 estimated tax  12 During the tax year, did the foundation attempt to influence any nationals, state, or local legislation or did it participate or intervene in any political campaign?  12 During the tax year, did the foundation attempt to influence any nationals, state, or local legislation or did it participate or intervene in any political campaign?  13 During the tax year, did the foundation attempt to influence any nationals, state, or local legislation or did it participate or intervene in any political campaign?  14 During the tax year, did the foundation attempt to influence any nationals, state, or local legislation or did it participate or intervene in any political campaign?  15 During the tax year, did the foundation attempt to influence any nationals, state, or local legislation or did it participate or intervene in any political campaign.  16 During the tax year, did the foundation attempt to influence any nationals, state, or local legislation or did it participate or intervene in any political campaign.  16 During the tax year, did the foundation intervene in a full tax or political expenditures (section 4955) imposed during the year:  17 On the foundation.			ahad					<del> </del>			0.0
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	_			אמ	meMexim :	10 -		<u> </u>			
11 Enter the amount of line 10 to be; Credited to 2017 estimated tax ▶ Refunded ▶ 11    Part VII-A   Statements Regarding Activities			. 51	T 7:						<u>, , , , , , , , , , , , , , , , , , , </u>	<u> </u>
Part VII-A   Statements Regarding Activities  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?  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 and copies of any materials published or distributed by the foundation of the activities of the foundation file Form 1120-POL for this year?  d Enter the amount (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ 0.  e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ 0.  2 Has the foundation engaged in any activities that have not previously been reported to the IRS?  If "Yes," attach a detailed description of the activities  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  3 X  4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?  5 Was there a liquidation, termination, dissolution, or substantial contraction during the year?  6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:  8 by language in the governing instrument, or  9 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, or  9 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?		·			l B of	nded		<del>                                     </del>			
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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  8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ NONE  b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation  9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? If "Yes," complete Part XIV  9 X  10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses  10 X		• By state legislation that effectively amends the governing instrument so that no mandator	y direc	tioi	ns that conflict w	th the state	e law	İ			
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10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses 10 X	9					(5) for cale	endar				1
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	<u>10</u>	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedu	<u>ile listing</u>	g th	eir names and addre	esses				<u></u>	

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?  4b X	P	art VII-A   Statements Regarding Activities (continued)			
section 5/2(b)(13)? If Vest, a trach schedule (see instructions)  2 Did the foundation make a distribution to a doning advanced fund over which the foundation or a disqualshed person had advisory privileges?  If Yes, a trach statement (see instructions)  3 Did the foundation comply with the public imspection requirements for its annual returns and examption application?  Websale address   N/A  1 The books are in carrior   BELIGRAYIA MANAGEMENT, LP  Triliphome no. 215-609-3497  Located at > 29.99 ARCH STREET, 13TH FLOOR, PHILADELPHIA, PA  If It Is Section 4947(a)(1) non-termitable triss filling Form 590-97 in flev of form 1491- Check here  and what the amount of fax-exempt interest received accurated furing the year  16. Allary time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank,  Yes No  16. Allary time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank,  Yes No  16. Section 4947(a)(1) increasing the section of the s				Yes	No
12 Did the Coundation make a distribution to a donor advesed fund over which the toundation or a disqualified person had advesory privileges?  17 Yes, "attack statement (see insepection requirements for its annual returns and exemption application?  18 Did the foundation comply with the public insepection requirements for its annual returns and exemption application?  19 Did the foundation comply with the public insepection requirements for its annual returns and exemption application?  19 Did the foundation comply with the public insepection requirements for its annual returns and exemption application?  10 Did the foundation country ► BELIGRAVIA MANACEMENT, LP Telopor, Publication Telephone no. ►215-609-3497  11 The books are in carrior ► BELIGRAVIA MANACEMENT, LP Telopor, Publication Telephone no. ►215-609-3497  12 Section 4947(b)(1) nonexampt charitable trusts thing from 590-79 intellect form 141- Check here  12 and the intellect of the country of	11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of			
If Yes, attach statement (see instructions)  10 dits flooridation comply with the public inspection requirements for its annual returns and exemption applications?  13 X  Website address ▶ N/A  14 The books are in care of ▶ BELGRAVIA. MANAGEMENT, LP  15 Section 4947(a)(1) nonexempt charitation trusts films from 99-97 in less of Form 1041 - Check here  and enter the amount of lax exemptine interest received or accreed during they are  15 Section 4947(a)(1) nonexempt charitation trusts films from 99-97 in less of Form 1041 - Check here  and enter the amount of lax exemptine interest received or accreed during they are  16 Al any time during calendar year 2016, do the foundation have an interest in or a significant or or other authority over a bank,  17 Yes No  18 No  19 Al any time during calendar year 2016, do the foundation have an interest in or a significant or or other authority over a bank,  18 No  19 All any time during calendar year 2016, do the foundation have an interest in or a significant or or other authority over a bank,  19 All any time during calendar year 2016, do the foundation have an interest in or a significant or or other authority. See the instructions for exception and filing requirements for Finch Form 14.18 if Yes, enter the name of the  15 Terms of the single calendar year 2016, do the foundation (afther directly or indirectly):  16 Bangare in the sale or exchange, or issain of property with a disqualified person?  27 Yes X No  28 Brorow money from, land money to, or otherwise extend credit to (or accept it from)  29 Brorow money from, land money to, or otherwise extend credit to (or accept it from)  20 Brorow money from, land money to, or otherwise extended credit to (or accept it from)  20 Brorow money from, land money to, or otherwise extended credit to (or accept it from)  20 Brorow money from, land money to, or otherwise extended credit to (or accept it from)  21 Brorow money from, land money to, or otherwise extended credit to (or accept it from)  22 Brorow money from, land money		·	11		_X_
13 Did the foundation comply with the public respection requirements for its annual returns and exemption application?  Website address ► N/A  14 The books are in care of ► BELIGRAVIA MANAGEMENT, LP  Located at ► 29.29 ARCH STREET, 13TH FILOOR, PHILODELPHIA, PA  2014 1910 10  15 Section 4947(2(1)) more exempt charactable frusts filing from 950-PF in the of form 1041 - Check here and letter the amount of tax-exempt interest received or accrued during the year 16 Alany time during calendary are? 105, did the foundation have an interest in or a segnature or other authority over a bank, securities, or other financial account in a foreign country?  See the instructions for exceptions and fining requirements for FinCEN Form 114. If Yes, "enter the name of the foreign country ►  Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required  File Form 4720 if any them is checked in the "Yes" column, unless an exception applies.  10 Borrous they are did the foundation (letter directly or indirectly):  11 Engage in the sale or exchange, or lessing of property with a disqualified person?  12 Borrous money from, lend money to, or otherwise extend credit to (or accept them from) a disqualified person?  13 Furnish grown is a selection of the expenses of, a disqualified person?  14 Pex compressation to, or pay or remotives the expenses of, a disqualified person?  15 Furnish grown or property to a government filendar (see pay money or property to a government filendar (see pay money or property to a government serve, at the expenses of, a disqualified person?  15 Furnish grown or years of the filendary of the expenses of the see pay on the pay or property to a government serve, at the expenses of the section of a period diet.  16 Furnisher any income or assets to a disqualified person (or make any of either expenses or the section of the pay or property to a government serve, at the expense or pay or property to a government serve, at the condition of a period the termination of government serve, at the expen	12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges?			
Webste address ▶ N/A  In the blooks are made of ▶ BEJGRAVIA MANAGEMENT, LP  Located at ▶ 2929 ARCH STREET, 13TH FLOOR, PHILADELPHIA, PA  2/F-14 ▶ 1910 4  15 Section 4947(a)(1) nonexempt charitable trusts limp forms 990-Fr in list of from 1041 - Check there and enter the amount of tax exempt interest received or accrued during the year and enter the amount of tax exempt interest received or accrued during the year 16. Alkary time during calendary year 2016, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial accounts in a foreign country?  See the instructions for exceptions and fitting requirements for FinCEN Form 114. If Yes, enter the name of the foreign country ▶  Part VII-B   Statements Regarding Activities for Which Form 4720 May Be Required  File Form 4720 I may them is checked in the "Yes" column, unless an exception applies.  1   File Grant 4720 I may them is checked in the "Yes" column, unless an exception applies.  1   File Grant 4720 I may them is checked in the "Yes" column, unless an exception applies.  1   File Grant 4720 I may them is checked in the "Yes" column, unless an exception applies.  1   File Grant 4720 I may them is checked in the "Yes" column, unless an exception applies.  1   File Grant 4720 I may them is checked in the "Yes" column, unless an exception applies.  1   File Grant 4720 I may them is checked in the "Yes" column, unless an exception applies.  1   File Form 4720 I may them is checked in the grant for the second credit to grant accept it from a disqualited person?  2   Ferror money tron, lend more to a column the person of the second second from the second color of the second second from the second second from the second second from the second from the second from the second from the second second from the second second from the second from					
14 The books are in care of   BELGRAVIA MANAGEMENT. LP   Telephone no.   215 - 609 - 3497	13	·	13		_X_
Located at № 2929 ARCH STREET, 137H FLOOR, PHILADELPHIA, PA    I Section 4947(A) In necessary character treasward or accrued during the year   I section 4947(A)   In necessary character treasward or accrued during the year   At any time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank, so the instructions for exceptions and filing requirements for FinCRN Form 114. If Yes, enter the name of the pregan country		······································			
18 Section 4947(a)(1) nonexempt charable trusts filing Form 990-PF in lieu of Form 1041 - Check here and eiter the anomator of axe-exempt interest received or accrued during the year 164. 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 formation of the completions and filing requirements for FincEN Form 114. If "Yes," enter the name of the formation of the property of the filing of the property of the filing of the property of the filing of the property of the filing of the filing of the property of the filing of the property of the property of the filing of the property of the filing of the property of the property of the filing of the filing of the property of the filing of the filin	14			<u>497</u>	
And enter the amount of tax-exempt interest received or accrized during the year  A lary 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.  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.  1 a During the year did the foundation (either directly or indivectly);  (1) Engage in the sale or exchange, or leasing of property with a disqualified person?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of a disqualified person?  (5) Transfer any income or assets to a disqualified person (or make any of either available for the heinettor use of a disqualified person)?  (6) Agree to pay money or property to a government official for a pend after termination of government service, it terminating within 90 days.  If the foundation agreed to make a girant to or to employ the official for a pend after termination of government service, atterminating within 90 days.  If the foundation agreed to make a girant to or to employ the official for a pend after termination of government service, atterminating within 90 days.  If the foundation agreed to make a girant to or to employ the official for a pend after termination of government service, atterminating within 90 days of the accis fail to qualify under the exceptions described in Regulations section 5444 (1)-3 or in a current notice regarding diseaser assistance close hiere.  2 Taxes on failure to distribute income (section 4942) (dover the exception 4942 (a)) (relating to incorrect valuatio	4.5	· · · · · · · · · · · · · · · · · · ·	104		
18 A lary 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 form 4700 ff any item is checked in the "Yes" column, unless an exception applies.  File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.  1a During the year did the foundation of their directly or indirectly).  15 Engage in the sale or exchange, or lessing of property with a disqualified person?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (5) Furnisher any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?  (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.)  1b If any answer is "Yes" to 14(1)-(6) did any of the sets fall or quality under the exceptions described in Regulations section 53.4941(g)-3 or in a current notice regarding disaster assistance (see instructions)?  1c) Organizations relying on a current notice regarding disaster assistance (see instructions)?  1c) Organizations relying on a current notice regarding disaster assistance (see instructions)?  1c) Organizations relying on a current notice regarding disaster assistance (see instructions)?  1c) Organizations relying on a current notice regarding disaster assistance (see instructions)?  1c) Organizations relying on a current notice regarding disaster assistance (see instructions)?  1c) Organizations relying on a cu	15		3.7	<b>/</b> ⊅	٠ــــا
See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ▶    Part VII-B   Statements Regarding Activities for Which Form 4720 May Be Required	16	· · · · · · · · · · · · · · · · · · ·			No
See the instructions for exceptions and filing requirements for FinCEN Form 114, if "Yes," enter the name of the foreign country."  Part VII-B   Statements Regarding Activities for Which Form 4720 May Be Required  File Form 4720 if any item is checked in the "Yes" column, unless an exception applies. 1 a During the year did the foundation (either directly or indirectly); (1) Engage in the sale or exchange, or leasing of property with a disqualified person?   Yes   X   No   (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)   a disqualified person?   Yes   X   No   (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?   Yes   X   No   (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?   Yes   X   No   (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or make any of either available for the benefit or use of a disqualified person (or pay money or property to a government official? (Exception, Check No")  If the foundation of government service, if terminating within 90 days.)  If any answer is "Yes" to 1a(1)-(6), did 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 as a result of (1) any purchas	10	·	10	162	ŀ
Foreign country   Part VII-B   Statements Regarding Activities for Which Form 4720 May Be Required			16		
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.  1 a During the year did the foundation (either directly or indirectly);  (1) Engage in the sale or exchange, or leasing of property with a disqualified person?  (2) Borrow money from, lean dimoney to, or otherwise extend credit to (or accept it from) a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (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)?  (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 traininating within 90 disys.)  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 53.494 (1(d)-3 or in a current notice regarding disaster assistance cleen instructions)?  Organizations relying on a current notice regarding disaster assistance cleen instructions)?  Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(i)(3) or 4942(i)(5)):  A thite 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 beginning and 2016?  A the 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).  If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.  Fig. 100 (1) (1) (2) (					
File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.  1a During the year dut the foundation (either directly) or indirectly);  (1) Engage in the sale or exchange, or leasing of property with a disqualified person?  (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (5) Transfer any income or assets to a disqualified person)?  (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.)  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(0)-3 or in a current notice regarding disaster assistance (see instructions)?  7) Organizations relying on a current notice regarding disaster assistance (see instructions)?  8) If any answer is "Yes" to 1a(1)-(6), did 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?  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(1) of 4942(1)(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 Is the years Is the years' sundistributed income?" (If applying section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income?" (If applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income?" (If applying the provisions of section 4942(a)(2) (relating to incorrect valuati	Pa				
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(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualited person?  (3) Furnish goods, services, or facilities to (or accept them from) a disqualitied person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (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)?  (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.)  If any answers 'S ''es' to 14(1)-(6), did any of the acts fail to quality 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 (see instructions)?  Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(i)(3) or 4942(i)(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 ''R's, list the years \_  b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer 'No' and attach statement - see instructions).  If ''R's, list the years  b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer 'No' and attach statement - see instructions).  If the provisions of section 4942(a)(2) are being applied to any of the years liste	1a				,
a disqualified person?				<b>'</b> ,	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (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)?  (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.)  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 53.491(1)-30 in a current notice regarding disaster assistance (see instructions)?  Organizations relying on a current notice regarding disaster assistance check here  o 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?  1a 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 Isled 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.)  of If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.  A b If the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?  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 36, 1969; (2) the lapse of the 6-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or be					
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  (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)?  (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.)  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(fg)-3 or in a current notice regarding disaster assistance (see instructions)?  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?  1c		a disqualified person?			
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statement - see instructions.)  c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.	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			-
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.					
Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?    Yes   X   No			2b		\
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4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?  4a X  b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2016?  4b X			96		
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had not been removed from jeopardy before the first day of the tax year beginning in 2016?  4b X			74	<del> </del>	A
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Form 990-PF (2016) THE LUBERT AMILY FOUNDAT	TION, INC.		<u>6-063900</u>	2 Page <b>6</b>
Part VII-B   Statements Regarding Activities for Which Fe	orm 4720 May Be R	equired (continu	ed)	
5a During the year did the foundation pay or incur any amount to:				
(1) Carry on propaganda, or otherwise attempt to influence legislation (section	4945(e))?	Yes	X No	
(2) Influence the outcome of any specific public election (see section 4955); or	to carry on, directly or indire	ctly,		
any voter registration drive?			X No	
(3) Provide a grant to an individual for travel, study, or other similar purposes?		Yes	X No	
(4) Provide a grant to an organization other than a charitable, etc., organization				
4945(d)(4)(A)? (see instructions)		Yes	x No	
(5) Provide for any purpose other than religious, charitable, scientific, literary, of	or educational purposes, or fo	or		
the prevention of cruelty to children or animals?		Yes	X No	
<b>b</b> If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under	er the exceptions described i	n Regulations		
section 53.4945 or in a current notice regarding disaster assistance (see instruc		-	N/A 51	,
Organizations relying on a current notice regarding disaster assistance check he			▶ □ □	
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from		ned		
expenditure responsibility for the grant?		/A Ye:	s 🗆 No	
If "Yes," attach the statement required by Regulations section 53.4945		,		
, , ,			İ	
<b>6a</b> Did the foundation, during the year, receive any funds, directly or indirectly, to p	ay premiums on		s X No	
a personal benefit contract?	record hanafit contract?	TC:	6	b X
<b>b</b> Did the foundation, during the year, pay premiums, directly or indirectly, on a per	ersonal benefit contract?			
If "Yes" to 6b, file Form 8870	It - u tuan aa atuan O		s X No	
7a At any time during the tax year, was the foundation a party to a prohibited tax sl		1e	N/A 7	
b If "Yes," did the foundation receive any proceeds or have any net income attributed Part VIII Information About Officers, Directors, Truste	table to the transaction?	nagara Highly		<u> </u>
Part VIII Information About Officers, Directors, Truster Paid Employees, and Contractors	es, roundation ivia	magers, rngmy	,	
1 List all officers, directors, trustees, foundation managers and their	compensation.			
	(b) Title, and average hours per week devoted	(c) Compensation	(d) Contributions to employee benefit plans and deferred	(e) Expense account, other
(a) Name and address	hours per week devoted to position	(If not paid, enter -0-)	and deferred compensation	account, other allowances
IRA M. LUBERT	PRESIDENT			
THE CIRA CENTRE, 2929 ARCH STREET, 13				
PHILADELPHIA, PA 19104	1.00	0.	0.	0.
	VICE-PRESIDEN	T		
THE CIRA CENTRE, 2929 ARCH STREET, 13				
PHILADELPHIA, PA 19104	1.00	0.	0.	0.
TRICIA BILLINGS	SECRETARY			
THE CIRA CENTRE, 2929 ARCH STREET, 13				
PHILADELPHIA, PA 19104	1.00	0.	0.	0.
	TREASURER			
	IKEADOKHK			
	2.50	0.	0.	0.
PHILADELPHIA, PA 19104  2 Compensation of five highest-paid employees (other than those inc			0_•1	
2 Compensation of the highest-paid employees (other than those me	(b) Title, and average	10110111011	(d) Contributions to	(e) Expense
(a) Name and address of each employee paid more than \$50,000	hours per week	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	account, other allowances
	devoted to position		compensation	anowances
NONE				
		<del></del>		
	1			
Table to produce of other ample sees and over \$50,000				0
Total number of other employees paid over \$50,000			Form	990-PF (2016)

Form 990-PF (2016) THE LUBERT FAMILY FOUNDATION, IN Part VIII Information About Officers, Directors, Trustees, Founda Paid Employees, and Contractors (continued)		539002 Page 7
3 Five highest-paid independent contractors for professional services. If none, enter	r "NONE."	
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
		į
	-	
	<u> </u>	
Total number of others receiving over \$50,000 for professional services  Part IX-A Summary of Direct Charitable Activities		<u>▶</u> 0
List the foundation's four largest direct charitable activities during the tax year. Include relevant statis	stical information such as the	Expenses
number of organizations and other beneficiaries served, conferences convened, research papers pro	duced, etc.	
1 N/A		
2		
3		
4		
Don't IV D		
Part IX-B   Summary of Program-Related Investments  Describe the two largest program-related investments made by the foundation during the tax year or	ulines 1 and 2.	Amount
1 N/A		
0		
2		
		<del></del>
All other program-related investments. See instructions.		
3		
Total. Add lines 1 through 3	_ >	0.
		Form <b>990-PF</b> (2016)

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions) 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 6,708,414. 1a 32,063. b Average of monthly cash balances 16 c Fair market value of all other assets 10 6,740,477. d Total (add lines 1a, b, and c) 1đ e Reduction claimed for blockage or other factors reported on lines 1a and 0. 1c (attach detailed explanation) 1e Acquisition indebtedness applicable to line 1 assets 3 Subtract line 2 from line 1d Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions) 101,107. 6,639,370. Net value of noncharitable-use assets. Subtract line 4 from line 3, Enter here and on Part V, line 4 5 331,969. Minimum investment return Enter 5% of line 5 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.) 331,969. Minimum investment return from Part X, line 6 3,277 Tax on investment income for 2016 from Part VI, line 5 7,238. b Income tax for 2016. (This does not include the tax from Part VI.) 10,515. c Add lines 2a and 2b 3 Distributable amount before adjustments. Subtract line 2c from line 1 3 321,454. Recoveries of amounts treated as qualifying distributions 4 454. Add lines 3 and 4 5 Deduction from distributable amount (see instructions) 6 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 Part XII Qualifying Distributions (see instructions) Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes: 369,955. a Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26 1b b Program-related investments - total from Part IX-B Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes 2 Amounts set aside for specific charitable projects that satisfy the: a Suitability test (prior IRS approval required) 3b **b** Cash distribution test (attach the required schedule) 369,955. Qualifying distributions Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4 4 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment 3,277. income, Enter 1% of Part I, line 27b 6 366,678. Adjusted qualifying distributions. Subtract line 5 from line 4 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

Form **990-PF** (2016)

4940(e) reduction of tax in those years.

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

		(a) Corpus	(b) Years prior to 2015	(c) 2015	<b>(d)</b> 2016
1	Distributable amount for 2016 from Part XI, line 7				321,454.
2	Undistributed income, if any, as of the end of 2016				
	Enter amount for 2015 only			13,519.	
b	Total for prior years:		0		
3	Excess distributions carryover, if any, to 2016:		0.		
	From 2011				
b	From 2012				
C	From 2013				
d	From 2014				
е	From 2015				
f	Total of lines 3a through e	0.			
4	Qualifying distributions for 2016 from				
	Part XII, line 4: ►\$ 369,955.		, ,		
	Applied to 2015, but not more than line 2a			13,519.	
	Applied to undistributed income of prior		_		
	years (Election required - see instructions)		0.		
C	Treated as distributions out of corpus	_			
	(Election required - see instructions)	0.			204 454
	Applied to 2016 distributable amount	24 222			321,454.
	Remaining amount distributed out of corpus	34,982.			
5	Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6	Enter the net total of each column as indicated below:				
a	Corpus Add lines 3f, 4c, and 4e Subtract line 5	34,982.			
b	Prior years' undistributed income. Subtract				
	line 4b from line 2b		0.		
C	Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d	Subtract line 6c from line 6b. Taxable				
	amount - see instructions		0.		
е	Undistributed income for 2015. Subtract line				
	4a from line 2a. Taxable amount - see instr.			0.	
f	Undistributed income for 2016. Subtract				
	lines 4d and 5 from line 1. This amount must				
	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)	0.			
8	Excess distributions carryover from 2011				
	not applied on line 5 or line 7	0.		_ · · · · · -	
9	Excess distributions carryover to 2017.				
	Subtract lines 7 and 8 from line 6a	34,982.			
	Analysis of line 9:				
	Excess from 2012				
	Excess from 2013				
	Excess from 2014				
	Excess from 2015				
<u>e</u>	Excess from 2016 34,982.			<u> </u>	

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Form **990-PF** (2016)

Form 990-PF (2016) THE LUB	ERT FAMILY	FOUNDATION,	INC.	66-06	39002 Page 10
Part XIV Private Operating F			A, question 9)	N/A	
1 a If the foundation has received a ruling of			ł		
foundation, and the ruling is effective for			▶ └┌─┐		
<b>b</b> Check box to indicate whether the found		g foundation described in		4942(j)(3) or 49	12(j)(5)
2 a Enter the lesser of the adjusted net	Tax year	(1) 0045	Prior 3 years	1	( <b>) T</b> ( )
income from Part I or the minimum	(a) 2016	(b) 2015	(c) 2014	(d) 2013	(e) Total
investment return from Part X for					
each year listed				<u> </u>	
<b>b</b> 85% of line 2a				<u> </u>	
c Qualifying distributions from Part XII,					
line 4 for each year listed					
d Amounts included in line 2c not					
used directly for active conduct of					
exempt activities					
<ul> <li>Qualifying distributions made directly</li> </ul>					
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:	İ				
(1) Value of all assets					
(2) Value of assets qualifying					
under section 4942(j)(3)(B)(i)		_			
<b>b</b> "Endowment" alternative test - enter					
2/3 of minimum investment return shown in Part X, line 6 for each year	}		li .	Ì	
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					<del></del>
and 5 or more exempt		1			
organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from				<del> </del>	<del></del>
an exempt organization				<del> </del>	
(4) Gross investment income  Part XV Supplementary Info	rmation (Comple	te this part only	if the foundation	had \$5,000 or mo	re in assets
at any time during t			ii the louridation	ι παα φο,σοσ σι πια	ne in assets
——————————————————————————————————————		401.01.01,			
1 Information Regarding Foundation	=	than 99/ of the total cont	ributions reasoned by the	foundation hafara the alar	o of any tay
a List any managers of the foundation wh year (but only if they have contributed n			ibulions received by the	Houndation before the clos	be or any lax
IRA M. LUBERT	110.0 1110.11 40,000/1 (000 0	5511511 551 (4)(2)11			
	a pura 100/ as mara of th	a stack of a corporation /	or an aqually large party	on of the ownership of a pr	ortnarohin or
b List any managers of the foundation wh other entity) of which the foundation has			or an equally large porti	on of the ownership of a pa	in the ship of
• ,	o a vovo o grando micro.				
NONE					<del></del>
2 Information Regarding Contributi				t t 1 t - d - c - c	note for friends. If
Check here <b>X</b> if the foundation of the foundation makes gifts, grants, etc.					
<del></del>	` <del></del>				
a The name, address, and telephone num	DEL OF E-MAIL ADDRESS OF I	ne person to whom appli	cations should be addre	55tu.	
h The form in which applications about di	a cub multad and rafarma	tunn and materials that al	and maked as		
<b>b</b> The form in which applications should b	e submitted and informa	uon and materials they sf	ioula include:		
c Any submission deadlines:				<del></del>	
o my saomission acadimes.					
d Any restrictions or limitations on awards	s. such as by geographic	al areas, charitable fields	kinds of institutions, or	other factors:	
,	-, -22 25 07 goograpino				
623601 11-23-16					Form <b>990-PF</b> (2016)

Part XV Supplementary Information (continued) 3 Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, Recipient Purpose of grant or contribution Foundation show any relationship to Amount status of any foundation manager Name and address (home or business) recipient or substantial contributor a Paid during the year 2XTREME SUPPORT FOR CHILDREN N/A 501(C)(3) 8101 S SHAFFER PKWY, SUITE 102 WITH SOCIAL & LITTLETON, CO 80127 5,000. EMOTIONAL ISSUES ACADEMY IN MANAYUNK N/A 501(C)(3) EDUCATIONAL SUPPORT 1200 RIVER ROAD FOR CHILDREN WITH CONSHOHOCKEN, PA 19428 DISABILTIES 25,000. ALZHEIMERS ASSOCIATES N/A 501(C)(3) ALZHEIMERS RESEARCH 399 MARKET STREET PHILADELPHIA, PA 19102 1.000. ANTI DEFAMATION LEAGUE N/A 501(C)(3) FIGHT DEFAMATION OF 605 THIRD AVE JEWISH PEOPLE NEW YORK, NY 10158 1,000, BEAT THE STREETS PHILADELPHIA N/A 501(C)(3) SUPPORT YOUTH 3700 MARKET STREET, SUITE 300 WRESTLING 2.500. PHILADELPHIA PA 19104 SEE CONTINUATION SHEET(S) **▶** 3a 369 955. Total b Approved for future payment NONE **▶** 3b Total

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

Enter gross amounts unless otherwise indicated.	Unrelated b	usiness income		by section 512, 513, or 514	(e)
	(a)	(b)	(c) Exclu-	(d)	Related or exempt
1 Program service revenue:	Business Code	Amount	sion	Amount	function income
a	3000				
b	_		++		
c			<del>-   -   -</del>		
d					<del></del>
e					<del></del>
f	-				
g Fees and contracts from government agencies					<del></del>
2 Membership dues and assessments					
3 Interest on savings and temporary cash		<del></del>			
investments			14	54,877.	
4 Dividends and interest from securities			14	65.549.	
5 Net rental income or (loss) from real estate:	` `	· ·			` .
a Debt-financed property					
b Not debt-financed property			16	3,955.	
6 Net rental income or (loss) from personal					
property					
7 Other investment income			14	97,103.	
8 Gain or (loss) from sales of assets other					
than inventory			18	225,125.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a	į l				
b					
С					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)			5.	446,609.	0.
13 Total. Add line 12, columns (b), (d), and (e)			· <del>_ · · · · · · · · · · · · · · · · · · </del>	13	
(See worksheet in line 13 instructions to verify calculations.	)			-	, <u>, , , , , , , , , , , , , , , , , , </u>

#### 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).

Form **990-PF** (2016)

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations Form 990-PF (2016)
Part XVII Ir

	organization directly or indire					ion 501(c) of		Yes	No
	de (other than section 501(c)				ızatıons?				l
<b>a</b> Transfe	ers from the reporting founda	ition to a noncharitat	ole exempt org	ganization of:					
(1) Ca			t				1a(1)		_X_
( <b>2</b> ) Ot	her assets						1a(2)		X
<b>b</b> Other t	ransactions:						1		
(1) Sa	lles of assets to a noncharitat	ole exempt organizat	ion				1b(1)		X
( <b>2</b> ) Pu	irchases of assets from a non	ncharitable exempt o	rganization				1b(2)		X
(3) Re	intal of facilities, equipment, o	or other assets					1b(3)		X
(4) Re	imbursement arrangements						1b(4)		_X_
( <b>5</b> ) Lo	ans or loan guarantees						1b(5)		X
(6) Pe	rformance of services or mei	mbership or fundrais	sing solicitatio	ns			1b(6)		X
c Sharin	g of facilities, equipment, mai	iling lists, other asse	ts, or paid em	ployees			1c		X
<b>d</b> If the a	nswer to any of the above is '	"Yes," complete the f	ollowing sche	dule. Column (b) should alv	vays show the fair i	market value of the goods, o	ther ass	sets,	
or serv	ices given by the reporting fo	oundation. If the four	dation receive	ed less than fair market valu	ie in any transaction	n or sharing arrangement, s	now in		
columi	(d) the value of the goods, o	other assets, or serv	ces received.						
a) Line no	(b) Amount involved	(c) Name of	noncharitable	exempt organization	(d) Descriptio	n of transfers, transactions, and	sharing ar	rangeme	ents
			N/A						
						<del> </del>			
		<del></del>		·		<del>,</del>			
	· · · · · · · · · · · · · · · · · · ·								
			<del></del>						
					<del> </del>				
				<del></del>	<del></del>				
	<del></del>								
					<del>-  </del>				
2a Is the f	oundation directly or indirect	ly affiliated with, or r	elated to, one	or more tax-exempt organi	zations described				
ın secti	on 501(c) of the Code (other	than section 501(c)	(3)) or in sect	ion 527?			Yes	X	☐ No
b If "Yes,	complete the following sche	edule.							
	(a) Name of orga	anization		(b) Type of organization		(c) Description of relations	nıp		
	N/A								
		<del></del>	· <u> </u>						
-						<del></del>			
	<del>//</del>	· · · · · · · · · · · · · · · · · · ·							
Un	der penaltes of perjury, I declare t	that I have examined this	s return, includir	ng accompanying schedules and	statements, and to the	e best of my knowledge			
				n taxpayer) is based on all inform		L Ma	y the IRS irn with th		
Here				11/12/17	Paso		wn below	/ (see ins	str )?
	THIN!			<u>'''                               </u>			Yes	; L_	ا ۱۵۰ ل
3	ignature of a tiber or trustee		T	Date	Title	Ohart Carlo			
	Print/Type preparer's na	ıme	Preparer's s	ionature	Date	Check if PTIN			
D - 1 - 1			M	V	11/1347	self- employed			
Paid	ROBERT I.				(1)/(/		<u> 1338</u>		<u>:</u>
Prepare		GRAVIA MA	NAGEME	NT, LP		Firm's EIN ► 20-3	8633	31	
Use On	У								
	Firm's address ► 29	29 ARCH S	TREET.	13TH FLOOR					
		ILADELPHI				Phone no. 215-6	09-3	497	!
							orm <b>99</b>		
									. ,

Capital Gallis alid Lus	ses for rax on investment income			
(a) List and 2-story bri	describe the kind(s) of property sold ick warehouse; or common stock, 20	, e.g., real estate, 0 shs. MLC Co.	(b) How acquire P - Purchase D - Donation	(c) Date acquired (d) Date sold (mo., day, yr.)
1a SCHWAB - ST - S	SEE ATT		P	VARIOUS VARIOUS
	SEE ATT		P	VARIOUS VARIOUS
	OLDINGS		P	VARIOUS VARIOUS
	IMENTS - ST		P	VARIOUS VARIOUS
e IL HEDGE INVES			P	VARIOUS VARIOUS VARIOUS VARIOUS
·			P	
IL HEDGE INVEST			P	VARIOUS VARIOUS
	TMENTS - SEC 1256	<u> </u>		VARIOUS VARIOUS
h IL HEDGE RESTR			P	VARIOUS VARIOUS
IL HEDGE RESTR			P	VARIOUS VARIOUS
IL HEDGE RESTR			<u> </u>	VARIOUS VARIOUS
k IL HEDGE RESTR			P	VARIOUS VARIOUS
STONEMOR - SEC			P	VARIOUS VARIOUS
m NATURAL RESOUR			P	VARIOUS VARIOUS
n NATURAL RESOUR		C 1231	P	VARIOUS VARIOUS
o BLACKSTONE - S	Γ		P	VARIOUS VARIOUS
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(e)	<b>h)</b> Gain or (loss) plus (f) minus (g)
a 54,809.		28,677.		26,132.
b 349,697.		454,755.		-105,058.
c 24,950.		30,100.		
d 111,603.		33/133	<del></del>	111,603.
e 223,700.				223,700.
f 5,592.				5,592.
05 060				25,863.
0.00				3,694.
h 3,694.		F2 414		-53,414.
278.		53,414.		
		1 270		
k I 27.		1,270.		$\frac{-1,270\cdot}{27\cdot}$
			<del></del>	5.
		7,288.		
<u>n</u>		1,200.		-1.
Complete only for assets showin	g gain in column (h) and owned by t			osses (from col. (h))
Complete only for assets showing	(j) Adjusted basis		Gains (excess	s of col. (h) gain over col. (k),
(i) F.M.V. as of 12/31/69	as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	but	not less than "-0-")
a				26,132.
<u>b</u>				
С			<del></del>	-5,150.
d				111,603.
е				223,700.
f				5,592.
g				25,863.
h				3,694.
				-53,414.
				278.
le l				-1,270.
<u>K</u>				27.
				5.
2				-7,288.
0				-1.
<u> </u>				
2 Capital gain net income or (net ca	pital loss) { If gain, also enter "-0	in Part I, line 7 -" in Part I, line 7	2	
If gain, also enter in Part I, line 8,		d (6):		
If (loss), enter "-0-" in Part I, line 8	3	J	3	

Port IV		C. 66-063	9 2 1	PAGE	2 OF 2
	osses for Tax on Investment Income		(h) Universal	<del></del>	
(a) List an 2-story b	id describe the kind(s) of property sol prick warehouse; or common stock, 2	d, e.g., real estate, 00 shs. MLC Co.	P - Purchase D - Donation	(c) Date acquired (mo , day, yr.)	(d) Date sold (mo., day, yr.)
1a BLACKSTONE - I	<del></del>		D - Donation P	VARIOUS	VARIOUS
b BLACKSTONE - S			P	VARIOUS	VARIOUS
c TEEKAY - SEC 1			P	VARIOUS	VARIOUS
d ICAHN - ST			P	VARIOUS	VARIOUS
e ICAHN - LT	<del></del>		P	VARIOUS	VARIOUS
ICAHN - SEC 12	231		P	VARIOUS	VARIOUS
g ICAHN - SEC 12		······································	P	VARIOUS	VARIOUS
h				1 2 2 2 2	1
				Ţ	
k					
				<u> </u>	
m					
<u>n</u>					
_0	<del></del>			<u> </u>	<u> </u>
(e) Gross sales price	(f) Depreciation allowed	(g) Cost or other basis	(1)	Gain or (loss)	
	(or allowable)	plus expense of sale	(e)	plus (f) minus (g)	
<u>a</u> 37.		<del></del>			37.
<u>b</u> <u>11</u> .					11.
<u>c</u> 63.	•	160			63.
d e 472.		160.	<del></del>	<del></del>	-160. 472.
e 472.	•	1.	<del></del>		-1.
	<del>                                     </del>	10.		<del></del>	-10.
<u>g</u> h		10.			-10.
1					
k					
Ī			<del></del>		
m					
n					
0					
Complete only for assets show	ing gain in column (h) and owned by	the foundation on 12/31/69	(I) La	sses (from col. (h	))
(i) F.M.V. as of 12/31/69	(j) Adjusted basis	(k) Excess of col. (1)	Gains (excess	of col. (h) gain ov not less than "-0-")	er col. (k),
(1) F.IVI.V. as of 12/31/09	as of 12/31/69	over col. (j), if any		HULIESS HAIT -U- )	
<u>a</u>					37.
<u>b</u>					11.
<u>C</u>					63.
<u>d</u>	<u> </u>		<del>,</del>		-160.
<u>e</u>	<del> </del>	<del>        </del>			472.
1		<del> </del>	<del></del>		$\frac{-1}{10}$
9	<del> </del>	ļ			-10.
<u>h</u>		<del>                                     </del>		<del></del>	
1.	<del></del>	<del> </del>			
<u>k</u>	<del> </del>	<del> </del>			
<u> </u>	<del> </del>	<del>                                     </del>			
<u>m</u>	<del> </del>	<del> </del>			
0	<del> </del>	<del> </del>			
0	<u> </u>				
2 Capital gain net income or (net o	ranital loss) ( If gain, also ente	r in Part I, line 7 0-" in Part I, line 7	2		225,125.
•		_ !			222,142.
3 Net short-term capital gain or (lo If gain, also enter in Part I, line 8	oss) as defined in sections 1222(5) a	nd (6):			
If (loss), enter "-0-" in Part I, line		r I	3	N/A	
(1000), onto: O mir uit i, iiiio	<u> </u>		<u> </u>	41/41	

## FORM 990-PF UNDERPAYMENT OF ESTIMATED TAX WORKSHEET

lame(s)				Identifying Numbe	er
THE LUBERT	FAMILY FOUND	ATION, INC.		66-0639	002
(A) *Date	(B) Amount	(C) Adjusted Balance Due	(D) Number Days Balance Due	(E) Daily Penalty Rate	(F) Penalty
,		-0-	, ,		
05/15/16	685.	685.	31	.000109290	2
06/15/16	685.	1,370.	92	.000109290	14
09/15/16	685.	2,055.	91	.000109290	20
12/15/16	685.	2,740.	16	.000109290	5
12/31/16	0.	2,740.	135	.000109589	41
				-	
			<u>, _</u>		
					<del></del>
				-	
nalty Due (Sum of Colum	nn F).				8

<sup>\*</sup> Date of estimated tax payment, withholding credit date or installment due date.

612511 04-01-16

FORM 990-PF	INTEREST	ON	SAVINGS	AND	TEMPORARY	CASH	INVESTMENTS	STATEMENT	1
			-		(A)		(B)	(C)	

SOURCE	(A) REVENUE PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
BLACKSTONE GROUP	28.	28.	
ICAHN ENTERPRISES	1,042.	1,042.	
IL HEDGE INVESTMENTS, LLC	49,330.	49,330.	
IL HEDGE RESTRICTED PORTFOLIO,			
LLC	3,234.	3,234.	
NATURAL RESOURCE PARTNERS	334.	334.	
STONEMOR PARTNERS	490.	490.	
TARGA RESOURE PARTNERS	29.	29.	
TEEKAY LNG PARTNERS	390.	390.	
TOTAL TO PART I, LINE 3	54,877.	54,877.	
TEEKAY LNG PARTNERS	390.	390.	

FORM 990-PF	DIVIDENDS	AND INTEREST	FROM SECUR	ITIES ST	PATEMENT 2
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
BLACKSTONE GROUP BROKERAGE	6.	0.	6.	6.	
DIVIDENDS	7,956.	0.	7,956.	7,956.	
ICAHN ENTERPRISES IL HEDGE	120.	0.	120.	120.	
INVESTMENTS, LLC IL HEDGE RESTRICTED	54,263.	0.	54,263.	54,263.	
PORTFOLIO, LLC	3,200.	0.	3,200.	3,200.	
STONEMOR PARTNERS	4.	0.	4.	4.	
TO PART I, LINE 4	65,549.	0.	65,549.	65,549.	

FORM 990-PF	RENTAL IN	COME	Water Control	STATEMENT 3
KIND AND LOCATION OF PROPERTY			ACTIVITY NUMBER	GROSS RENTAL INCOME
IL HEDGE INVESTMENTS, LLC IL HEDGE RESTRICTED PORTFOLIC BLACKSTONE GROUP ICAHN ENTERPRISES STONEMOR PARTNERS NATURAL RESOURCE PARTNERS	- ), LLC		1 2 3 4 5 6	430. 431. 2. 116. 272. 2,704.
TOTAL TO FORM 990-PF, PART I,	LINE 5A		=	3,955.
FORM 990-PF	OTHER I	NCOME		STATEMENT 4
DESCRIPTION		(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	
IL HEDGE INVESTMENTS, LLC IL HEDGE RESTRICTED PORTFOLIC BLACKSTONE GROUP ICAHN ENTERPRISES NATURAL RESOURCE PARTNERS STONEMOR PARTNERS TARGA RESOURCE PARTNERS TEEKAY LNG PARTNERS	D, LLC	83,016. 19,546. 26. -914. -634. -1,270. -623. -2,044.	19,546 26 -914 -634 -1,270 -623	• • • • • •
TOTAL TO FORM 990-PF, PART I	, LINE 11	97,103.	97,103	•
FORM 990-PF	XAT	ŒS		STATEMENT 5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOM	
IL HEDGE INVESMTENTS, LLC TEEKAY	1,209.			0
TO FORM 990-PF, PG 1, LN 18	1,213.	1,213	•	0

		4
ton,	INC.	

FORM 990-PF	OTHER E	XPENSES	· · · · · · · · · · · · · · · · · · ·	STATEMENT 6		
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVES MENT INCC				
IL HEDGE INVESTMENTS, LLC - PORTFOLIO DEDUCTIONS IL HEDGE RESTRICTED	92,150.	92,1	.50.	0.		
PORTFOLIO, LLC - PORTFOLIO DEDUCTIONS BLACKSTONE - PORTFOLIO	5,459.	5,4	159.	0.		
DEDUCTIONS	1.		1.	0.		
TO FORM 990-PF, PG 1, LN 23	97,610.	97,6	510.	0.		
FORM 990-PF	CORPORAT	E STOCK		STATEMENT 7		
DESCRIPTION			BOOK VALUE	FAIR MARKET VALUE		
MARKETABLE SECURITIES		~	147,722.	147,722.		
TOTAL TO FORM 990-PF, PART II	, LINE 10B	=	147,722.	147,722.		
FORM 990-PF	OTHER INV	ESTMENTS		STATEMENT 8		
DESCRIPTION		LUATION ETHOD	BOOK VALUE	FAIR MARKET VALUE		
IL HEDGE INVESTMENTS, LLC IL HEDGE RESTRICTED PORTFOLIC		FMV FMV	6,447,871. 195,628.			
		_	<del></del>			

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FORM 990-PF		OTHER ASSETS		STAT	EMENT	9
DESCRIPTION		BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE		MARKE' ALUE	r
ORGANIZATIONAL COS	TS	2,276.	2,276.	<del></del>	2,2	76.
TO FORM 990-PF, PA	RT II, LINE 15	2,276.	2,276.		2,2	76.
FORM 990-PF	INTEREST	r AND PENALTIES		STAT	EMENT	10
TAX DUE FROM FORM UNDERPAYMENT PE LATE PAYMENT IN LATE PAYMENT PE	NALTY ITEREST	[				77. 82. 67. 98.
TOTAL AMOUNT DUE					3,5	24.
FORM 990-PF	LATI	E PAYMENT PENALT	ΥΥ	STAT	EMENT	11
DESCRIPTION	DATE	AMOUNT	BALANCE M	ONTHS	PENAL	TY
TAX DUE DATE FILED	05/15/1 11/15/1		3,277. 3,277.	6	<del></del>	98.
						98.
TOTAL LATE PAYMENT	PENALTY					<del></del>
	<del></del>	E PAYMENT INTER	EST	STAT	EMENT	12
FORM 990-PF	<del></del>		EST LANCE RATE	STAT	'EMENT INTER	
TOTAL LATE PAYMENT FORM 990-PF  DESCRIPTION TAX DUE DATE FILED	LAT			DAYS		

Part XV Supplementary Information			N 00-003.	
3 Grants and Contributions Paid During the Y	<del></del>			
Recipient	If recipient is an individual, show any relationship to any foundation manager	Foundation status of	Purpose of grant or contribution	Amount
Name and address (home or business)	or substantial contributor	recipient		
BOYS AND GIRLS CLUB OF PHILADELPHIA	N/A	501(C)(3)	SUPPORT YOUTH PROGRAMS	
1518 WALNUT STREET, SUITE 605 PHILADELPHIA, PA 19102				<u> 15,000,</u>
CARE USA PO BOX 7039	N/A	501(C)(3)	HELP WOMEN AND CHILDREN IN NEED	
MARRIFIELD, VA 22116			CHILDREN IN NEED	20,000.
CHARITY: WATER		501(C)(3)	SUPPORT CLEAN WATER	
40 WORTH STREET	N/A	501(0)(3)	PROJECTS	
NEW YORK, NY 10013				15,000,
CHOP FOUNDATION	N/A	501(C)(3)	HELP HOSPITAL WITH	
100 PENN SQUARE EAST, 8TH FL, ST 8050 PHILADELPHIA, PA 19104			RESEARCH, TEACHING & CLINICAL PRIORITIES	4,772.
CITYTEAM PO BOX 8580	N/A	501(C)(3)	HOMELESS OUTREACH	
PHILADELPHIA, PA 19101				1,000,
CUREDUCHENNE	N/A	501(C)(3)	PROVIDE HELP TO YOUNG	
1400 QUAIL STREET, SUITE 110 NEWPORT BEACH, CA 92660		301(0)(3)	BOYS AFFECTED BY	500.
NEWFORT BEACH, CA 92000			MUSCULAR DISEASE	
DOCTORS WITHOUT BORDERS	N/A	501(C)(3)	MEDICAL	
333 SEVENTH AVENUE NEW YORK, NY 10010				15,000.
EPILEPSY FOUNDATION EASTERN PA 50 BELMONT AVE, APT. 204	N/A	501(C)(3)	EPILEPSY RESEARCH	
BALA CYNWYD, PA 19004				500.
FRANKLIN INSTITUTE	N/A	501(C)(3)	SUPPORT MUSEUM	
222 NORTH 20TH STREET PHILADELPHIA PA 19103				15,000.
THIUNDENFILM, FM 19103				13,000.
FREIRE CHARTER SCHOOL	N/A	501(C)(3)	SUPPORT CHARTER SCHOOL	
2027 CHESTNUT STREET PHILADELPHIA PA 19103				8,333,
Total from continuation sheets			<u></u>	335,455

66-0639002

Part XV Supplementary Information				
3 Grants and Contributions Paid During the	Year (Continuation)			
Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager	Foundation status of	Purpose of grant or contribution	Amount
Name and address (nome of business)	or substantial contributor	recipient		
FRIENDS OF THE AVALON VOLUNTEER FIRE DEPARTMENT PO BOX 361	N/A	501(C)(3)	VOLUNTEER FIRE DEPT SUPPORT	
AVALON, NJ 08202		<del> </del>		50,
GLADWYNE MONTESSORI	N/A	501(C)(3)	EDUCATION	
920 YOUNGSFORD ROAD				
GLADWYNE, PA 19035		<del> </del>		6,000.
HELP US ADOPT	N/A	501(C)(3)	ADOPTION SUPPORT	
PO BOX 787				
NEW YORK, NY 10150		ļ		1,500,
HOPE COMMUNITY CHURCH	N/A	501(C)(3)	SUPPORT LOCAL CHURCH	
235 W MAIN STREET			INITIATIVES	10 000
MOORESTOWN, NJ 08057		<del> </del>		10,000.
JEFFERSON UNIVERSITY	N/A	501(C)(3)	MEDICAL/EDUCATION	
125 SOUTH NINTH ST., SUITE 600 PHILADELPHIA PA 19107				10,000.
JEWISH FEDERATION	N/A	501(C)(3)	SUPPORT JEWISH	
2100 ARCH STREET	17 A	501(0)(3)	COMMUNITY	
PHILADELPHIA, PA 19103				10,000.
KENDALL'S CRUSADE	N/A	501(C)(3)	AVM RESEARCH	
331 WINSTON WAY				
BERWYN, PA 19312				1,000.
LASALLE ADADEMY	N/A	501(C)(3)	EDUCATING CHILDREN IN GRADES 3 THROUGH 8	
L434 N. 2ND STREET PHILADELPHIA, PA 19122			WHO'S LIVES ARE	
			LIMITED BY	
			SOCIOECONOMIC FACTORS	20,000.
LITERACY AND LIFE	N/A	501(C)(3)	SUPPORT FOR FAMILY	
55 PIMROSE CIRCLE			EDUCATION IN JAMAICA	
PRINCETON, NJ 08540	<del></del>			5,000.
MAKE A WISH FOUNDATION	N/A	501(C)(3)	PROVIDE TERMINALLY ILL	
ONE VALLEY SQUARE, 512 TWP LINE RD,			CHILDREN A WISH	
SUITE 133 BLUE BELL PA 19422				5,000.
Total from continuation sheets	<del></del>			

Part XV Supplementary Information						
3 Grants and Contributions Paid During the						
Recipient  Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager	Foundation status of	Purpose of grant or contribution	Amount		
Maine and address (nome or business)	any foundation manager or substantial contributor	recipient				
MARINE CORPS SCHOLARSHIP FOUNDATION	N/A	501(C)(3)	MARINE CORPS			
909 N. WASHINGTON STREET			SCHOLARSHIPS	,		
ALEXANDRIA, VA 22314				1,000,		
MIGRANT FARMWORKERS ASSISTANCE FUND PO BOX 413223	N/A	501(C)(3)	FARMWORKERS SUPPORT			
KANSAS CITY MO 64141		1				
MINDING YOUR MIND	N/A	501(C)(3)	MENTAL ILLNESS			
42 W. LANCASTER AVE	N/ A	501(6/(3/	RESEARCH			
ARDMORE, PA 19003	<del> </del>	<del> </del>		2,500.		
		İ				
MISSION 22	N/A	501(C)(3)	PTSD SUPPORT			
PO BOX 1511						
NASHVILLE, IN 47448		<del> </del>	+	1,000.		
•						
MONTGOMERY CHILD ADVOCACY PROJECT	N/A	501(C)(3)	SUPPORT TROUBLED YOUTH			
109 CHERRY STREET				5,000,		
NORRISTOWN, PA 19401				3,000,		
JARTONAL ODANOD	L.,	F01/G1/21	CHEROLE BURN AVERTOR			
NATIONAL GRANGE L616 H ST NW	N/A	501(C)(3)	SUPPORT RURAL AMERICA			
NASHINGTON, DC 20006				1,000,		
NEW BRITAIN INDUSTRIAL MUSEUM	N/A	501(C)(3)	SUPPORT MUSEUM			
85 MAIN STREET						
NEW BRITAIN, CT 06051	<del></del>			5,000		
	,					
PAN MASSACHUSETTS CHALLENGE	N/A	501(C)(3)	CANCER RESEARCH			
77 4TH AVE				500.		
EEDHAM, MA 02494				500.		
PENN STATE UNIVERSITY ONE OLD MAIN	N/A	501(C)(3)	EDUCATION			
INIVERSITY PARK, PA 16802				500.		
PENNSYLVANIA INNOCENCE PROJECT	N/A	501(C)(3)	SUPPORT INMATES			
515 MARKET STREET	PV 6	501(0)(3)	IMPROPERLY CONVICTED			
PHILADELPHIA, PA 19102	<u> </u>		OF CRIMES	1,000		
Total from continuation sheets				<del> </del>		

Part XV Supplementary Information				
3 Grants and Contributions Paid During the Y	f recipient is an individual.	<u></u>		
Name and address (home or business)	show any relationship to any foundation manager	Foundation status of	Purpose of grant or contribution	Amount
,	or substantial contributor	recipient		
PERKINS CENTER FOR THE ARTS	N/A	501(C)(3)	ARTISTIC AND CULTURAL SERVICES	
MOORESTOWN NJ 08057			DERVICES .	1,000
PETERS PLACE	N/A	501(C)(3)	SUPPORT FOR GRIEVING	
150 N. RADNOR-CHESTER ROAD, SUITE F RADNOR, PA 19087			CHILDREN	5,000
PHILADELPHIA CONVENTION & VISITORS BUREAU FOUNDATION	N/A	501(C)(3)	PHILADELPHIA TOURISM SUPPORT	
1601 MARKET STREET, SUITE 200 PHILADELPHIA, PA 19103				50,000
PHILADELPHIA ZOO 3400 WEST GIRARD AVE	N/A	501(C)(3)	SUPPORT THE ZOO	
PHILADELPHIA, PA 19104	1			250
PHILLY YOUTH BASKETBALL 1735 MARKET STREET PHILADELPHIA, PA 19103	N/A	501(C)(3)	SUPPORT YOUTH BASKETBALL	500
PSAA PHILADELPHIA CHAPTER PO BOX 22402 PHILADELPHIA, PA 19110	N/A	501(C)(3)	SUPPORT THE LIBERTY BALL	750
PSI 1120 19TH STREET, NW WASHINGTON, DC 20036	N/A	501(C)(3)	SUPPORT BASIC HEALTHCARE	20,000
RADNOR CONSERVANCY PO BOX 48 WAYNE, PA 19087	N/A	501(C)(3)	SUPPORT CONSERVANCY	1,000
ST. JUDE'S 501 ST. JUDE PLACE MEMPHIS, TN 38105	n/A	501(C)(3)	FIGHT CANCER IN CHILDREN	1,000
STRAWBERRY FIELDS 3054 ENTERPRISE DRIVE STATE COLLEGE, PA 16801	N/A	501(C)(3)	HELP ADULTS WITH DEVELOPMENT DISABILITY	2,000

Part XV Supplementary Information

3 Grants and Contributions Paid During the				
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
SUSAN G. KOMEN PHILADELPHIA	N/A	501(C)(3)	BREAST CANCER RESEARCH	-
125 SOUTH NINTH ST., SUITE 202 PHILADELPHIA, PA 19107				1,000
THE CHILDRENS HOSPITAL OF PHILADELPHIA 34TH STREET AND CIVIC CENTER BLVD PHILADELPHIA, PA 19104	N/A	501(C)(3)	HOSPITAL SUPPORT	25,500
THE COOPER FOUNDATION 200 FEDERAL STREET, SUITE 146 CAMDEN, NJ 08103	N/A	501(C)(3)	BENEFIT FOR COOPER TRAUMA CENTER	12,500
THE FRIENDSHIP CIRCLE 754 SOUTH 9TH STREET PHILADELPHIA, PA 19147	N/A	501(C)(3)	HELP CHILDREN WITH SPECIAL NEEDS	2,300
THE SCHOOL FOR CHILDREN WITH HIDDEN INTELLIGENCE 1800 JFK BLVD PHILADELPHIA, PA 19103	N/A	501(C)(3)	EDUCATION	15,000
THE TREVOR PROJECT PO BOX 69232 WEST HOLLYWOOD, CA 90069	N/A	501(C)(3)	YOUTH CRISIS AND SUICIDE SUPPORT	10,000
TRUSTEES OF THE UNIVERSITY OF	N/A	501(C)(3)	EDUCATION SUPPORT	
3451 WALNUT STREET PHILADELPHIA, PA 19104				1,000
WOMEN OF TOMORROW PO BOX 36755	N/A	501(C)(3)	SUPPORT WOMENS ISSUES	
PHILADELPHIA, PA 19107				500
Total from continuation sheets				