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Form 990-PF

Department of the Treasury
Internal Revenue ServiceReturn of Private Foundation
or Section 4947(a)(1) Trust Treated as Private Foundation

OMB No 1545-0052

2017

Open to Public Inspection

Do not enter social security numbers on this form as it may be made public.
Go to www.irs.gov/Form990PF for instructions and the latest information.

For calendar year 2017 or tax year beginning

, and ending

Name of foundation

DR. RUDOLPH & MILDRED JOSEPH FOUNDATION

RUDO

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

14 Craven Lane

Room/suite

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

White Plains

NY

10605

Foreign country name

Foreign province/state/county

Foreign postal code

A Employer identification number

11-6110951

B Telephone number (see instructions)

(914) 949-2517

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 foundation

I Fair market value of all assets at

end of year (from Part II, col (c),

line 16) \$ 2,171,918

J Accounting method



Cash



Accrual

☐ Other (specify)

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

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 ☐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)

1 Contributions, gifts, grants, etc., received (attach schedule)

2 Check ☐ if the foundation is not required to attach Sch. B

3 Interest on savings and temporary cash investments

4 Dividends and interest from securities

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 613,871

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

8 Net short-term capital gain

9 Income modifications

10a Gross sales less returns and allowances

b Less Cost of goods sold

c Gross profit or (loss) (attach schedule)

11 Other income (attach schedule)

12 Total. Add lines 1 through 11

251,084

251,084

21,567

13 Compensation of officers, directors, trustees, etc

14 Other employee salaries and wages

15 Pension plans, employee benefits

16a Legal fees (attach schedule)

b Accounting fees (attach schedule)

c Other professional fees (attach schedule)

17 Interest

18 Taxes (attach schedule) (see instructions)

19 Depreciation (attach schedule) and depletion

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses (attach schedule)

24 Total operating and administrative expenses.

Add lines 13 through 23

32,642

32,642

32,642

0

25 Contributions, gifts, grants paid

214,069

214,069

26 Total expenses and disbursements. Add lines 24 and 25

246,711

32,642

32,642

214,069

27 Subtract line 26 from line 12

a Excess of revenue over expenses and disbursements

4,373

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

218,442

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

Form 990-PF (2017)

For Paperwork Reduction Act Notice, see instructions.

HTA

SCANNED AUG 06 2018

Revenue
Operating and Administrative ExpensesRECEIVED
JUN 25 2018
OGDEN, UTRECEIVED
JUN 25 2018
OGDEN, UT

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				72,674	75,225	75,225
	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 (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)				1,085,541	1,101,554	2,096,693
	c	Investments—corporate bonds (attach schedule)						
Liabilities	11	Investments—land, buildings, and equipment basis ▶						
		Less: accumulated depreciation (attach schedule) ▶						
	12	Investments—mortgage loans						
	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)				1,158,215	1,176,779	2,171,918
	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 (attach schedule)						
	22	Other liabilities (describe ▶)						
	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.						
		Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.						
Net Assets or Fund Balances	24	Unrestricted						
	25	Temporarily restricted						
	26	Permanently restricted						
	27	Capital stock, trust principal, or current funds						
	28	Paid-in or capital surplus, or land, bldg, and equipment fund						
	29	Retained earnings, accumulated income, endowment, or other funds				1,158,215	1,176,779	
	30	Total net assets or fund balances (see instructions)				1,158,215	1,176,779	
Net Assets or Fund Balances	31	Total liabilities and net assets/fund balances (see instructions)				1,158,215	1,176,779	

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	1,158,215
2	Enter amount from Part I, line 27a	2	4,373
3	Other increases not included in line 2 (itemize) ▶ refunds	3	14,191
4	Add lines 1, 2, and 3	4	1,176,779
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	1,176,779

Part IV Capital Gains and Losses for Tax on Investment Income

a) List and describe the kind(s) of property sold (for example, 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	Morgan Stanley	P	various	various
b	Morgan Stanley	P	various	various
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 90,557		104,062	-13,505
b 523,314		280,292	243,022
c			
d			
e			

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			-13,505
b			243,022
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	229,517
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	0

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 doesn't 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))
2016	297,415	1,811,083	0.164219
2015	211,200	1,955,590	0.107998
2014	0	0	0.000000
2013	0	0	0.000000
2012	0	0	0.000000

2	Total of line 1, column (d)	2	0.272217
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years	3	0.054443
4	Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	4	
5	Multiply line 4 by line 3	5	
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	2,184
7	Add lines 5 and 6	7	2,184
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	214,069

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 ☐ 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 ☒ and enter 1% of Part I, line 27b	1	2,184	
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	2,184	
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)	4		
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	2,184	
6	Credits/Payments:			
a	2017 estimated tax payments and 2016 overpayment credited to 2017	6a	4,000	
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	4,000	
8	Enter any penalty for underpayment of estimated tax. Check here ☐ 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	0	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	1,816	
11	Enter the amount of line 10 to be. Credited to 2018 estimated tax ☒ 1,816 Refunded ☐	11	0	

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?		
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the 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.		
c Did the foundation file Form 1120-POL for this year?		
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ \$ (2) On foundation managers. ▶ \$		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		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?	N/A	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		
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?		
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. ▶ NY		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation		
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2017 or the tax year beginning in 2017? See the 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

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.	Yes	No
11			X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions.		X
12			X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	X	
13		X	
Website address ▶			
14	The books are in care of ▶ Jane Eger	Telephone no. ▶ (914) 949-2517	
14	Located at ▶ 14 Craven Lane White Plains NY	ZIP+4 ▶ 10605	
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—check here and enter the amount of tax-exempt interest received or accrued during the year ▶ 15		
16	At any time during calendar year 2017, 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 ▶	Yes	No
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.

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?	☐ Yes	☒ No
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes	☒ No
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes	☒ No
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes	☒ 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)?	☐ Yes	☒ 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.)	☐ Yes	☒ 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 2017?	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 2017, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2017? If "Yes," list the years ▶ 20____, 20____, 20____, 20____	☐ Yes	☒ No
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions.)	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. ▶ 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?	☐ Yes	☒ No
b	If "Yes," did it have excess business holdings in 2017 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 2017.)	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 2017?	4b	X

Part VII-B. Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year, did the foundation pay or incur any amount to:(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ 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 **5b** N/AOrganizations 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? ☐ 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**

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? **7b****Part VIII. Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors****1** List all officers, directors, trustees, and foundation managers and their compensation. See instructions.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Jane Eger 14 Craven Lane White Plains, NY 10605	Trustee 5 00	0		
Peter Joseph 53 Summit Road San Anselmo, CA 94960	Trustee 5 00	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	(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 **▶**

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3 Five highest-paid independent contractors for professional services. See instructions. If none, enter "NONE."**

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

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 N/A	
2	
3	
4	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
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	0
b	Average of monthly cash balances	1b	0
c	Fair market value of all other assets (see instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	0
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	
4	Cash deemed held for charitable activities. Enter 1½ % of line 3 (for greater amount, see instructions)	4	
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	0
6	Minimum investment return. Enter 5% of line 5	6	0

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	
2a	Tax on investment income for 2017 from Part VI, line 5	2a	2,184
b	Income tax for 2017. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	2,184
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	-2,184
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	-2,184
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	-2,184

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	214,069
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	214,069
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	2,184
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	211,885

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 2016	(c) 2016	(d) 2017
1 Distributable amount for 2017 from Part XI, line 7				-2,184
2 Undistributed income, if any, as of the end of 2017			0	
a Enter amount for 2016 only				
b Total for prior years: 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2017:				
a From 2012				
b From 2013				
c From 2014				
d From 2015				212,444
e From 2016				210,739
f Total of lines 3a through e	423,183			
4 Qualifying distributions for 2017 from Part XII, line 4: ► \$ 214,069				
a Applied to 2016, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions)				
c Treated as distributions out of corpus (Election required—see instructions)				
d Applied to 2017 distributable amount				
e Remaining amount distributed out of corpus	214,069			
5 Excess distributions carryover applied to 2017. (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	637,252			
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				
d Subtract line 6c from line 6b Taxable amount—see instructions				
e Undistributed income for 2016 Subtract line 4a from line 2a. Taxable amount—see instructions				0
f Undistributed income for 2017 Subtract lines 4d and 5 from line 1. This amount must be distributed in 2018				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required—see instructions)				
8 Excess distributions carryover from 2012 not applied on line 5 or line 7 (see instructions)	2,184			
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a	635,068			
10 Analysis of line 9				
a Excess from 2013				
b Excess from 2014				
c Excess from 2015				212,444
d Excess from 2016				210,739
e Excess from 2017				214,069

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

N/A

- 1a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2017, enter the date of the ruling

☐ 4942(j)(3) or ☒ 4942(j)(5)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year SEE ATTACHED		PC		214,069
Total			▶ 3a	214,069
b Approved for future payment				
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					
4	Dividends and interest from securities					21,567
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					229,517
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		0	251,084
13	Total. Add line 12, columns (b), (d), and (e)					251,084

(See worksheet in line 13 instructions to verify calculations)

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

[illegible]

Part XVII Information Regarding Transfers to and Transactions and Relationships With Noncharitable Exempt Organizations

- | | | |
|----------|--|-----------|
| 1 | Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? | |
| a | Transfers from the reporting foundation to a noncharitable exempt organization of | |
| | (1) Cash | 1a |
| | (2) Other assets | 1a |
| b | Other transactions | |
| | (1) Sales of assets to a noncharitable exempt organization | 1b |
| | (2) Purchases of assets from a noncharitable exempt organization | 1b |
| | (3) Rental of facilities, equipment, or other assets | 1b |
| | (4) Reimbursement arrangements | 1b |
| | (5) Loans or loan guarantees | 1b |
| | (6) Performance of services or membership or fundraising solicitations | 1b |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees | 1b |
| d | If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. | 1 |

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

[illegible]

- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (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

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true and correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

**Sign
Here**

Signature of officer or trustee James E. Grew

15/1/88

May the IRS discuss this return with the preparer shown below?
See instructions ☒ Yes ☐ No

Paid Preparer Use Only	Pnnr/Type preparer's name <i>Chad YEGELWEI</i>	Preparer's signature <i>[Signature]</i>	Date <i>4-27-18</i>	Check ☐ if self-employed	PTIN <i>P01795323</i>
	Firm's name ▶	Firm's EIN ▶			
	Firm's address ▶	Phone no ▶			

SAKOFISKY & YEGELWEL, P.C.
Attorneys at Law
100 N. Centre Avenue
Rockville Centre, N.Y. 11570

Part I, Line 16c (990-PF) - Other Professional Fees

		19,815	19,815	19,815	0
Description		Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes (Cash Basis Only)
1	Investment advice	19,815	19,815	19,815	0

Part I, Line 18 (990-PF) - Taxes

		4,827	4,827	4,827	0
Description		Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
1	Federal	4,083	4,083	4,083	
2	New York	250	250	250	
3	Foreign Taxes	494	494	494	

PART XV - 3(a) - GRANTS and
CONTRIBUTIONS

Activity Date	Description	Amount(\$)
12/28/2017	OIL CHANGE INTERNATION 2025189029 DC	-500 00
12/27/2017	UNION OF CONCERNED SCIENTISTS Check # 3628	-300.00
12/26/2017	ALZHEIMERS ASSN Check # 3600	-200.00
12/26/2017	BB *MARINE MAMMAL CTR SAUSALITO CA	-500 00
12/26/2017	DEMOCRACY NOW! PRODUCT 02124319090 NY	-500 00
12/26/2017	KALW-FM 4158414121 CA	-600 00
12/21/2017	WPY*MINDS MATTER OF NY 855-469-3729 CA	-521 77
12/20/2017	PARTNERS IN HEALTH 8578805600 MA	-1,038 10
12/19/2017	NRDC 2127274600 NY	-1,000 00
12/18/2017	NISKANENCENTER ORG 2025563942 DC	-1,000 00
12/18/2017	NETWORK FOR GOOD 888-284-7978 DC	-2,000 00
12/13/2017	SAVE THE REDWOODS LEAG 04153622352 CA	-1,000 00
12/11/2017	READER SUPPORTED NEWS, 7602305576 CA	-25 00
12/08/2017	U OF M CANCER CTR Check # 3602	-250 00
12/08/2017	THE NATURE CONSERVANCY Check # 3598	-500.00
12/08/2017	KQED MEMBERSHIP 415-5532150 CA	-252 00
12/07/2017	ENVIRONMENT AMERICAN RESEARCH Check # 3591	-5,000 00
12/06/2017	WHITE PLAINS HOSPITAL Check # 3601	-2,000 00
12/06/2017	KZYX 7078952324 CA	-360 00
12/05/2017	SUSAN LOVE RESEARCH CTR Check # 3599	-5,000 00
12/05/2017	CITIZENS CLIMATE EDUCATION Check # 0092	-10,000 00
12/04/2017	CCL EDU 501C3 6194377142 CA	-100 00
11/30/2017	BREAST CANCER RESEARCH FOUNDAT Check # 3596	-1,000 00
11/30/2017	DEMOCRACY NOW! PRODUCT 02124319090 NY	-1,000 00
11/29/2017	CLIMATE REALITY PROJECT Check # 3597	-500 00
11/29/2017	WIKIMEDIA8776009454 877-6009454 CA	-100 00
11/29/2017	PEER 02022657337 MD	-1,000 00
11/29/2017	PAYPAL *OURCLIMATEEE 4029357733 CA	-500 00
11/28/2017	ALZHEIMERS ASSN Check # 3595	-250 00
11/28/2017	ST JUDE Check # 3594	-300 00
11/27/2017	UGANDAN CHILDREN OF CONFLICT Check # 3592	-500 00
11/27/2017	INSIDECLIMATE NEWS 7186244587 NY	-1,000 00
11/21/2017	CCL EDU 501C3 6164377142 CA	-80 00
11/20/2017	COLUMBIA ONLINE GIFT NEW YORK NY	-250.00
11/09/2017	READER SUPPORTED NEWS, 7602305576 CA	-25 00
11/02/2017	CCL EDU 501C3 6194377142 CA	-100 00
11/01/2017	PARKINSONS DISEASE FOUNDATION Check # 3590	-10,000 00

10/30/2017	REDWOOD COMM FUND 7075765301 CA	-2,000 00
10/26/2017	ONE HUNDRED FRIENDS Check # 3434	-5,000.00
10/20/2017	COLUMBIA ONLINE GIFT NEW YORK NY	-2,500 00
10/09/2017	READER SUPPORTED NEWS, 7602305576 CA	-25 00
10/02/2017	CCL EDU 501C3 6194377142 CA	-100 00
10/02/2017	PAYPAL *FCTNETINC 4029357733 CA	-250.00
09/25/2017	INT RESCUE COMM-THANKS NEW YORK NY	-500 00
09/12/2017	AMERICAN CIVIL LIBERTI 218-5492500 NY	-1,000 00
09/12/2017	QGV*WILD FOUNDATION 303-4403432 CO	-1,000 00
09/11/2017	READER SUPPORTED NEWS, 7602305576 CA	-25 00
09/05/2017	LACUONA FOR MAYER Check # 3588	-1,000 00
08/28/2017	KDFC CLASSICAL 888-966-5454 CA	-150 00
08/24/2017	BB *NAT'L MS SOCIETY NEW YORK NY	-100 00
08/10/2017	LEAGUE OF CONSERVATION VOTERS Check # 3433	-15,000 00
08/09/2017	READER SUPPORTED NEWS, 7602305576 CA	-25 00
08/02/2017	CCL EDU 501C3 6194377142 CA	-100 00
07/31/2017	CCL EDU 501C3 6194377142 CA	-2,000 00
07/26/2017	US TREAS IRS Check # 3587	-164.24
07/19/2017	AMERICAN CIVIL LIBERTI 212-5492500 NY	-1,000 00
07/19/2017	PAYPAL *BALDWINFOUN 4029357733 CA	-100 00
07/18/2017	AS YOU SOW 00 OF 00 510-7358158 CA	-1,000 00
07/18/2017	PAYPAL *BALDWINFOUN 4029357733 CA	-25 00
07/17/2017	BB *EARTHJUSTICE SAN FRANCIS CA	-1,000 00
07/14/2017	COLUMBIA UNIV MED CTR Check # 3586	-250 00
07/10/2017	READER SUPPORTED NEWS, 7602305576 CA	-25.00
07/06/2017	MIDWEST VALUES Check # 3584	-500 00
07/06/2017	THE NATURE CONSERVANCY Check # 3583	-250 00
07/03/2017	LEAGUE OF CONSERVATION VOTERS Check # 3585	-500 00
07/03/2017	CCL EDU 501C3 6194377142 CA	-100.00
06/29/2017	NEWSDAY Check # 3582	-60.00
06/28/2017	BB *CONSERVATION INTER ARLINGTON VA	-1,000 00
06/26/2017	UGANDAN CHILDREN OF CONFLICT F Check # 3581	-500 00
06/26/2017	RAINFOREST ACTION NETW 415-398-4404 CA	-1,000.00
06/21/2017	LEAGUE OF CONSERVATION VOTERS Check # 3580	-1,050.00
06/13/2017	NEWSDAY Check # 3579	-60 00
06/06/2017	CITZENS CLIMATE EDUCATION	-100,000 00
06/09/2017	READER SUPPORTED NEWS, 7602305576 CA	-25.00
06/07/2017	KZYX 7078952324 CA	-250 00
06/02/2017	CCL EDU 501C3 6194377142 CA	-100 00
06/01/2017	COMMONWEALTH CLUB 08889555455 CA	-250 00
05/30/2017	COLUMBIA ONLINE GIFT NEW YORK NY	-1,000.00
05/30/2017	PAYPAL *EARTHINSIGH 4029357733 CA	-2,000 00

05/18/2017	PUBLIC CITIZEN 800-2893787 DC	-250.00
05/17/2017	CCL EDU 501C3 6194377142 CA	-179.00
05/15/2017	CALIFORNIA ACADEMY OF 415-379-8000 CA	-249 00
05/15/2017	BB *EARTH ISLAND INST BERKELEY CA	-500 00
05/15/2017	THE WILDERNESS SOCIETY 08008439453 DC	-500 00
05/15/2017	KQED MEMBERSHIP 415-5532150 CA	-360.00
05/11/2017	DEMOCRACY NOW! PRODUCT 02124319090 NY	-250 00
05/09/2017	READER SUPPORTED NEWS, 7602305576 CA	-25 00
05/02/2017	CCL EDU 501C3 6194377142 CA	-100.00
05/01/2017	KALW-FM 4158414121 CA	-250 00
04/27/2017	IPPNW ORG 617-4401733 MA	-500 00
04/10/2017	READER SUPPORTED NEWS, 7602305576 CA	-25 00
04/03/2017	CCL EDU 501C3 6194377142 CA	-100 00
03/31/2017	OXFAM 800-776-9326 800-7769326 MA	-500 00
03/31/2017	COLUMBIA ONLINE GIFT NEW YORK NY	-500 00
03/29/2017	OUR CHILDRENS TRUST 5413750158 OR	-250 00
03/28/2017	WOMEN'S EARTH & CLIMAT MILL VALLEY CA	-2,500 00
03/27/2017	RAINFOREST ACTION NETW 415-398-4404 CA	-250.00
03/17/2017	NFG*YEARS OF LIVING DA 08882847978 DC	-1,000 00
03/13/2017	ACTBLUE*JAREDHUFFMAN ACTBLUECC.COM MA	-100 00
03/13/2017	ACTBLUE*JAREDHUFFMAN ACTBLUECC.COM MA	-250.00
03/13/2017	BB *HOPEWW WAYNE PA	-2,500.00
03/09/2017	READER SUPPORTED NEWS, 7602305576 CA	-25 00
03/08/2017	US HOLOCAUST MUSEUM 8669987466 DC	-250 00
03/07/2017	ACTBLUE*COURAGE CAMPA ACTBLUECC COM MA	-100.00
03/06/2017	ACTBLUE*CLIMATETRUTH ACTBLUECC COM MA	-250.00
03/03/2017	CCL EDU 501C3 6194377142 CA	-100 00
02/28/2017	ACTBLUE*314 ACTION ACTBLUECC.COM MA	-100 00
02/24/2017	CLIMATE SCI DEFENSE 6468010853 NY	-1,000.00
02/24/2017	KDFC CLASSICAL 888-966-5454 CA	-120 00
02/21/2017	OXFAM 800-776-9326 800-7769326 MA	-1,000 00
02/10/2017	INT RESCUE COMM-THANKS NEW YORK NY	-500 00
02/09/2017	READER SUPPORTED NEWS, 7602305576 CA	-25 00
02/02/2017	EARTHJUSTICE 800-5846460 CA	-250.00
02/02/2017	CCL EDU 501C3 6194377142 CA	-100 00
01/31/2017	ENV FORUM OF MARIN 4153312131 CA	-250 00
01/30/2017	ACTBLUE*314.ACTION ACTBLUECC.COM MA	-250 00
01/30/2017	AMERICAN CIVIL LIBERTI 218-5492500 NY	-1,000.00
01/30/2017	COLUMBIA ONLINE GIFT NEW YORK NY	-2,500 00
01/30/2017	MOTHER JONES MAGAZINE 04153211700 CA	-500 00
01/18/2017	COMMONWEALTH CLUB 08889555455 CA	-500 00
01/09/2017	ST JUDE CHILDRENS HOSP Check # 3577	-500 00

01/09/2017	READER SUPPORTED NEWS, 7602305576 CA	-25 00
01/04/2017	HU DEVELOPMENT WEB 05164635116 NY	-1,000.00
01/03/2017	CCL EDU 501C3 6194377142 CA	-100 00
01/03/2017	HONOR THE EARTH 02185733448 MN	-250 00
Total		-214,069 11