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Form 990-PF

Department of the Treasury
Internal Revenue ServiceRETURNED TO NOVEMBER 15, 2017
Return of Private Foundation

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

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Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2016

Open to Public Inspection

For calendar year 2016 or tax year beginning , and ending

Name of foundation

THE STANLEY AND ROBERTA BOGEN CHARITABLE
FOUNDATION,

Number and street (or P O box number if mail is not delivered to street address)

1345 SIXTH AVE.- 39TH FLOOR

City or town, state or province, country, and ZIP or foreign postal code

NEW YORK, NY 10105

G Check all that apply:

☐ Initial return☐ Initial return of a former public charity☐ Final return☐ Amended return☐ Address change☐ Name change

H Check type of organization:

☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust☐ Other taxable private foundationI Fair market value of all assets at end of year
(from Part II, col (c), line 16)

\$ 3,244,976.

J Accounting method: ☒ Cash ☐ Accrual
☐ Other (specify)

(Part I, column (d) must be on cash basis)

Part I

Analysis of Revenue and Expenses

(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))

(a) Revenue and
expenses per books(b) Net investment
income(c) Adjusted net
income(d) Disbursements
for charitable purposes
(cash basis only)

1 Contributions, gifts, grants, etc., received

1,109,066.

N/A

2 Check ☐ if the foundation is not required to attach Sch B3 Interest on savings and temporary
cash investments

4 Dividends and interest from securities

64,543.

64,543.

STATEMENT 1

5a Gross rents

b Net rental income or (loss)

6a Net gain or (loss) from sale of assets not on line 10

175,476.

b Gross sales price for all
assets on line 6a 1,045,440.

7 Capital gain net income (from Part IV, line 2)

175,476.

8 Net short-term capital gain

9 Income modifications

10a Gross sales less returns
and allowances

b Less Cost of goods sold

c Gross profit or (loss)

11 Other income

12 Total Add lines 1 through 11

1,349,085.

240,019.

13 Compensation of officers, directors, trustees, etc

0.

0.

0.

14 Other employee salaries and wages

15 Pension plans, employee benefits

16a Legal fees

b Accounting fees

STMT 2

2,305.

1,537.

768.

c Other professional fees

17 Interest

18 Taxes

STMT 3

275.

0.

275.

19 Depreciation and depletion

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses

24 Total operating and administrative

expenses Add lines 13 through 23

2,580.

1,537.

1,043.

25 Contributions, gifts, grants paid

738,970.

738,970.

26 Total expenses and disbursements

Add lines 24 and 25

741,550.

1,537.

740,013.

27 Subtract line 26 from line 12

a Excess of revenue over expenses and disbursements

607,535.

b Net investment income (if negative, enter -0-)

238,482.

c Adjusted net income (if negative, enter -0-)

N/A

CLIENT'S COPY

A Employer identification number

94-3457573

B Telephone number

212-756-4482

C If exemption application is pending, check here ☐D 1. Foreign organizations, check here ☐2. Foreign organizations meeting the 85% test,
check here and attach computation ☐E If private foundation status was terminated
under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination
under section 507(b)(1)(B), check here ☐RECEIVED
DEC 07 2017

Operating and Administrative Expenses

RECEIVED

NOV 17 2017

RECEIVED



THE STANLEY AND ROBERTA BOGEN CHARITABLE FOUNDATION

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		
		Beginning of year (a) Book Value	End of year (b) Book Value (c) Fair Market Value	
Assets	1 Cash - non-interest-bearing	38,820.	209,100.	209,100.
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock STMT 4	2,139,605.	2,576,860.	3,035,876.
	c Investments - corporate bonds			
	Liabilities	11 Investments - land, buildings, and equipment basis ▶		
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other				
14 Land, buildings, and equipment basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		2,178,425.	2,785,960.	3,244,976.
17 Accounts payable and accrued expenses				
18 Grants payable				
Net Assets or Fund Balances	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
23 Total liabilities (add lines 17 through 22)	0.	0.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/>			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>			
	27 Capital stock, trust principal, or current funds	0.	0.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	2,178,425.	2,785,960.	
30 Total net assets or fund balances	2,178,425.	2,785,960.		
31 Total liabilities and net assets/fund balances	2,178,425.	2,785,960.		

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	2,178,425.
2 Enter amount from Part I, line 27a	2	607,535.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	2,785,960.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	2,785,960.

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Part IV Capital Gains and Losses for Tax on Investment Income

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e 1,045,440.		869,964.	175,476.

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

(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			
b			
c			
d			
e			175,476.

2 Capital gain net income or (net capital loss)	<div> <div>If gain, also enter in Part I, line 7</div> <div>If (loss), enter -0- in Part I, line 7</div> </div>	2	175,476.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6). If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8		3	N/A

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2015	634,160.	2,561,457.	.247578
2014	711,350.	2,110,727.	.337017
2013	563,254.	1,711,456.	.329108
2012	548,570.	996,870.	.550292
2011	440,701.	862,326.	.511061

2 Total of line 1, column (d)	2	1.975056
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.395011
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	4	642,842.
5 Multiply line 4 by line 3	5	253,930.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	2,385.
7 Add lines 5 and 6	7	256,315.
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.	8	740,013.

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	2,385.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	0.
3 Add lines 1 and 2		3	2,385.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	0.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5	2,385.
6 Credits/Payments.			
a 2016 estimated tax payments and 2015 overpayment credited to 2016	6a		
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments Add lines 6a through 6d	7		0.
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8		42.
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		2,427.
10 Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be Credited to 2017 estimated tax	11		

Part VII-A Statements Regarding Activities

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

N/A

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Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <u>N/A</u>	X	
14 The books are in care of ► <u>TAXPAYER</u> Telephone no. ► <u>914-949-2990</u> Located at ► <u>C/O CITRIN COOPERMAN, 709 WESTCHESTER AVENUE, WHI</u> ZIP+4 ► <u>10604</u>		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	15 N/A	
16 At any time during calendar year 2016, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the foreign country ►	16	X

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly): (1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (6) Agree to pay money or property to a government official? (Exception Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here	1b N/A	
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 X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)): a At the end of tax year 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ►		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions)	2b N/A	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b If "Yes," did it have excess business holdings in 2016 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969; (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest; or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2016)	3b N/A	
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

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FOUNDATION

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

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

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions)

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No

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

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒

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

N/A

☐ Yes ☐ No

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

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

☐ Yes ☒ No

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

6b

X

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

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

☐ Yes ☒ No

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

N/A

7b

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
STANLEY BOGEN 1345 SIXTH AVE NEW YORK, NY 10105	TRUSTEE AS NEEDED 0.00	0.	0.	0.
ROBERTA BOGEN 1345 SIXTH AVE NEW YORK, NY 10105	TRUSTEE AS NEEDED 0.00	0.	0.	0.

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

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

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

0

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

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a Average monthly fair market value of securities	1a	500,000.
b Average of monthly cash balances	1b	152,631.
c Fair market value of all other assets	1c	
d Total (add lines 1a, b, and c)	1d	652,631.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2 Acquisition indebtedness applicable to line 1 assets	2	0.
3 Subtract line 2 from line 1d	3	652,631.
4 Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	9,789.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	642,842.
6 Minimum investment return. Enter 5% of line 5	6	32,142.

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

1 Minimum investment return from Part X, line 6		1	32,142.
2a Tax on investment income for 2016 from Part VI, line 5	2a	2,385.	
b Income tax for 2016. (This does not include the tax from Part VI.)	2b		
c Add lines 2a and 2b	2c	2,385.	
3 Distributable amount before adjustments. Subtract line 2c from line 1	3	29,757.	
4 Recoveries of amounts treated as qualifying distributions	4	0.	
5 Add lines 3 and 4	5	29,757.	
6 Deduction from distributable amount (see instructions)	6	0.	
7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	29,757.	

Part XII Qualifying Distributions (see instructions)

1 Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	740,013.
b Program-related investments - total from Part IX-B	1b	0.
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3 Amounts set aside for specific charitable projects that satisfy the:		
a Suitability test (prior IRS approval required)	3a	
b Cash distribution test (attach the required schedule)	3b	
4 Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	740,013.
5 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	2,385.
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	737,628.

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2015	(c) 2015	(d) 2016
1 Distributable amount for 2016 from Part XI, line 7				29,757.
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2016:				
a From 2011	398,365.			
b From 2012	500,230.			
c From 2013	480,371.			
d From 2014	607,125.			
e From 2015	507,505.			
f Total of lines 3a through e	2,493,596.			
4 Qualifying distributions for 2016 from Part XII, line 4: ▶ \$	740,013.			
a Applied to 2015, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2016 distributable amount				29,757.
e Remaining amount distributed out of corpus	710,256.			
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:	3,203,852.			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
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.		
e 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	398,365.			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	2,805,487.			
10 Analysis of line 9:				
a Excess from 2012	500,230.			
b Excess from 2013	480,371.			
c Excess from 2014	607,125.			
d Excess from 2015	507,505.			
e Excess from 2016	710,256.			

THE STANLEY AND ROBERTA BOGEN CHARITABLE
FOUNDATION,

Form 990-PF (2016)

94-3457573 Page 11

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
ALBERT EINSTEIN COLLEGE OF MEDICINE 1300 MORRIS PARK BRONX, NY 10461	NONE	PUBLIC CHARITY	GENERAL SUPPORT	1,000.
AMERICAN FRIENDS OF MEIR PANIM 5316 NEW UTRECT AVENUE BROOKLYN, NY 11219	NONE	PUBLIC CHARITY	GENERAL SUPPORT	500.
AMERICAN FRIENDS OF THE HEBREW UNIVERSITY ONE BATTERY PARK PLAZA NEW YORK, NY 10004	NONE	PUBLIC CHARITY	GENERAL SUPPORT	349,369.
AMERICAN FRIENDS OF THE IJC BELGIUM 3330 GARFIELD STREET NW WASHINGTON, DC 20008	NONE	PUBLIC CHARITY	GENERAL SUPPORT	5,000.
AMERICAN FRIENDS OF THE ISRAEL MUSEUM 500 FIFTH AVE NEW YORK, NY 10110	NONE	PUBLIC CHARITY	GENERAL SUPPORT	10,000.
Total SEE CONTINUATION SHEET(S) ▶ 3a				738,970.
b Approved for future payment				
NONE				
Total ▶ 3b				0.

Form 990-PF (2016)

Enter gross amounts unless otherwise indicated.

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

[illegible]

THE STANLEY AND ROBERTA BOGEN CHARITABLE
FOUNDATION,

CONTINUATION FOR 990-PF, PART IV
94-34575 PAGE 1 OF 1

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs MLC Co.		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	1,500 SHARES EXPRESS SCRIPTS HOLDING CO		05/16/13	01/14/16
b	500 SHARES THE TRAVELERS COMPANIES INC.	D	07/07/09	02/03/16
c	2,000 SHARES GENERAL ELECTRIC COMPANY		12/11/09	05/17/16
d	1,000 SHARES S&P RETAIL ETF (SPDR SER TR)		02/10/15	05/17/16
e	500 SHARES COSTCO WHOLESALE CORP		04/14/10	05/26/16
f	500 SHARES THE TRAVELERS COMPANIES INC.	D	07/30/09	07/11/16
g	500 SHARES THE TRAVELERS COMPANIES INC.	D	11/09/10	07/11/16
h	1,000 SHARES THE TRAVELERS COMPANIES INC.	D	07/07/09	08/05/16
i	2,000 SHARES THE TRAVELERS COMPANIES INC.	D	07/07/09	08/31/16
j	3,000 SHARES FORD MOTOR CO		03/28/16	10/18/16
k	3,000 SHARES FORD MOTOR CO		03/28/16	10/24/16
l	2,000 SHARES MORGAN STANLEY	D	04/10/15	12/08/16
m	1,500 SHARES MORGAN STANLEY	D	05/12/10	12/20/16
n				
o				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 118,553.		90,868.	27,685.
b 52,501.		51,504.	997.
c 59,899.		39,545.	20,354.
d 41,069.		48,321.	-7,252.
e 76,567.		40,160.	36,407.
f 59,149.		51,504.	7,645.
g 59,149.		51,504.	7,645.
h 118,473.		103,009.	15,464.
i 236,240.		206,018.	30,222.
j 35,456.		39,349.	-3,893.
k 36,322.		39,349.	-3,027.
l 86,978.		62,190.	24,788.
m 65,084.		46,643.	18,441.
n			
o			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a			27,685.
b			997.
c			20,354.
d			-7,252.
e			36,407.
f			7,645.
g			7,645.
h			15,464.
i			30,222.
j			-3,893.
k			-3,027.
l			24,788.
m			18,441.
n			
o			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }	2	175,476.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter "-0-" in Part I, line 8	3	N/A

THE STANLEY AND ROBERTA BOGEN CHARITABLE
FOUNDATION,

94-3457573

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
AMERICAN FRIENDS OF THE ISRAEL PHILHARMONIC 122 EAST 42ND STREET, SUITE 4507 NEW YORK, NY 10168	NONE	PUBLIC CHARITY	GENERAL SUPPORT	10,000.
AMERICAN ISRAEL CULTURAL FOUNDATION 1140 BROADWAY NEW YORK, NY 10001	NONE	PUBLIC CHARITY	GENERAL SUPPORT	3,000.
BIRTHRIGHT ISRAEL FOUNDATION P.O. BOX 5892 HICKSVILLE, NY 11802	NONE	PUBLIC CHARITY	GENERAL SUPPORT	5,000.
BRIGHAM & WOMEN'S HOSPITAL 75 FRANCIS STREET BOSTON, MA 02115	NONE	PUBLIC CHARITY	GENERAL SUPPORT	1,000.
CENTER FOR CREATIVE EDUCATION 425 ,24TH ST WEST PALM BEACH, FL 33407	NONE	PUBLIC CHARITY	GENERAL SUPPORT	1,000.
CENTRAL PARK CONSERVANCY 14 E 60TH ST, NEW YORK, NY 10022	NONE	PUBLIC CHARITY	GENERAL SUPPORT	500.
CITY OF HOPE 1500 EAST DUARTE ROAD, DUARTE DUARTE, CA 91010	NONE	PUBLIC CHARITY	GENERAL SUPPORT	1,000.
CONGREGATION B'NAI ISRAEL 2710 PARK AVENUE BRIDGEPORT, CT 06604	NONE	PUBLIC CHARITY	GENERAL SUPPORT	3,526.
CONGREGATION RODEPH SHOLOM 2385 PARK AVENUE BRIDGEPORT, CT 06604	NONE	PUBLIC CHARITY	GENERAL SUPPORT	2,500.
DANA-FARBER CANCER INSTITUTE 450 BROOKLINE AVE, BOSTON, MA 02215	NONE	PUBLIC CHARITY	GENERAL SUPPORT	250.
Total from continuation sheets				373,101.

THE STANLEY AND ROBERTA BOGEN CHARITABLE
FOUNDATION,

94-3457573

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
DIDI HIRSCH MENTAL HEALTH 4760 S SEPULVEDA BLVD CULVER CITY, CA 90230	NONE	PUBLIC CHARITY	GENERAL SUPPORT	2,500.
DYSAUTONOMIA FOUNDATION 315 W 39TH ST NEW YORK, NY 10018	NONE	PUBLIC CHARITY	GENERAL SUPPORT	1,000.
FAU FOUNDATION 777 GLADES RD # 10-295 BOCA RATON, FL 33431	NONE	PUBLIC CHARITY	GENERAL SUPPORT	2,000.
FOOD FOR NEEDY 6401 LYONS RD COCONUT CREEK, FL 33073	NONE	PUBLIC CHARITY	GENERAL SUPPORT	11,800.
FRIENDS OF THE ISRAEL DEFENSE FORCES 1430 BROADWAY NEW YORK, NY 10018	NONE	PUBLIC CHARITY	GENERAL SUPPORT	500.
HERBREW FREE LOAN SOCIETY 675 THIRD AVENUE, SUITE 1905 NEW YORK, NY 10017	NONE	PUBLIC CHARITY	GENERAL SUPPORT	1,000.
ISRAEL TENNIS CENTERS FOUNDATION 57 WEST 38TH STREET, SUITE 605 NEW YORK, NY 10018	NONE	PUBLIC CHARITY	GENERAL SUPPORT	2,500.
JEWISH FEDERATION OF PALM BEACH COUNTY 4601 COMMUNITY DRIVE WEST PALM BEACH, FL 33417	NONE	PUBLIC CHARITY	GENERAL SUPPORT	5,000.
JEWISH HOME FOUNDATION OF NORTH JERSEY INC 50 EISENHOWER DRIVE PARAMUS, NJ 07652	NONE	PUBLIC CHARITY	GENERAL SUPPORT	5,000.
KENYA EDUCATION FUN 360 E. 72ND ST. C3405 NEW YORK, NY 10021	NONE	PUBLIC CHARITY	GENERAL SUPPORT	900.
Total from continuation sheets				

THE STANLEY AND ROBERTA BOGEN CHARITABLE
FOUNDATION,

94-3457573

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
MEMORIAL SLOAN KETTERING CANCER CENTER 1275 YORK AVENUE NEW YORK, NY 10065	NONE	PUBLIC CHARITY	GENERAL SUPPORT	2,500.
MORSELIFE FOUNDATION INC. 4847 FRED GLADSTONE DRIVE, WEST PALM BEACH, FL 33417	NONE	PUBLIC CHARITY	GENERAL SUPPORT	10,000.
MUSEUM AT ELDRIDGE STREET 12 ELDRIDGE ST, NEW YORK, NY 10002	NONE	PUBLIC CHARITY	GENERAL SUPPORT	500.
NATIONAL MUSEUM OF AMERICAN JEWISH HISTORY 101 SOUTH INDEPENDENCE MALL EAST PHILADELPHIA, PA 19106	NONE	PUBLIC CHARITY	GENERAL SUPPORT	5,000.
NEW YORK HISTORICAL SOCIETY 170 CENTRAL PARK WEST NEW YORK, NY 10024	NONE	PUBLIC CHARITY	GENERAL SUPPORT	6,000.
NEW YORK PATRONS OF THE ARTS IN THE VATICAN MUSEUMS 1165 FIFTH AVENUE APARTMENT 4-D NEW YORK, NY 10029	NONE	PUBLIC CHARITY	GENERAL SUPPORT	2,400.
NORTON MUSEUM OF ART 1451 S OLIVE AVE, WEST PALM BEACH, FL 33401	NONE	PUBLIC CHARITY	GENERAL SUPPORT	5,000.
PALM BEACH COUNTRY CLUB FOUNDATION 760 N. OCEAN BLVD., PALM BEACH, FL 33480	NONE	PUBLIC CHARITY	GENERAL SUPPORT	1,000.
PLANNED PARENTHOOD 434 W 33RD ST NEW YORK, NY 10001	NONE	PUBLIC CHARITY	GENERAL SUPPORT	5,000.
POLY PREP COUNTRY DAY SCHOOL 9216 SEVENTH AVE BROOKLYN, NY 11228	NONE	PUBLIC CHARITY	GENERAL SUPPORT	1,000.
Total from continuation sheets				

THE STANLEY AND ROBERTA BOGEN CHARITABLE
FOUNDATION,

94-3457573

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
PREP FOR PREP 328 W71ST ST NEW YORK, NY 10023	NONE	PUBLIC CHARITY	GENERAL SUPPORT	5,000.
RAYMOND CRAVIS CENTRE FOR THE PERFORMING ARTISTS 701 OKEECHOBEE BLVD WEST PALM BEACH, FL 33401	NONE	PUBLIC CHARITY	GENERAL SUPPORT	10,000.
SALK INSTITUTE PO BOX 85800 SAN DIEGO, CA 92186	NONE	PUBLIC CHARITY	GENERAL SUPPORT	5,000.
SINAI SCHOOLS 1485 TEANECK ROAD TEANECK, NJ 07666	NONE	PUBLIC CHARITY	GENERAL SUPPORT	500.
ST. ANDREW'S SCHOOL 350 NOXONTOWN ROAD TOWNSEND, DE 19734	NONE	PUBLIC CHARITY	GENERAL SUPPORT	5,000.
SUSAN G. KOMEN 5005 LBJ FREEWAY, SUITE 250 DALLAS, TX 75244	NONE	PUBLIC CHARITY	GENERAL SUPPORT	5,000.
TEMPLE ISRAEL OF THE CITY OF NEW YORK 112 EAST 75TH ST NEW YORK, NY 10021	NONE	PUBLIC CHARITY	GENERAL SUPPORT	8,015.
THE FRICK COLLECTION 1 E70TH ST NEW YORK, NY 10021	NONE	PUBLIC CHARITY	GENERAL SUPPORT	1,200.
THE METROPOLITAN MUSEUM ART 6 EAST 82ND STREETMANHATTAN, NEW YORK, NY 10028	NONE	PUBLIC CHARITY	GENERAL SUPPORT	1,500.
THE METROPOLITAN OPERA 70 LINCOLN CTR NEW YORK, NY 10023	NONE	PUBLIC CHARITY	GENERAL SUPPORT	6,000.
Total from continuation sheets				

THE STANLEY AND ROBERTA BOGEN CHARITABLE
FOUNDATION,

94-3457573

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
THE NEW YORK PHILHARMONIC 10 LINCOLN CENTER PLAZA NEW YORK, NY 10023	NONE	PUBLIC CHARITY	GENERAL SUPPORT	1,000.
THE PUBLIC THEATER 425 LAFAYETTE ST, NEW YORK, NY 10003	NONE	PUBLIC CHARITY	GENERAL SUPPORT	17,600.
THE TRUSTEES OF THE UNIVERSITY OF PENNSYLVANIA 1801 SPRUCE ST, PHILADELPHIA, PA 19107	NONE	PUBLIC CHARITY	GENERAL SUPPORT	125,000.
THE WASHINGTON INSTITUTE FOR NEAR EAST POLICY 1828 L ST NW # 1050 WASHINGTON, DC 20036	NONE	PUBLIC CHARITY	GENERAL SUPPORT	18,000.
THIRTEEN 825 EIGHTH AVENUE NEW YORK, NY 10019	NONE	PUBLIC CHARITY	GENERAL SUPPORT	500.
TOWN OF PALM BEACH UNITED WAY 44 COCOANUT ROW PALM BEACH, FL 33480	NONE	PUBLIC CHARITY	GENERAL SUPPORT	10,000.
UJA FEDERATION OF NEW YORK 130 E 59TH ST. NEW YORK, NY 10022	NONE	PUBLIC CHARITY	GENERAL SUPPORT	25,000.
WHITNEY MUSEUM OF AMERICAN ART 945 MADISON AVE, MANHATTAN, NY 10021	NONE	PUBLIC CHARITY	GENERAL SUPPORT	250.
JEWISH REVIEW OF BOOK P.O. BOX 3000 DENVER, CO 80202	NONE	PUBLIC CHARITY	GENERAL SUPPORT	2,000.
FIRST TEE OF THE PALM BEACHES-BOBBY BENSON SCHOLARSHIP FUND 7301 HAVERHILL ROAD RIVIERA BEACH, FL 33407	NONE	PUBLIC CHARITY	GENERAL SUPPORT	500.
Total from continuation sheets				

THE STANLEY AND ROBERTA BOGEN CHARITABLE
FOUNDATION,

94-3457573

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
JOSEPH AND FLORENCE MANDEL JEWISH DAY SCHOOL 26500 SHAKER BLVD. BEACHWOOD, OH 44122	NONE	PUBLIC CHARITY	GENERAL SUPPORT	1,000.
JUVENILE PEDIATRIC KIDNEY FOUNDATION 30 E 33RD STREET #3 NEW YORK, NY 10016	NONE	PUBLIC CHARITY	GENERAL SUPPORT	500.
SID JACOBSON JEWISH COMMUNITY CENTER 300 FOREST DR. GREENVALE, NY 11548	NONE	PUBLIC CHARITY	GENERAL SUPPORT	250.
AMERICAN FRIENDS OF THE JEWISH MUSEUM OF GREECE PO BOX 2010 NEW YORK, NY 10185	NONE	PUBLIC CHARITY	GENERAL SUPPORT	500.
CEDARS-SINAI MEDICAL CENTER MEMO: WOMEN'S HEART ALLIANCE 127S. SAN VICENTE BLVD. LOS ANGELES, CA 90048	NONE	PUBLIC CHARITY	GENERAL SUPPORT	10,000.
JAMES BEARD FOUNDATION 167 W 12TH ST. NEW YORK, NY 10011	NONE	PUBLIC CHARITY	GENERAL SUPPORT	750.
CHILDREN'S HEALTH FUND 215 WEST 125TH STREET, 3RD FL NEW YORK, NY 10027	NONE	PUBLIC CHARITY	GENERAL SUPPORT	1,000.
NEW YORK-PRESBYTERIAN FUND INC 525 EAST 68TH STREET, BOX 123 NEW YORK, NY 10065	NONE	PUBLIC CHARITY	GENERAL SUPPORT	1,000.
MOVEMBER FOUNDATION PO BOX 1595 CULVER CITY, CA 90232	NONE	PUBLIC CHARITY	GENERAL SUPPORT	250.
MOUNT SINAI HEALTH SYSTEM PETER KRUEGER CENTER FOR 25-10 30TH AVENUE ASTORIA NEW YORK, NY 11102	NONE	PUBLIC CHARITY	GENERAL SUPPORT	250.
Total from continuation sheets				

94-3457573

3 Grants and Contributions Paid During the Year (Continuation)

623631
04-01-18

Schedule B(Form 990, 990-EZ,
or 990-PF)Department of the Treasury
Internal Revenue Service**Schedule of Contributors**

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

OMB No. 1545-0047

2016

Name of the organization

THE STANLEY AND ROBERTA BOGEN CHARITABLE
FOUNDATION,

Employer identification number

94-3457573

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

- ☐ 501(c)() (enter number) organization
- ☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
- ☐ 527 political organization

Form 990-PF

- ☒ 501(c)(3) exempt private foundation
- ☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
- ☐ 501(c)(3) taxable private foundation

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

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

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. ▶ \$ _____

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

LHA For Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2016)

Name of organization
**THE STANLEY AND ROBERTA BOGEN CHARITABLE
 FOUNDATION,**

Employer identification number

94-3457573

Part I Contributors (See instructions) Use duplicate copies of Part I if additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	STANLEY AND ROBERTA BOGEN 956 FIFTH AVENUE NEW YORK, NY 10075	\$ 225,890.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
2	STANLEY AND ROBERTA BOGEN 956 FIFTH AVENUE NEW YORK, NY 10075	\$ 432,100.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
3	STANLEY AND ROBERTA BOGEN 956 FIFTH AVENUE NEW YORK, NY 10075	\$ 451,076.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)

Name of organization

THE STANLEY AND ROBERTA BOGEN CHARITABLE
FOUNDATION,

Employer identification number

94-3457573

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

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	1400 SHS - 3M CO.	\$ 225,890.	03/11/16
2	10000 SHS - MORGAN STANLEY	\$ 432,100.	12/08/16
3	3857 SHS - THE TRAVELLERS INC.	\$ 451,076.	07/29/16
		\$	
		\$	
		\$	

Name of organization

THE STANLEY AND ROBERTA BOGEN CHARITABLE
FOUNDATION,

Employer identification number

94-3457573

Part III

Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year (Enter this info once) ▶ \$

Use duplicate copies of Part III if additional space is needed

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

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
SANFORD BERNSTEIN & CO.	64,543.	0.	64,543.	64,543.	
TO PART I, LINE 4	64,543.	0.	64,543.	64,543.	

FORM 990-PF ACCOUNTING FEES STATEMENT 2

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
CITRIN COOPERMAN & CO. LLP	2,305.	1,537.		768.
TO FORM 990-PF, PG 1, LN 16B	2,305.	1,537.		768.

FORM 990-PF TAXES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
NY TAXES	275.	0.		275.
TO FORM 990-PF, PG 1, LN 18	275.	0.		275.

FORM 990-PF CORPORATE STOCK STATEMENT 4

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
4000 GENERAL ELECTRIC.	79,091.	126,400.
1000 SPDR SER TR	48,321.	44,070.
5357 THE TRAVELERS COMPANIES INC6	605,590.	655,804.
10500 MORGAN STANLEY	447,649.	443,625.
1000 COSTCO WHOLESALE CORP	80,319.	160,110.
2400 WELLS FARGO & CO.	85,085.	132,264.
3400 3M COMPANY	477,590.	607,138.

THE STANLEY AND ROBERTA BOGEN CHARITABLE

94-3457573

3500 ABBOTT LAB	141,377.	134,435.
1500 EXPRESS SCRIPTS HOLDING CO	0.	0.
2000 ISHARES RUSSELL 2000 ETF	231,852.	269,700.
1000 ANTHEM INC	85,774.	143,770.
5000 ISHARES U S HOME CONSTRUCTION ETF	132,527.	137,400.
4000 PIMCO DYNAMIC CR INCOME FD COM SHS	81,256.	80,880.
2000 CONOCOPHILLIPS	80,429.	100,280.
TOTAL TO FORM 990-PF, PART II, LINE 10B	2,576,860.	3,035,876.

FORM 990-PF LIST OF SUBSTANTIAL CONTRIBUTORS STATEMENT 5
PART VII-A, LINE 10

NAME OF CONTRIBUTOR

ADDRESS

STANLEY & ROBERTA BOGEN

1345 SIXTH AVE.
NEW YORK, NY 10105