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

2016

Department of the Treasury Internal Revenue Service

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

Open to Public Inspection

Fo	czle	ndar	year 2016 or tax year beginning	1	0/01 , 2016,	and ending 9	/30) , 2017	
	12 A N	ME	& DAVID JACKSON FOUN	רייי דייי ארד	OM		Α	Employer identification nur 22-6821580	nber
			BOX 7998 (PO BOX 52			ŀ	В	Telephone number (see inst	ructions)
M)	AMI	, F	L 33152		,			908-273-3670	
							С	If exemption application is	pending, check here
G	G Check all that apply Initial return Initial return of a former public charity						D	1 Foreign organizations, chec	k here
			Final return		Amended return				
	01		Address chang		Name change			2 Foreign organizations meet here and attach computation	
Н	Che		pe of organization Sectication 4947(a)(1) nonexempt chari		(c)(3) exempt private f		E	If private foundation status	was terminated
$\overline{}$	Fair r				ounting method X C		-	under section 507(b)(1)(A)	
·	(from		II, column (c), line 16)		Other (specify)		F	If the foundation is in a 60	
_	▶ \$			Part I,	column (d) must be or	cash basis)		under section 507(b)(1)(B)	, check here
Pa	art I		nalysis of Revenue and openses (The total of amounts in	,	(a) Revenue and expenses per books	(b) Net investmer income	ıt	(c) Adjusted net income	(d) Disbursements for charitable
		co	lumns (b), (c), and (d) may not r	eces-	expenses per books	income		Income	purposes
,			rily equal the amounts in column se instructions))	(a)					(cash basis only)
k^-		1	Contributions, gifts, grants, etc., received (attach sched						
1		2	Check ► X if the foundation is not required to atta	ich Sch B					0
		3	Interest on savings and temporary cash investments						
		4 5 a	Dividends and interest from securities Gross rents		23,160.	23,16	0.	23,160.	
			Net rental income or (loss)						
on	R		Net gain or (loss) from sale of assets not on line 10		12.				
	E V	_	Gross sales price for all assets on line 6a	27.		,	_		
	E N	7 8	Capital gain net income (from Part IV, line Net short-term capital gain	2)	DECEIVE	<u> </u>	<u>2.</u>	12.	
8	ΰ	9	Income modifications		RECEIVEL			12.	
FEB	E	10 a	Gross sales less returns and	2	1 0 0010	SO			-
Π .		b	Less Cost of	822	H NOV 1 9 2018	S		Ł	
Ż		c	goods sold Gross profit or (loss) (attach schedule).	- 1"		<u> </u>			
		11	Other income (attach schedule)	- 1	OGDEN, U				
Z		12	Total Add lines 1 through 11	-	23,172.	23,17	2	23,172.	
SCANNED		13	Compensation of officers, directors, trustee	s, etc -	23,172.	23,17	۷.	23,172.	
UJ		14	Other employee salaries and wages						
		15	Pension plans, employee benefits						
	A D		Legal fees (attach schedule) Accounting fees (attach sch) SEE	ST 1	2,205.	2,20	5.	2,205.	
	M		Other professional fees (attach sch)		2,203.	2,20	<u> </u>	2,200.	
Q P	N S	17	Interest	D) 4 0					
O P E R A T	ŤR	18	Taxes (attach scheduleXsee instrs) SEE ST	LM Z	1,654.	49	<u> 5.</u>		
Ą	Ą	19	Depreciation (attach schedule) and depletion						`
N G	V E	20	Occupancy						
		21 22	Travel, conferences, and meetings Printing and publications.						
A N D	X P	23	Other expenses (attach schedule)						
	EXPENSES		Takat and aking a takat a takat a						
	S E S	24	Total operating and administrative expenses Add lines 13 through 23		3,859.	2,70	0.	2,205.	
	•	25	Contributions, gifts, grants paid PART	ΧV	72,500.	, J _rs ¥	ر, '	, a e	72,500.
		26	Total expenses and disbursements Add lines 24 and 25		76,359.	2,70	n	2,205.	72,500.
_		27	Subtract line 26 from line 12:						
		1	Excess of revenue over expenses and disbursements		-53,187.		<u>a</u> 1	" · ·	
		1	Net investment income (if negative, enter	-0)	33,137.	20,47	12.	. 0	
_			Adjusted net income (if negative, enter -C	-)	9 5 1		-	20,967.	
B	AA F	or Pa	perwork Reduction Act Notice,	see ins	structions.	TEEA0504L 12	2/16/	16	O Form 990-PF (2016)
								Q1	*

Parl	.11	Balance Sheets Column should be for end-of-year amounts only	Beginning of year	End o	year		
I all	. 11	Balance Sheets column should be for end-of-year amounts only (See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value		
	1	Cash - non-interest-bearing	20,869.	6,825.	6,825.		
	2	Savings and temporary cash investments					
	3 Accounts receivable ►		1	(1) (3) (4)	The letter of 1		
		Less allowance for doubtful accounts					
	4	Pledges receivable	· · · · · · · · · · · · · · · · · · ·	Water Manager	(2000年) (2000年)		
		Less allowance for doubtful accounts		2 0.00			
	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 sch)	ing factor of the control of the	Lie All Million Edward	を作るとは、		
A		Less allowance for doubtful accounts	to it to the base of the base		31.1.2.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1		
S	8	Inventories for sale or use					
A S E T	9	Prepaid expenses and deferred charges			<u> </u>		
T S	_	a Investments – U.S. and state government					
•	100	obligations (attach schedule)					
	ŀ	Investments — corporate stock (attach schedule)	1,331,330.	1,604,774.	1,604,774.		
		: Investments — corporate bonds (attach schedule)					
	11	Investments - land, buildings, and	AND THE RESERVE OF THE PARTY OF	AND THE RESERVE OF THE PARTY OF	William William		
		equipment basis.		100 miles	(文化·1)		
		Less accumulated depreciation (attach schedule)					
	12	Investments - mortgage loans					
	13	Investments - other (attach schedule)					
	14	Land, buildings, and equipment basis ►	773	ある という 大学 ない かんかい	1999年 17日本		
		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)	1,352,199.	1,611,599.	1,611,599.		
Ŀ	17	Accounts payable and accrued expenses			AND THE PERSON NAMED IN		
Å	18	Grants payable					
B	19	Deferred revenue					
-	20	Loans from officers, directors, trustees, & other disqualified persons					
Ī	21	Mortgages and other notes payable (attach schedule)					
Ţ	22	Other liabilities (describe ►)					
Ė		7 1 12 1222 (c. 14 to c. 17 the court 20)	0	0	**************************************		
<u>s</u>	23	Total liabilities (add lines 17 through 22)	0.	0.			
		Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.					
ΝF	24	Unrestricted	1,352,199.	1,611,599.			
E U T N	25	Temporarily restricted			1		
D	26	Permanently restricted					
A B S A E L A		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.					
	27	Capital stock, trust principal, or current funds					
S N C	28	Paid-in or capital surplus, or land, bldg, and equipment fund					
OE	29	Retained earnings, accumulated income, endowment, or other funds					
ŔS	30	Total net assets or fund balances (see instructions)	1,352,199.	1,611,599.			
	31	Total liabilities and net assets/fund balances (see instructions)	1,352,199.	1,611,599.			
Dar	 	Analysis of Changes in Net Assets or Fund Balance		1,011,333.	4 describer describer 1		
			<u> </u>				
1	Tota	il net assets or fund balances at beginning of year – Part II, col of-year figure reported on prior year's return)	umn (a), line 30 (must a	agree with	1,352,199.		
2		er amount from Part I, line 27a		2	-53,187.		
3		increases not included in line 2 (itemize).	3	3	312,587.		
Л					1,611,599.		
~ 5	4 Add lines 1, 2, and 3. 4 1,611,599 5 Decreases not included in line 2 (itemize) 5						
5		il net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b)		1,611,599.		
	, 010	in not added on rand balances at one or your time a mine o	,		1,011,000.		

(a) List and describ	e the kind(s) of property sold (e.g., rouse; or common stock, 200 shares	eal estate,	(b) How acq P — Purch D — Donai	ase (mo, day, yr)	(d) Date sold (mo , day, yr)
1a FRAC YUM CHINA	,	·	P		10/31/16
b FRAC DOWDUPONT INC			P		9/08/16
С					
d					
e					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other ba plus expense of sa	le	(h) Gain o (e) plus (f) r	
a4.			2.		2.
b 23.			13.		10
c					<u> </u>
d					
<u>e</u>				··· -	_
Complete only for assets sho	wing gain in column (h) and owned b	· · · · · · · · · · · · · · · · · · ·		(I) Gains (Co	
(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		gain minus col (k), than -0-) or Losses (
a					2.
b					10.
c					
d					
е					
2 Capital gain net income or (n		enter in Part I, line 7 ter -0- in Part I, line 7	-	2	12
	(loss) as defined in sections 1222(5	_			
ın Part I, line 8	ne 8, column (c) (see instructions) 1		-	3	12
Part V Qualification Unde	er Section 4940(e) for Reduce	ed Tax on Net Investn	nent Inco	me	•
If 'Yes,' the foundation does not qu	ection 4942 tax on the distributable a ialify under section 4940(e) Do not o	complete this part		d? Yes	∏ No
1 Enter the appropriate amount in	n each column for each year, see the in	structions 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 as	sets	(d) Distributio (col (b) divide	n ratio
2015					
2014					
2013					
2012					
2011					
2 Total of line 1, column (d)				2	
3 Average distribution ratio for	the 5-year base period — divide the on has been in existence if less than	total on line 2 by 5, or by i 5 years	the	3	
4 Enter the net value of nonch	arıtable-use assets for 2016 from Pa	rt X, line 5		4	
5 Multiply line 4 by line 3				5	
6 Enter 1% of net investment i	ncome (1% of Part I, line 27b)			6	
7 Add lines 5 and 6				7	-
8 Enter qualifying distributions				8	
If line 8 is equal to or greater to	nan line 7, check the box in Part VI, line	e 1b, and complete that part	using a 1%	tax rate See the	

			8215		P	age 4
Part \		- see	nstruc	tions)		
	tempt operating foundations described in section 4940(d)(2), check here and enter 'N/A' on line 1		_			
	ate of ruling or determination letter (attach copy of letter if necessary – see instructions)					
	omestic foundations that meet the section 4940(e) requirements in Part V,	- [1		4	09.
•	neck here and enter 1% of Part I, line 27b					ł
c Al	other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col. (b)	ŀ	-			
	ax under section 511 (domestic section 4947(a)(1) trusts and taxable					
	oundations only Others enter -0-)	ļ	2			<u>0.</u>
	dd lines 1 and 2		3		4	109.
	ubtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter	0-)	4			0.
	ax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		5		4	109.
	redits/Payments					1
	016 estimated tax pmts and 2015 overpayment credited to 2016 6 a					1
	xempt foreign organizations — tax withheld at source 6b					
	ax paid with application for extension of time to file (Form 8868)					
	ackup withholding erroneously withheld		 -			
	otal credits and payments. Add lines 6a through 6d	}	7			0.
	inter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached		8 9			100
	ax due If the total of lines 5 and 8 is more than line 7, enter amount owed				4	109.
	verpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid		10			
_	nter the amount of line 10 to be Credited to 2017 estimated tax		11			
	VII-A Statements Regarding Activities			$\overline{}$	Yes	No
1 a D	ouring the tax year, did the foundation attempt to influence any national, state, or local legislation or did articipate or intervene in any political campaign?	d it		1 a		X
b D	old it spend more than \$100 during the year (either directly or indirectly) for political purposes see Instructions for the definition)?			1 b		X
I 1 0	the answer is 'Yes' to 1a or 1b , attach a detailed description of the activities and copies of any materials publishe In distributed by the foundation in connection with the activities	d				
d E	ind the foundation file Form 1120-POL for this year? Inter the amount (if any) of tax on political expenditures (section 4955) imposed during the year 1) On the foundation \$ 0. (2) On foundation managers \$ inter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on			0. 0.		Х
	oundation managers ►\$ 0.					
	las the foundation engaged in any activities that have not previously been reported to the IRS? f'Yes,' attach a detailed description of the activities			2		X
3 ⊢	las the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles if incorporation, or bylaws, or other similar instruments? If 'Yes,' attach a conformed copy of the chang	ies		3	-	$\frac{1}{x}$
	Old the foundation have unrelated business gross income of \$1,000 or more during the year?			4 a		X
	f 'Yes,' has it filed a tax return on Form 990-T for this year?			4 b	N	/A
	Vas there a liquidation, termination, dissolution, or substantial contraction during the year?			5		Х
	f 'Yes,' attach the statement required by General Instruction T					
	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 con	flict				
	with the state law remain in the governing instrument?			6		X
7 D	old 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			7	X	
8 a E	Enter the states to which the foundation reports or with which it is registered (see instructions)	٠		_		
]	N/A			_		
h l	f 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 ² If 'No,' attach explanation			8 b	- X	
ا ۵	s the foundation claiming status as a private operating foundation within the meaning of section 4942(jor calendar year 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? If 'Yes,' co)(3) oi omplet	4942(j e Part)(5) XIV 9	-	
10 [Did any persons become substantial contributors during the tax year? If 'Yes,' attach a schedule listing their named addresses			10		х
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Par	t VII-A	Statements Regarding Activities (continued)					
11	At any ti within th	me during the year, did the foundation, directly or indirectly, own a controlled entity e meaning of section 512(b)(13)? If 'Yes,' attach schedule (see instructions)			11	Yes	No X
12	Did'the fo	oundation make a distribution to a donor advised fund over which the foundation or a disqualified perso privileges? If 'Yes,' attach statement (see instructions)	n had		12		х
13	Did the f	oundation comply with the public inspection requirements for its annual returns and exemption	applicat	ion?	13	Х	
	Website	=:/ ==					
14		s are in care of ► DAVID B JACKSON Telephone		908-27	<u> </u>	<u> </u>	
15	Located	at THE MAILBOX 7998 (PO BOX 523882 MIAMI FL ZIP + 4 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — Check here	331	52	N/Ā		· — ·
13		er the amount of tax-exempt interest received or accrued during the year	►] 1	15	147.43		∐ N/A
16						Yes	No
10	bank, se	ne during calendar year 2016, did the foundation have an interest in or a signature or other authority of curities, or other financial account in a foreign country?	vei a		16		X
	enter the	instructions for exceptions and filing requirements for FinCEN Form 114. If 'Yes,' name of the foreign country					
Par		Statements Regarding Activities for Which Form 4720 May Be Required		-		1	
1 -		n 4720 if any item is checked in the 'Yes' column, unless an exception applies. ne year did the foundation (either directly or indirectly)				Yes	No
ıa	•	age in the sale or exchange, or leasing of property with a disqualified person?	Yes	XNo	į		
	_	ow money from, lend money to, or otherwise extend credit to (or accept it from) a		Α			
		ualified person?	Yes	XNo	¦		
		ish goods, services, or facilities to (or accept them from) a disqualified person?	Yes	X No	' 		
	(4) Pay	compensation to, or pay or reimburse the expenses of, a disqualified person?	Yes	X No			
	(5) Tran	sfer any income or assets to a disqualified person (or make any of either available the benefit or use of a disqualified person)?	Yes	XNo			
	(6) Agre foun of g	ee to pay money or property to a government official? (Exception. Check 'No' if the dation agreed to make a grant to or to employ the official for a period after termination overnment service, if terminating within 90 days.)	Yes	ΧΝο	:		
Ł	If any ar	nswer is 'Yes' to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in ons section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)	_				
			, -	<u></u>	1 b	N,	/A
	-	ations relying on a current notice regarding disaster assistance check here					Í
C	: Did the that wer	foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, e not corrected before the first day of the tax year beginning in 2016?			1 c		X
2	Taxes o private o	n failure to distribute income (section 4942) (does not apply for years the foundation was a operating foundation defined in section 4942(j)(3) or 4942(j)(5))					
a	At the e	nd of tax year 2016, did the foundation have any undistributed income (lines 6d Part XIII) for tax year(s) beginning before 2016?	Yes	XNo			
		list the years ► 20 _ , 20 _ , 20	☐ 163	MIO			
_			(-) (O)				
t	Are ther relatind)	e any years listed in 2a for which the foundation is not applying the provisions of section 4942. I to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942).	(a)(∠) a)(2) to				<u> </u> j
	all years	s listed, answer 'No' and attach statement – see instructions).			2 b	N	/A
•		ovisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years h	nere				
_	_	_ , 20 , 20 , 20					
3 a	Did the enterpri	foundation hold more than a 2% direct or indirect interest in any business se at any time during the year?	Yes	X No			
ŀ	b If 'Yes,'	did it have excess business holdings in 2016 as a result of (1) any purchase by the foundation	H				
	by the	alified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approve commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or	u			<u></u>	
	(3) the I determi	apse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to ne if the foundation had excess business holdings in 2016)			3 b	N	/A
4:	a Did the	foundation invest during the year any amount in a manner that would jeopardize its					
		le purposes?			4 a		Х
ı	b Did the	foundation make any investment in a prior year (but after December 31, 1969) that could ze its charitable purpose that had not been removed from jeopardy before the first day of					
	the tax	year beginning in 2016?			4 b		X

Form 990-PF (2016) SUZANNE & DAVID JA Part VII-B Statements Regarding Activiti			22-68	21580	Page 6					
5 a During the year did the foundation pay or incur any amount to										
(1) Carry on propaganda, or otherwise attempt	-	n (section 4945(e))?	Yes X	No	, "					
(2) Influence the outcome of any specific pub on, directly or indirectly, any voter registra		4955), or to carry	Yes X	No	u -					
(3) Provide a grant to an individual for travel,	study, or other similar	purposes?	Yes X	No	, ,					
(4) Provide a grant to an organization other than in section 4945(d)(4)(A)? (see instructions		zation described	Yes X	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 X N										
b If any answer is 'Yes' to 5a(1)—(5), did any of described in Regulations section 53 4945 or in (see instructions)?	the transactions fail to a current notice regard	qualify under the excepting disaster assistance	ptions e	5 b	N/A					
Organizations relying on a current notice rega	rding disaster assistanc	ce check here	▶ [
c If the answer is 'Yes' to question 5a(4), does tax because it maintained expenditure respon If 'Yes,' attach the statement required by Regi	sibility for the grant?	·	N/A Yes] No						
6 a Did the foundation, during the year, receive an on a personal benefit contract?		,	∐Yes ∑]No						
b Did the foundation, during the year, pay prem If 'Yes' to 6b, file Form 8870	iums, directly or indirec	tly, on a personal bene	fit contract?	6 b	X					
7 a At any time during the tax year, was the found				No	.					
b If 'Yes,' did the foundation receive any proceed Part VIII Information About Officers, D	-			N/A 7b	1 1					
and Contractors		· ouridation mana	go.o,gy . a.a .							
1 List all officers, directors, trustees, foundation	n managers and their o	compensation (see inst	tructions).							
(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		se account, allowances					
DAVID B JACKSON	TRUSTEE	0.	0.		0					
THE MAILBOX 7998 (PO BOX 52388 MIAMI, FL 33152	0									
SUZANNE F. JACKSON 10 EUCLID AVENUE (#602) SUMMIT, NJ 07901	TRUSTEE 0	0.	0.		0					
DAVID B JACKSON, JR.	TRUSTEE 0	0.	0.		0					
LORI R. JACKSON	TRUSTEE	0.	0.		0					
LOKI K. JACKSON	0	0.	0.		Ŭ					
2 Compensation of five highest-paid employees (o	ther than those included	on line 1 – see instructio	ns). If none, enter 'NONE	<u> </u>						
(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		se account, allowances					
NONE										
				1						
	-									
Total number of other employees paid over \$50.00	0	<u> </u>		-						

•		
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Part VIII Information About Officers, Directors, Trustees, Foundation and Contractors (continued)		
3 Five highest-paid independent contractors for professional services (see instruction	ns). 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 informationganizations and other beneficiaries served, conferences convened, research papers produced, etc.	ion such as the number of	Expenses
1 DONATIONS TO 501(C)3 ORGANIZATIONS.		
	-	
		72,500.
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	r on lines 1 and 2	Amount
1 N/A		
2		
All other program-related investments See instructions		

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Total. Add lines 1 through 3

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

	1 a	1,467,052.
,		6,500.
		
,	1 d	1,473,552.
		1,410,552.
\\	2	0.
Subtract line 2 from line 1d	3	1,473,552.
Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	22,103.
Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	1,451,449.
Minimum investment return. Enter 5% of line 5	6	72,572.
Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private opera and certain foreign organizations check here ☐ and do not complete this part.)	ting f	oundations
Minimum investment return from Part X, line 6	1	72,572.
,		
b Income tax for 2016 (This does not include the tax from Part VI)		
c Add lines 2a and 2b	2 c	409.
Distributable amount before adjustments Subtract line 2c from line 1	3	72,163.
Recoveries of amounts treated as qualifying distributions	4	
Add lines 3 and 4	5	72,163.
Deduction from distributable amount (see instructions)	6	
Distributable amount as adjusted Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	72,163.
Cualifying Distributions (see Instructions)		
Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes a Expenses, contributions, gifts, etc. — total from Part I, column (d), line 26	1 a	72,500.
• • • • • • • • • • • • • • • • • • • •	1 b	
Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
Amounts set aside for specific charitable projects that satisfy the		
	3 a	
b Cash distribution test (attach the required schedule)	3 b	
Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	72,500.
Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income	5	
	\Box	72,500.
Augusted qualifying distributions, outside time of north time in	لت	,2,300.
	Acquisition indebtedness applicable to line 1 assets Subtract line 2 from line 1d Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions) Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4. Minimum investment return. Enter 5% of line 5. TIXI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private opera and certain foreign organizations check here. and do not complete this part.) Minimum investment return from Part X, line 6. Tax on investment income for 2016 from Part VI, line 5. Income tax for 2016. (This does not include the tax from Part VI) C Add lines 2a and 2b. Distributable amount before adjustments. Subtract line 2c from line 1. Recoveries of amounts treated as qualifying distributions. Add lines 3 and 4.	a Average monthly fair market value of securities b Average of monthly cash balances c Fair market value of all other assets (see instructions) d Total (add lines 1a, b, and c) e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) 1d (for greater amount, see instructions) 1d (for greater amount, see instructions) 1d (for greater amount file attach the fair fair fair fair fair fair fair fair

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

Form **990-PF** (2016)

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2015	(c) 2015	(d) 2016
Distributable amount for 2016 from Part XI, line 7	-			72,163.
2 Undistributed income, if any, as of the end of 2016				
a Enter amount for 2015 only			9,913.	}
b Total for prior years 20 , 20 , 20		0.		
3 Excess distributions carryover, if any, to 2016				
a From 2011				
b From 2012				1
c From 2013				
d From 2014				
e From 2015		,	!	
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2016 from Part				
XII, line 4 ► \$ 72,500.				
a Applied to 2015, but not more than line 2a			9,913.	
 Applied to undistributed income of prior years (Election required — see instructions) 		0.		
c Treated as distributions out of corpus				1
(Election required — see instructions)	0.			
d Applied to 2016 distributable amount				62,587.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2016	0.			0.
(If an amount appears in column (d), the same amount must be shown in column (a))				
Same amount must be shown in column (c)				ı
6 Enter the net total of each column as				
indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
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)				ĺ
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			0.	
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.				9,576.
7 Amounts treated as distributions out of				3,370.
corpus to satisfy requirements imposed by				
section 170(b)(1)(F) or 4942(g)(3) (Election may be required — see instructions)	0.			
•	<u> </u>			
8 Excess distributions carryover from 2011 not applied on line 5 or line 7 (see instructions)	0.			
9 Excess distributions carryover to 2017.	0.			ļ
Subtract lines 7 and 8 from line 6a 10 Analysis of line 9				
a Excess from 2012				
b Excess from 2013	1			
c Excess from 2014	1			
d Excess from 2015	1			
e Excess from 2016	1			
C LACOUS HOITI ZOTO	<u> </u>	1	1	Form 990-PF (2016)

Form 990-PF (2016) SUZANNE & DAVID & Part XIV Private Operating Foundat			VII.A guestion	22-6821580) Page 10
1 a If the foundation has received a ruling or dete	rmination letter that i				- N/A
is effective for 2016, enter the date of the b Check box to indicate whether the foundat	-	rating foundation d	escribed in section	4942(j)(3) or	4942(_l)(5)
2a Enter the lesser of the adjusted net	Tax year	<u> </u>	Prior 3 years		(e) Total
income from Part I or the minimum investment return from Part X for each year listed	(a) 2016	(b) 2015	(c) 2014	(d) 2013	(e) Total
b 85% of line 2a		-			
 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					
 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	15				
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					
 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					<u> </u>
Part XV Supplementary Information assets at any time during the	(Complete this e vear — see in	part only if the structions.)	foundation had	1 \$5,000 or more	in
1 Information Regarding Foundation Management			- .		
a tiet any managers of the foundation who hav	e contributed more th	an 2% of the total c	ontributions received	by the foundation bet	fore the
close of any tax year (but only if they have	e contributed more	tnan \$5,000) (See	section 507(d)(2))		
	· · · · · · · · · · · · · · · · · · ·				
b List any managers of the foundation who own a partnership or other entity) of which the NONE	10% or more of the foundation has a 1	stock of a corporation of greater inter	on (or an equally larg est	e portion of the owne.	rship of
2 Information Regarding Contribution, Grant,	Giff Loan Scholarch	nin etc Programs			
Check here ► ☐ if the foundation only market requests for funds. If the foundation makes g	kes contributions to	preselected charitab	ile organizations and viduals or organizatio	does not accept unsons under other condit	licited ions,
a The name, address, and telephone number of	r e-mail address of the	ne person to whom a	applications should be	e addressed	. <u> </u>
a The hame, address, and telephone hamser o	, o , , , , , , , , , , , , , , , , , ,				
SEE STATEMENT 4					
b The form in which applications should be	submitted and infor	mation and materi	als they should inclu	ude	
SEE STATEMENT FOR LINE 2A					
c Any submission deadlines					
SEE STATEMENT FOR LINE 2A					
d Any restrictions or limitations on awards,	such as by geograp	phical areas, charita	able fields, kinds of	institutions, or othe	r factors
SEE STATEMENT FOR LINE 2A					
BAA	TE	EA0310L 12/16/16			Form 990-PF (2016)

•:

3	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	Purpose of grant or contribution	Amount					
	Name and address (home or business)	or substantial contributor	recipient							
	Paid during the year									
SEE	STATEMENT 5									
		L			70 500					
	Total	1		► 3a	72,500.					
C	Approved for future payment									
				1						
			İ							
				,						
			1							
				1						
		1	1		1					
				1						
				1						
			1		,:					
				1						
		<u></u>	L	<u> </u>						
	Total			► 3t	<u> </u>					

Enter gros	s amounts unless otherwise indicated		business income	Excluded by	section 512, 513, or 514	(e)
	•	(a) Business code	(b) Amount	(c) Exclu- sion	(d) Amount	Related or exempt function income (See instructions)
1 Prog	ram service revenue			code		
a				 		
					·	
			·			
		 		-		
e		+ - +				
n Fees	and contracts from government agencies	+		 		
_	bership dues and assessments			+	·	
	st on savings and temporary cash investments					-
	lends and interest from securities			14	23,160.	
	ental income or (loss) from real estate			1 1 1	23,100.	
	-financed property					'
b Not o	debt-financed property					
6 Net re	intal income or (loss) from personal property					
7 Othe	r investment income					<u>-</u> .
8 Gain d	or (loss) from sales of assets other than inventory					12.
9 Net i	ncome or (loss) from special events					
10 Gros	s profit or (loss) from sales of inventory					
11 Othe	r revenue		۸.,			
a						•
b						
c						
d		<u> </u>		-		
e		- 				
	otal Add columns (b), (d), and (e)				23,160. 13	12.
	 Add line 12, columns (b), (d), and (e) sheet in line 13 instructions to verify calculate 	ions)			13	23,172.
	I-B Relationship of Activities to the		shment of Even	nt Purnos		
Line No.						ly to the
Elile No. ▼	Explain below how each activity for which i accomplishment of the foundation's exemp	t purposes (otl	ner than by providing	funds for su	ch purposes) (See	nstructions)
N/A						
		•	<u></u>			
						
		-				
	-				198	
						
				<u> </u>		
	-					-
				_		
			-		•	
			· · · · · · · · · · · · · · · · · · ·			-
			 			
		-				
 _		_				
		·				
						
						

Form 990-PF (2016) SUZANNE & DAVID JACKSON FOUNDATION 22-6821580 Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

descrit	e organization direct sed in section 501(c g to political organiz) of the Code (ot	ngage in any o her than section	f the following wi on 501(c)(3) organ	h any other organiza nizations) or in sectio	ition in 527,		Yes	No
a Transf	ers from the reporting	ng foundation to	a noncharitable	e exempt organiz	ation of				
(1) Ca	ish						1 a (1)		\overline{x}
(2) Ot	her assets						1 a (2)		X
b Other	transactions								
(1) Sa	ales of assets to a ne	oncharitable exei	mpt organizatio	on			1 b (1)		X
(2) Pu	irchases of assets fr	rom a noncharita	ble exempt org	janization			1 b (2)		X
(3) Re	ental of facilities, eq	uipment, or othei	r assets				1 b (3)		X
(4) Re	eimbursement arrang	gements					1 b (4)		X
(5) Lo	ans or loan guarant	ees					1 b (5)		X
(6) Pe	erformance of servic	es or membershi	ıp or fundraısın	g solicitations			1 b (6)		X
c Sharin	g of facilities, equip	ment, mailing lis	ts, other assets	s, or paid employ	ees		1 c		Х
d If the a	answer to any of the	e above is 'Yes,' services given by t	complete the fo the reporting fou now in column	ollowing schedule indation If the four	Column (b) should a dation received less the goods, other asset	always show the fai han fair market value ts, or services recei	r market val ın ved	ue of	
(a) Line no	(b) Amount involved		f noncharitable exe	i. ;	,	transfers, transactions, ar		ngement	is .
N/A	(b) ranount mioriou	(0)			(0)	, , , , , , , , , , , , , , , , , , , ,		· ·	
11/11	· · · · · · · · · · · · · · · · · · ·								
	.								
		-	100						
						·			
		-							
-							•		
	<u> </u>								
									
descri	foundation directly or bed in section 501 (c	c) of the Code (o	d with, or related ther than section	to, one or more to on 501(c)(3)) or in	ax-exempt organization section 527?	ns	Yes	X	No
	(a) Name of organiz		(b) Tyr	oe of organization	ı	(c) Description of r	elationship		
N/A		· · · · · · · · · · · · · · · · ·							
									
	_								
				,					
Unde	er penalties-of-perjury, I de	clare that I have exam	ined this return inc	luding accompanying s	chedules and statements, and which preparer has any k	nd to the best of my knowl	edge and belief,	it is true	e,
Sign Corre	cct, and complete Declara	fon of prepared (other	than taxpayer) is ba	ased on all information	TRUSTEE	12/18	May the this retuing preparer	IRS disc n with the shown	cuss he below
Sic	gnatule of officer or trustee			Date	Title		(see inst	Yes	No
	Print/Type preparer's	name	Preparer'	s signature	Date	Check	DTIN		
Doid	CHARLES F.	HEARD, JR			8/14/18		P0134	2793	
Paid	Firm's name	NOKE AND I		D	- 19/07/08		-1536289	, , ,	
Preparer		469 MORRIS		1. E <u>.</u>		7.11.13 CM ZZ-	1330203		
Use Only	i iiii s agaress	SUMMIT, NJ		83		Phone no 908	3-277-41	45	
BAA	<u> </u>	SOUMITT, NO	, 0//01 13				Form 99		(2016)
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FEDERAL STATEMENTS

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SUZANNE & DAVID JACKSON FOUNDATION

22-6821580

STATEMENT 1 FORM 990-PF, PART I, LINE 16B **ACCOUNTING FEES**

		(A) ENSES <u>BOOKS</u>	IN	(B) NET VESTMENT INCOME	AD. NET	(C) JUSTED <u>INCOME</u>	 (D) HARITABLE PURPOSES
ACCOUNTING FEES	TOTAL	\$ 2,205. 2,205.	\$ \$	2,205. 2,205.	\$ \$	2,205. 2,205.	\$ 0.

STATEMENT 2 FORM 990-PF, PART I, LINE 18 **TAXES**

		(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FEDERAL INCOME TAX FOREIGN TAX	\$ TOTAL \$	1,159. 495. 1,654.	\$ 495. \$ 495.	<u>\$ 0.</u>	<u>\$ 0.</u>	

STATEMENT 3 FORM 990-PF, PART III, LINE 3 OTHER INCREASES

NET UNREALIZED GAINS OR LOSSES ON INVESTMENTS

312,587. 312,587. TOTAL \$

STATEMENT 4 FORM 990-PF, PART XV, LINE 2A-D APPLICATION SUBMISSION INFORMATION

NAME OF GRANT PROGRAM:

N/A

NAME:

SUZANNE & DAVID JACKSON FOUNDATION

CARE OF:

DAVID JACKSON

STREET ADDRESS:

10 EUCLID AVENUE (#602)

CITY, STATE, ZIP CODE:

SUMMIT, NJ 07901 908-273-3675

TELEPHONE:

E-MAIL ADDRESS:

DAVIDBJACKSON916@GMAIL.COM

FORM AND CONTENT:

BRIEF LETTER EXPLAINING APPEAL NEED

SUBMISSION DEADLINES:

N/A

RESTRICTIONS ON AWARDS:

NONE

2016

FEDERAL STATEMENTS

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SUZANNE & DAVID JACKSON FOUNDATION

22-6821580

STATEMENT 5 FORM 990-PF, PART XV, LINE 3A RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE GRANT	OF <u>AMOUNT</u>
PAN-MASS CHALLENGE 77 FOURTH AVENUE NEEDHAM MA 02494	NONE	PUBLIC	GENERAL OPERATIONS	\$ 5,000
ALCHEIMERS ASSOC 225 NORTH MICHIGAN AVE CHICAGO IL 60601	NONE	PUBLIC	GENERAL OPERATION	1,000
ST BARTH MUSIC FESTIVAL 6847 JUNIATA PL PITTSBURG PA 15208	NONE	PUBLIC	GENERAL OPERATIONS	1,000
ST MARKS EPISCOPAL CHURCH 140 SOUTH FINLEY AVE BASKING RIDGE NJ 07920	NONE	PUBLIC	GENERAL OPERATIONS	10,000
HOUSING ASSISTANCE CORP 460 WEST MAIN ST HYANIS MA 02601	NONE	PUBLIC	GENERAL OPERATIONS	500
LEHIGH UNIVERSITY 27 MEMORIAL DRIVE BETHLEHEM PA 18015	NONE	PUBLIC	GENERAL OPERATIONS	55,000
				TOTAL \$ 72,500