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

Name of foundation MORRIS & RAE SPIVAK FOUNDATION % LANDSMAN FRANK AND BLOCH		A Employer identification number 95-6122693	
Number and street (or P.O. box number if mail is not delivered to street address) 9171 WILSHIRE BOULEVARD NO 650		Room/suite	B Telephone number (see instructions) (310) 274-9922
City or town, state or province, country, and ZIP or foreign postal code BEVERLY HILLS, CA 902105515		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 348,677	J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc., received (attach schedule)	91,961			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch. B				
	3 Interest on savings and temporary cash investments	7	7		
	4 Dividends and interest from securities . . .	24,875	24,875		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a _____				
	7 Capital gain net income (from Part IV, line 2) . . .		0		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances _____				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	116,843	24,882		
	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	2,100	0		2,100
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	60	0		0
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	408	0		0
	24 Total operating and administrative expenses. Add lines 13 through 23	2,568	0		2,100
	25 Contributions, gifts, grants paid	10,664			10,664
	26 Total expenses and disbursements. Add lines 24 and 25	13,232	0		12,764
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	103,611			
	b Net investment income (if negative, enter -0-)		24,882		
c Adjusted net income (if negative, enter -0-)					

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)			Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value			
Assets	1	Cash—non-interest-bearing					
	2	Savings and temporary cash investments	5,066	28,677	28,677		
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____					
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____					
	5	Grants receivable					
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)					
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____					
	8	Inventories for sale or use					
	9	Prepaid expenses and deferred charges					
	10a	Investments—U S and state government obligations (attach schedule)					
	b	Investments—corporate stock (attach schedule)					
	c	Investments—corporate bonds (attach schedule)					
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____					
	12	Investments—mortgage loans	240,000	320,000	320,000		
	13	Investments—other (attach schedule)					
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____					
15	Other assets (describe ▶ _____)						
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	245,066	348,677	348,677			
Liabilities	17	Accounts payable and accrued expenses					
	18	Grants payable					
	19	Deferred revenue					
	20	Loans from officers, directors, trustees, and other disqualified persons					
	21	Mortgages and other notes payable (attach schedule)					
	22	Other liabilities (describe ▶ _____)					
	23	Total liabilities (add lines 17 through 22)	0	0			
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.						
	24	Unrestricted					
	25	Temporarily restricted					
	26	Permanently restricted					
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.						
	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	245,066	348,677			
	30	Total net assets or fund balances (see instructions)	245,066	348,677			
31	Total liabilities and net assets/fund balances (see instructions) .	245,066	348,677				

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	245,066
2	Enter amount from Part I, line 27a	2	103,611
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	348,677
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	348,677

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			

(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			

(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			

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	
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 { }	3	

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

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

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

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



Yes



No

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

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


(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2015	25,281	183,244	0 137964
2014	23,116	102,820	0 224820
2013	17,092	31,253	0 546891
2012	16,652	5,936	2 805256
2011	19,728	8,254	2 390114
2 Total of line 1, column (d)			2 6 105045
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 1 221009
4 Enter the net value of noncharitable-use assets for 2016 from Part X, line 5			4 298,346
5 Multiply line 4 by line 3			5 364,283
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 249
7 Add lines 5 and 6			7 364,532
8 Enter qualifying distributions from Part XII, line 4			8 12,764

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

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

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 type="checkbox"/> and enter 1% of Part I, line 27b	1	498
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	498
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	498
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	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed ▶	9	498
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 ▶ Refunded ▶	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?	1a	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities</i>	1b	No
c Did the foundation file Form 1120-POL for this year?	1c	No
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? <i>If "Yes," attach a detailed description of the activities</i>	2	No
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? <i>If "Yes," attach a conformed copy of the changes</i>	3	No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	No
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T</i>	5	No
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?	6	Yes
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ CA _____		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation</i> .	8b	Yes
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)? <i>If "Yes," complete Part XIV</i>	9	No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i> 	10	Yes

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	Yes	
14	The books are in care of ► LANDSMAN FRANK BLOCH Telephone no ► (310) 274-9922			

Located at **►** 9171 WILSHIRE BLVD SUITE 650 BEVERLY HILLS CA ZIP+4 **►** 902105515

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

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

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

1a	During the year did the foundation (either directly or indirectly)		Yes	No
	(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)? <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here. ► <input type="checkbox"/>	1b		
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2016? <input type="checkbox"/>	1c		No
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 ► 20____, 20____, 20____, 20____			
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). <input type="checkbox"/>	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ► 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If "Yes," did it have excess business holdings in 2016 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2016). <input type="checkbox"/>	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
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		No

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

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

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

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).				
(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
ALFRED I SPIVAK 703 NORTH ALTA DRIVE BEVERLY HILLS, CA 90210	PRESIDENT 2 00	0	0	0
SHARON SPIVAK 703 NORTH ALTA DRIVE BEVERLY HILLS, CA 90210	SECRETARY 0 00	0	0	0
MICHAEL SPIVAK 703 NORTH ALTA DRIVE BEVERLY HILLS, CA 90210	TREASURER 0 00	0	0	0
BETTY SPIVAK 703 NORTH ALTA DRIVE BEVERLY HILLS, CA 90210	VICE-PRESIDENT 0 00	0	0	0
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	Title, and average hours per week (b) devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
NONE				
Total number of other employees paid over \$50,000. ▶				0

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.		0

Part IX-A Summary of Direct Charitable Activities

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

	Expenses
1	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0

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	290,000
b	Average of monthly cash balances.	1b	12,889
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	302,889
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	302,889
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	4,543
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	298,346
6	Minimum investment return. Enter 5% of line 5.	6	14,917

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	14,917
2a	Tax on investment income for 2016 from Part VI, line 5.	2a	498
b	Income tax for 2016 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	498
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	14,419
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	14,419
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	14,419

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	12,764
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	12,764
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions).	5	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	12,764

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				14,419
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2016				
a From 2011.				19,315
b From 2012.				16,355
c From 2013.				15,559
d From 2014.				18,193
e From 2015.				16,386
f Total of lines 3a through e.	85,808			
4 Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ <u>12,764</u>				
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.				12,764
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a))	1,655			1,655
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	84,153			
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 instructions			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 (see instructions). . . .	17,660			
9 Excess distributions carryover to 2017. Subtract lines 7 and 8 from line 6a	66,493			
10 Analysis of line 9				
a Excess from 2012.				16,355
b Excess from 2013.				15,559
c Excess from 2014.				18,193
d Excess from 2015.				16,386
e Excess from 2016.				

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

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

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

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

	Tax year	Prior 3 years			(e) Total
	(a) 2016	(b) 2015	(c) 2014	(d) 2013	
b 85% of line 2a					
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					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . .					
c "Support" alternative test—enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 Information Regarding Foundation Managers:

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

ALFRED I SPIVAK

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

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

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

a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed

BETTY SPIVAK
9171 WILSHIRE BLVD STE 650
BEVERLY HILLS, CA 90210
(310) 274-9922

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

IN WRITING, INDICATING CHARITABLE PURPOSE AND IRS CHARITABLE QUALIFICATION

c Any submission deadlines

NONE

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

CONTRIBUTIONS ARE MADE FOR HEALTH, WELFARE, & EDUCATION AND TO CERTAIN RELIGIOUS ORGANIZATIONS

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i> See Additional Data Table				
Total ▶ 3a				10,664
b <i>Approved for future payment</i>				
Total ▶ 3b				0

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments. . . .					
3 Interest on savings and temporary cash investments			14	7	
4 Dividends and interest from securities. . . .			14	24,875	
5 Net rental income or (loss) from real estate					
a Debt-financed property.					
b Not debt-financed property.					
6 Net rental income or (loss) from personal property					
7 Other investment income.					
8 Gain or (loss) from sales of assets other than inventory					
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a _____					
b _____					
c _____					
d _____					
e _____					
12 Subtotal Add columns (b), (d), and (e). .		0		24,882	0
13 Total. Add line 12, columns (b), (d), and (e).			13		24,882

(See worksheet in line 13 instructions to verify calculations)

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

[illegible]

Part XVII

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

[illegible]

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

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

(a) Name of organization	(b) Type of organization	(c) Description of relationship

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

Print/Type preparer's name ROBERT A LAKE CPA	Preparer's Signature	Date	Check if self-employed ► <input type="checkbox"/>	PTIN P00167990
Firm's name ► LANDSMAN FRANK AND BLOCH				Firm's EIN ► 95-2783759
Firm's address ► 9171 WILSHIRE BL 650 BEVERLY HILLS, CA 902105515				Phone no (310) 274-9922

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
AIDS PROJECT LOS ANGELES 611 SOUTH KINGSLEY DRIVE LOS ANGELES, CA 90005	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	100
ALS ASSOCIATION PO BOX 565 AGOURA HILLS, CA 91376	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	100
ALZHEIMERS ASSOCIATION CA SOUTHLAND CHAPTER 1880 CENTURY PARK EAST STE-612 LOS ANGELES, CA 90067	NONE	PUBLIC CHARITY	HEALTH, WELFARE & EDUCATION	100
AMERICAN COMMITTEE FOR SHAARE ZEDEK MED CTR 55 WEST 39TH STREET 4TH FLOOR NEW YORK, NY 10018	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	100
AMERICAN COMMITTEE OF WEISZMANN INSTOF SCIENCE (ACWIS) 633 THIRD AVENUE NEW YORK, NY 10017	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	100
AMERICAN DIABETES ASSOCIATION 1701 NORTH BEAUREGARDS ST ALEXANDRIA, VA 22311	NONE	PUBLIC CHARITY	HEALTH, WELFARE & EDUCATION	100
AMERICAN FRIENDS OF BAR-IIAN UNIVERSITY 160 EAST 56TH STREET 5 NEW YORK, NY 10022	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	100
AMERICAN FRIENDS OF MAGEN DAVID ADOM 6505 WILSHIRE BLVD LOS ANGELES, CA 90048	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	100
AMERICAN FRIENDS OF TEL AVIV UNIVERSITY 11766 WILSHIRE BLVD STE-1110 LOS ANGELES, CA 90025	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	100
AMERICAN FRIENDS OF THE HEBREW UNIVERSITY 11500 WEST OLYMPIC BLVD STE-512 LOS ANGELES, CA 90064	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	100
AMERICAN HEART ASSOCIATION 7272 GREENVILLE AVE DALLAS, TX 75231	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	100
AMERICAN INSTITUTE OF CANCER RESEARCH 1759 R STREET NW WASHINGTON, DC 20009	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	100
AMERICAN JEWISH COMMITTEE (AJC) 9911 WEST PICO BLVD LOS ANGELES, CA 90035	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	100
AMERICAN JEWISH HISTORICAL SOCIETY 15 WEST 16TH STREET NEW YORK, NY 10011	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	100
AMERICAN KIDNEY FUND 5490 VENTURA BLVD SHERMAN OAKS, CA 91403	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	100
Total ►				10,664
3a				

Form 990FP Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
AMERICAN LUNG ASSOCIATION 3325 WILSHIRE BLVD LOS ANGELES, CA 90010	NONE	PUBLIC CHARITY	HEALTH, WELFARE & EDUCATION	100
AMERICAN SOCIETY FOR YAD VASHEM 500 5TH AVENUE 42 NEW YORK, NY 10110	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	100
AMIT WOMEN 1122 S ROBERTSON BLVD 9 LOS ANGELES, CA 90035	NONE	PUBLIC CHARITY	RELIGIOUS PROGRAMMING	360
ANTI-DEFAMATION LEAGUE 10495 SANTA MONICA BLVD LOS ANGELES, CA 90025	NONE	PUBLIC CHARITY	HEALTH, WELFARE & EDUCATION	1,000
ARTHRITIS FOUNDATION 800 WEST 6TH ST STE 1250 LOS ANGELES, CA 90017	NONE	PUBLIC CHARITY	HEALTH, WELFARE & EDUCATION	100
BET TZEDEK 3250 WILSHIRE BLVD 13TH FLOOR LOS ANGELES, CA 90010	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	50
BIRTHRIGHT ISRAEL FOUNDATION 33 EAST 33RD STREET 7TH FLOOR NEW YORK, NY 10016	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	250
BOYS TOWN JERUSALEM 1 PENN PLAZA SUITE-6250 NEW YORK, NY 10119	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	1,000
CHMOL 5225 NEW UTRECHT AVENUE BROOKLYN, NY 11219	NONE	PUBLIC CHARITY	HEALTH, WELFARE & EDUCATION	36
CHABAD OF BURBANK 2415 WEST MAGNOLIA BLVD BURBANK, CA 91506	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	1,500
COUNT ME IN (DISABLED CHILDREN FOUNDATION) 788 EAST 4TH STREET BROOKLYN, NY 11218	NONE	PUBLIC CHARITY	RELIGIOUS PROGRAMMING	36
CYSTIC FIBROSIS FOUNDATION 4929 WILSHIRE BLVD 760 LOS ANGELES, CA 90010	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	100
FEED ISRAEL 5229 NEW UTRECHT AVENUE STE-400 BROOKLYN, NY 11219	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	36
FRIENDS OF THE ISRAEL DEFENSE FORCE 1430 BROADWAY NEW YORK, NY 10018	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	100
FRIENDS OF THE UNITED HATZALAH 208 EAST 51ST STREET STE-303 NEW YORK, NY 10022	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	36
Total ► 3a				10,664

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
GUARDIANS OF THE FLAME 1399 SOUTH ROXBURY DRIVE LOS ANGELES, CA 90035	NONE	PUBLIC CHARITY	RELIGIOUS PROGRAMMING	500
HIAS 333 SEVENTH AVE 16TH FLOOR NEW YORK, NY 10001	NONE	PUBLIC CHARITY	RELIGIOUS PROGRAMMING	100
JEWISH FAMILY SERVICE 3580 WILSHIRE BLVD 7TH FLOOR LOS ANGELES, CA 90010	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	100
JEWISH FREE LOAN ASSOCIATION 6505 WILSHIRE BLVD LOS ANGELES, CA 90048	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	100
JEWISH WAR VETERANS OF THE USA INC 2615 S GRAND AVE LOS ANGELES, CA 90007	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	100
LEUKEMIA & LYMPHOMIA SOCIETY LA CHAPTER 6033 WEST CENTURY BLVD LOS ANGELES, CA 90045	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	100
MACCABI USASFI 1511 WALNUT STREET STE 401 PHILADELPHIA, PA 19102	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	36
MACULAR DEGENERATION RESEARCH 22512 GATEWAY CENTER DRIVE CLARKSBURG, MD 20871	NONE	PUBLIC CHARITY	HEALTH, WELFARE & EDUCATION	100
MAKE A WISH FOUNDATION 1875 CENTURY PARK EAST LOS ANGELES, CA 90067	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	100
MAZON 10495 SANTA MONICA BLVD LOS ANGELES, CA 90025	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	136
MULTIPLE SCLEROSIS ASSN OF AMERICA 706 HADDONFIELD ROAD CHERRY HILL, NJ 08002	NONE	PUBLIC CHARITY	HEALTH, WELFARE & EDUCATION	100
NATIONAL JEWISH HEALTH 1400 JACKSON STREET DENVER, CO 80206	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	100
SMILE TRAIN PO BOX 96231 WASHINGTON, DC 20090	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	100
ST JUDE CHILDREN HOSPITAL 12365 LEWIS STREET GARDEN GROVE, CA 92840	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	100
UNITED STATES HOLOCAUST MEMORIAL MUSEUM 100 RAOUL WALLENBERG PLACE SW WASHINGTON, DC 200242126	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	100
Total ►				10,664
3a				

Form 990FP Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
WORLD JEWISH CONGRESS 501 MADISON AVENUE NEW YORK, NY 10022	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	1,800
YESHIVA BETH MOSHE 930 HICKORY STREET SCRANTON, PA 18505	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	36
YESHIVA GEDOLAH OF LOS ANGELES 5444 WEST OLYMPIC BLVD LOS ANGELES, CA 90036	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	36
YESHIVA RAV ISSACSOHN 555 NORTH LA BREA AVENUE LOS ANGELES, CA 90036	NONE	PUBLIC CHARITY	RELIGIOUS PROGRAMMING	36
YIDDISH BOOK CENTER 1021 WEST STREET AMHERST, MA 01002	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	100
ZIONIST ORGANIZATION OF AMERICA 4 EAST 34 STREET 3RD FLOOR NEW YORK, NY 10016	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	100
JEWISH FEDERATION OF BATON ROUGE 4845 JAMESTOWN AVE BATON ROUGE, LA 70808	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	180
LUPUS FOUNDATION 2121 K STREET NW STE 200 WASHINGTON, DC 20037	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	100
MUSCULAR DYSTROPHY ASSN 6167 BRISTOL PKY STE 325 CULVER CITY, CA 90230	NONE	PUBLIC CHARITY	HEALTH, EDUCATION & WELFARE	100
Total ►				10,664
3a				

TY 2016 Accounting Fees Schedule**Name:** MORRIS & RAE SPIVAK FOUNDATION

% LANDSMAN FRANK AND BLOCH

EIN: 95-6122693

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	2,100	0		2,100

TY 2016 Other Expenses Schedule

Name: MORRIS & RAE SPIVAK FOUNDATION
% LANDSMAN FRANK AND BLOCH

EIN: 95-6122693

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT INCOME TAX	267	0		0
CHECK PRINTING	141	0		0

**TY 2016 Substantial Contributors
Schedule**

Name: MORRIS & RAE SPIVAK FOUNDATION
% LANDSMAN FRANK AND BLOCH

EIN: 95-6122693

Name	Address
ALFRED BETTY SPIVAK	703 NORTH ALTA DRIVE BEVERLY HILLS, CA 90210

TY 2016 Taxes Schedule

Name: MORRIS & RAE SPIVAK FOUNDATION
% LANDSMAN FRANK AND BLOCH

EIN: 95-6122693

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FILING FEES	60	0		0

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 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 MORRIS & RAE SPIVAK FOUNDATION % LANDSMAN FRANK AND BLOCH	Employer identification number 95-6122693

Organization type (check one)

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

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

General Rule

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

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year. ▶ \$ _____

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

Name of organization MORRIS & RAE SPIVAK FOUNDATION % LANDSMAN FRANK AND BLOCH	Employer identification number 95-6122693
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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	ALFRED AND BETTY SPIVAK	\$ 80,000	Person <input checked="" type="checkbox"/>
	703 NORTH ALTA DRIVE		Payroll <input type="checkbox"/>
	BEVERLY HILLS, CA90210		Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
2	ALFRED AND BETTY SPIVAK	\$ 3,375	Person <input checked="" type="checkbox"/>
	703 NORTH ALTA DRIVE		Payroll <input type="checkbox"/>
	BEVERLY HILLS, CA90210		Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
3	ALFRED AND BETTY SPIVAK	\$ 1,836	Person <input checked="" type="checkbox"/>
	703 NORTH ALTA DRIVE		Payroll <input type="checkbox"/>
	BEVERLY HILLS, CA90210		Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
4	ALFRED AND BETTY SPIVAK	\$ 3,375	Person <input checked="" type="checkbox"/>
	703 NORTH ALTA DRIVE		Payroll <input type="checkbox"/>
	BEVERLY HILLS, CA90210		Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
5	ALFRED AND BETTY SPIVAK	\$ 3,375	Person <input checked="" type="checkbox"/>
	703 NORTH ALTA DRIVE		Payroll <input type="checkbox"/>
	BEVERLY HILLS, CA90210		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)

Employer identification number

95-6122693

Part II	Noncash Property
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[illegible]

Name of organization MORRIS & RAE SPIVAK FOUNDATION % LANDSMAN FRANK AND BLOCH	Employer identification number 95-6122693
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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 information once. See instructions.) ► \$ _____

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	
(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	
(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	
(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	