

2017

Form 990-PF

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

OMB No 1545-0052

2017

Department of the Treasury
Internal Revenue Service

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.

Open to Public Inspection

For calendar year 2017 or tax year beginning , and ending

Name of foundation: **WILLIAM E. SIMON FOUNDATION INC.**

Employer identification number: **13-6217788**

Number and street (or P O box number if mail is not delivered to street address): **140 EAST 45TH STREET**

Room/suite: **14D**

Telephone number: **212-661-8366**

City or town, state or province, country, and ZIP or foreign postal code: **NEW YORK, NY 10017**

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): **\$ 56,645,850.** (Part I, column (d) must be on cash basis.)

J Accounting method: Cash Accrual Other (specify)

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		(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				N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B					
3 Interest on savings and temporary cash investments		45,804.	45,804.		
4 Dividends and interest from securities		864,620.	790,751.		
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		4,820,331.			
b Gross sales price for all assets on line 6a		11,899,854.			
7 Capital gain net income (from Part IV, line 2)			4,809,860.		
8 Net short-term capital gain					
9 Income modifications					
10a Gross sales less returns and allowances					
b Less Cost of goods sold					
c Gross profit or (loss)					
11 Other income		548,029.	548,029.		Statement 1
12 Total Add lines 1 through 11		6,278,784.	6,194,444.		
13 Compensation of officers, directors, trustees, etc		243,253.	0.		243,253.
14 Other employee salaries and wages		509,783.	0.		509,783.
15 Pension plans, employee benefits		211,138.	0.		209,896.
16a Legal fees					
b Accounting fees Stmt 2		16,500.	8,250.		0.
c Other professional fees Stmt 3		995,009.	360,009.		635,000.
17 Interest		51,979.	51,979.		0.
18 Taxes Stmt 4		143,666.	34,967.		1,500.
19 Depreciation and depletion					
20 Occupancy		270,004.	0.		254,631.
21 Travel, conferences, and meetings		58,263.	0.		53,482.
22 Printing and publications		2,377.	0.		2,377.
23 Other expenses Stmt 5		505,262.	404,231.		101,446.
24 Total operating and administrative expenses Add lines 13 through 23		3,007,234.	859,436.		2,011,368.
25 Contributions, gifts, grants paid		7,420,492.			8,571,863.
26 Total expenses and disbursements. Add lines 24 and 25		10,427,726.	859,436.		10,583,231.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		<4,148,942.>			
b Net investment income (if negative, enter -0-)			5,335,008.		
c Adjusted net income (if negative, enter -0-)				N/A	

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Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only		Beginning of year	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		2,988,725.	4,296,081.	4,296,081.
	3	Accounts receivable ▶ 496.				
		Less: allowance for doubtful accounts ▶			496.	496.
	4	Pledges receivable ▶				
		Less: allowance for doubtful accounts ▶				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons				
	7	Other notes and loans receivable ▶				
		Less: allowance for doubtful accounts ▶				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges		15,861.	8,998.	8,998.
	10a	Investments - U.S. and state government obligations				
	b	Investments - corporate stock Stmt 6		14,362,669.	13,935,507.	13,935,507.
	c	Investments - corporate bonds				
	11	Investments - land, buildings, and equipment basis ▶				
	Less: accumulated depreciation ▶					
12	Investments - mortgage loans					
13	Investments - other Stmt 7		40,987,349.	38,279,901.	38,279,901.	
14	Land, buildings, and equipment: basis ▶					
	Less: accumulated depreciation ▶					
15	Other assets (describe ▶ Statement 8)		160,316.	124,867.	124,867.	
16	Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		58,514,920.	56,645,850.	56,645,850.	
Liabilities	17	Accounts payable and accrued expenses		6,662.	27,500.	
	18	Grants payable		3,628,056.	2,486,936.	
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons				
	21	Mortgages and other notes payable				
	22	Other liabilities (describe ▶ Statement 9)		103,820.	236,993.	
23	Total liabilities (add lines 17 through 22)		3,738,538.	2,751,429.		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>					
	and complete lines 24 through 26, and lines 30 and 31					
	24	Unrestricted		54,776,382.	53,894,421.	
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/>					
	and complete lines 27 through 31					
	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					
30	Total net assets or fund balances		54,776,382.	53,894,421.		
31	Total liabilities and net assets/fund balances		58,514,920.	56,645,850.		

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	54,776,382.
2	Enter amount from Part I, line 27a	2	<4,148,942.>
3	Other increases not included in line 2 (itemize) ▶ CHANGE IN UNREALIZED APPRECIATION	3	3,266,981.
4	Add lines 1, 2, and 3	4	53,894,421.
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	53,894,421.

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 PUBLICLY TRADED SECURITIES	P	Various	Various
b PARTNERSHIPS & OTHER INVESTMENTS	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 8,967,587.		6,963,298.	2,004,289.
b 2,932,267.		126,696.	2,805,571.
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.			(l) Gains (Col. (h) gain minus col (k), but not less than -0-) or Losses (from col. (h))
(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	
a			2,004,289.
b			2,805,571.
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	4,809,860.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8		3	N/A

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? Yes No
 If "Yes," the foundation 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	11,587,779.	60,523,324.	.191460
2015	13,081,025.	69,308,976.	.188735
2014	13,614,066.	70,759,513.	.192399
2013	13,234,055.	67,679,976.	.195539
2012	12,989,017.	63,131,452.	.205746

2 Total of line 1, column (d)	2	.973879
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	.194776
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	4	56,921,566.
5 Multiply line 4 by line 3	5	11,086,955.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	53,350.
7 Add lines 5 and 6	7	11,140,305.
8 Enter qualifying distributions from Part XII, line 4	8	10,583,231.

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	106,700.
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	106,700.
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	106,700.
6	Credits/Payments:		
6a	2017 estimated tax payments and 2016 overpayment credited to 2017	6a	40,000.
6b	Exempt foreign organizations - tax withheld at source	6b	0.
6c	Tax paid with application for extension of time to file (Form 8868)	6c	95,000.
6d	Backup withholding erroneously withheld	6d	0.
7	Total credits and payments. Add lines 6a through 6d	7	135,000.
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	0.
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	28,300.
11	Enter the amount of line 10 to be: Credited to 2018 estimated tax <input type="checkbox"/> 28,300. <input checked="" type="checkbox"/> Refunded <input type="checkbox"/>	11	0.

Part VII-A Statements Regarding Activities

	Yes	No
1a		X
1b		X
1c		X
2		X
3		X
4a	X	
4b	X	
5		X
6	X	
7	X	
8a	Enter the states to which the foundation reports or with which it is registered. See instructions. <input type="checkbox"/> <u>NY, NJ</u>	
8b	X	
9		X
10		X

Part VII-A Statements Regarding Activities (continued)

	Yes	No
11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions	X	
See Statement 10		
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ <u>www.wesimonfoundation.org</u>	X	
14 The books are in care of ▶ <u>MASSEY QUICK SIMON & CO., LLC</u> Telephone no. ▶ <u>973-898-0290</u> Located at ▶ <u>310 SOUTH STREET, MORRISTOWN, NJ</u> ZIP+4 ▶ <u>07962-1913</u>		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here and enter the amount of tax-exempt interest received or accrued during the year	N/A	
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 ▶		X

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

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

	Yes	No
1a During the year, did the foundation (either directly or indirectly):		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions Organizations relying on a current notice regarding disaster assistance, check here		X
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?		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 ▶ _____, _____, _____	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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.)	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. ▶ _____, _____, _____, _____	N/A	
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 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.)	N/A	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		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?		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:		Yes	No
(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 Organizations relying on a current notice regarding disaster assistance, check here	N/A ▶ <input type="checkbox"/>	5b	
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? If "Yes," attach the statement required by Regulations section 53.4945-5(d).	N/A <input type="checkbox"/> Yes <input type="checkbox"/> No		
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? If "Yes" to 6b, file Form 8870.		6b	X
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?	N/A	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.

(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
SEE STATEMENT 13-1				

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

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 13-2				

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. If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NEW VERNON ADVISORS, INC. 310 SOUTH STREET, PO BOX 1913, MORRISTOWN, NJ	STAFF & OVERHEAD FEES	597,000.
NEW VERNON ADVISORS, INC. 310 SOUTH STREET, PO BOX 1913, MORRISTOWN, NJ	ACCTG. & INVESTMENT ADVISORY FEES	167,412.

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 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
	0.
2	
All other program-related investments. See instructions.	
3 N/A	
	0.
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	55,031,810.
b	Average of monthly cash balances	1b	2,622,221.
c	Fair market value of all other assets	1c	134,361.
d	Total (add lines 1a, b, and c)	1d	57,788,392.
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	57,788,392.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	866,826.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	56,921,566.
6	Minimum investment return. Enter 5% of line 5	6	2,846,078.

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	2,846,078.
2a	Tax on investment income for 2017 from Part VI, line 5	2a	106,700.
b	Income tax for 2017. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	106,700.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	2,739,378.
4	Recoveries of amounts treated as qualifying distributions	4	10,250.
5	Add lines 3 and 4	5	2,749,628.
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	2,749,628.

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	10,583,231.
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	10,583,231.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	0.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	10,583,231.

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				2,749,628.
2 Undistributed income, if any, as of the end of 2017				
a Enter amount for 2016 only			0.	
b Total for prior years:		0.		
3 Excess distributions carryover, if any, to 2017:				
a From 2012	9,923,488.			
b From 2013	9,923,782.			
c From 2014	10,195,014.			
d From 2015	9,733,824.			
e From 2016	8,628,569.			
f Total of lines 3a through e	48,404,677.			
4 Qualifying distributions for 2017 from Part XII, line 4: ▶ \$ 10,583,231.				
a Applied to 2016, 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 2017 distributable amount				2,749,628.
e Remaining amount distributed out of corpus	7,833,603.			
5 Excess distributions carryover applied to 2017 (If an amount appears in column (d), the same amount must be shown in column (a))	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	56,238,280.			
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 2016. Subtract line 4a from line 2a Taxable amount - see instr.			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)	0.			
8 Excess distributions carryover from 2012 not applied on line 5 or line 7	9,923,488.			
9 Excess distributions carryover to 2018 Subtract lines 7 and 8 from line 6a	46,314,792.			
10 Analysis of line 9.				
a Excess from 2013	9,923,782.			
b Excess from 2014	10,195,014.			
c Excess from 2015	9,733,824.			
d Excess from 2016	8,628,569.			
e Excess from 2017	7,833,603.			

Form 990-PF	Other Income	Statement	1
Description	(a) Revenue Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income
MISCELLANEOUS INCOME	548,029.	548,029.	
Total to Form 990-PF, Part I, line 11	548,029.	548,029.	

Form 990-PF	Accounting Fees			Statement 2
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
OWEN J. FLANAGAN & COMPANY	16,500.	8,250.		0.
To Form 990-PF, Pg 1, ln 16b	16,500.	8,250.		0.

Form 990-PF	Other Professional Fees			Statement 3
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
ACCOUNTING & INVESTMENT				
ADVISORY FEES	167,412.	167,412.		0.
STAFF & OVERHEAD FEES	597,000.	0.		597,000.
CONSULTANT FEES	38,000.	0.		38,000.
CUSTODY/MGMT FEES -				
GOLDMAN SACHS - DELAWARE	31,542.	31,542.		0.
CUSTODY/MGMT FEES -				
GOLDMAN SACHS - EAGLE	72,588.	72,588.		0.
CUSTODY/MGMT FEES -				
GOLDMAN SACHS - HARRIS	73,762.	73,762.		0.
ASSOC.				
CUSTODY/MGMT FEES - US	14,705.	14,705.		0.
TRUST COMPANY				
To Form 990-PF, Pg 1, ln 16c	995,009.	360,009.		635,000.

Form 990-PF	Taxes			Statement 4
Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
EXCISE TAXES	106,949.	0.		0.
NEW YORK FILING FEE	1,500.	0.		1,500.
FOREIGN TAXES	34,967.	34,967.		0.
UNRELATED BUSINESS INCOME TAXES	250.	0.		0.
To Form 990-PF, Pg 1, ln 18	143,666.	34,967.		1,500.

Form 990-PF

Other Expenses

Statement 5

Description	(a) Expenses Per Books	(b) Net Invest- ment Income	(c) Adjusted Net Income	(d) Charitable Purposes
MISCELLANEOUS EXPENSE	66,716.	0.		78,374.
MEALS	10,792.	0.		9,940.
POSTAGE & DELIVERY	3,083.	0.		3,251.
PORTFOLIO DEDUCTIONS	381,479.	371,699.		0.
INSURANCE	10,660.	0.		9,881.
BANK FEES	375.	375.		0.
OTHER INVESTMENT EXPENSES	32,157.	32,157.		0.
To Form 990-PF, Pg 1, ln 23	505,262.	404,231.		101,446.

WILLIAM E. SIMON FOUNDATION
INVESTMENTS - SECURITIES
PAGE 2, COLUMN (b) - LINE 10b
DECEMBER 31, 2017

MONEY MANAGERS:

CORPORATE STOCK (LINE 10b)

BERKSHIRE HATHAWAY - A	4,464,000
GOLDMAN SACHS - DELAWARE LCG	1,558,308
GOLDMAN SACHS - EAGLE DYNAMIC EQUITY	4,121,297
GOLDMAN SACHS - HARRIS ASSOCIATES: DYNAMIC EQ	3,791,902

	13,935,507
	=====

WILLIAM E SIMON FOUNDATION
 INVESTMENTS - SECURITIES
 PAGE 2, COLUMN (b) - LINE 13
 DECEMBER 31, 2017

OTHER INVESTMENTS (LINE 13)

DREYFUS STRATEGIC GLOBAL FUND (EQUITY MUTUAL FUND)	4,194,363
GS LOCAL EMERGING MKTS DEBT FD (FIXED INCOME MUTUAL FUND)	2,999,564
VANGUARD ST CORP FUND (FIXED INCOME MUTUAL FUND)	169,166
UBS 13D ACTIVIST FUND (EQUITY MUTUAL FUND)	1,254,017
ARTISAN DYNAMIC EQUITY (GLOBAL EQUITY) LLC (EQUITY MUTUAL FUND)	5,020,327
ELLIOTT INTERNATIONAL LIMITED (HEDGE FUND)	3,076,621
FIA TIMBER PARTNERS, LP (REAL ESTATE PTRSHP)	2,208,776
FIA TIMBER PARTNERS II, LP (REAL ESTATE PTRSHP)	141,415
OCM OPPORTUNITIES FUND VI (DISTRESSED DEBT PTRSHP)	45
OCM OPPORTUNITIES FUND VI AIF (DELAWARE) (DISTRESSED DEBT PTRSHP)	7
OCM OPPORTUNITIES FUND VI AIF (CAYMAN) (DISTRESSED DEBT PTRSHP)	3
SINO FINANCE GROUP, LLC (INVESTMENT PTRSHP)	1,917,721
SOUTH STREET CAPITAL, LP (INVESTMENT PTRSHP)	12,903,682
SOUTH STREET CAPITAL II, LLC (INVESTMENT PTRSHP)	4,314,893
SOWOOD ALPHA FUND, LP (HEDGE FUND)	12,731
WESLY CREEK, LLC (INVESTMENT PTRSHP)	66,570

	38,279,901
	=====

Form 990-PF	Other Assets		Statement	8
Description	Beginning of Yr Book Value	End of Year Book Value	Fair Market Value	
SECURITY DEPOSIT	61,816.	61,816.	61,816.	
FEDERAL EXCISE TAX RECEIVABLE	98,500.	63,051.	63,051.	
To Form 990-PF, Part II, line 15	160,316.	124,867.	124,867.	

Form 990-PF	Other Liabilities	Statement	9
Description	BOY Amount	EOY Amount	
DEFERRED FEDERAL EXCISE TAX	103,820.	170,493.	
EXCISE TAXES PAYABLE	0.	66,500.	
Total to Form 990-PF, Part II, line 22	103,820.	236,993.	

Form 990-PF	Explanation Concerning Part VII-A, Line 12	Statement	10
	Qualifying Distribution Statement		

Explanation

During 2017 the Foundation made a contribution to a donor advised fund as part of its Director's Discretionary Program for Directors. This contribution was treated as a qualifying distribution. Contributions to this Fund are exclusively for charitable purposes under Section 170(c)(2)(B).

WILLIAM E SIMON FOUNDATION

EIN: 13-6217788

PART VIII, LINE 1

(A) NAME AND ADDRESS	(B) TITLE AND AVG HOURS WORKED PER WEEK	(C) CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	(D) EXPENSE ACCT. OTHER ALLOWANCES	(E) COMPENSATION
J PETER SIMON C/O WILLIAM E. SIMON & SONS, LLC 310 SOUTH STREET, PO BOX 1913 MORRISTOWN, NJ 07962-1913	DIRECTOR/ CO-CHAIRMAN AS REQUIRED	0	0	0
WILLIAM E SIMON, JR C/O WILLIAM E SIMON & SONS, LLC 310 SOUTH STREET, PO BOX 1913 MORRISTOWN, NJ 07962-1913	DIRECTOR/ CO-CHAIRMAN/ ASST SECRETARY AS REQUIRED	0	0	0
MARY B. SIMON STREEP C/O WILLIAM E SIMON & SONS, LLC 310 SOUTH STREET, PO BOX 1913 MORRISTOWN, NJ 07962-1913	DIRECTOR AS REQUIRED	0	0	0
CAROL LEIGH SIMON PORGES C/O WILLIAM E SIMON & SONS, LLC 310 SOUTH STREET, PO BOX 1913 MORRISTOWN, NJ 07962-1913	VICE PRESIDENT/ TREASURER DIRECTOR AS REQUIRED	0	0	0
AIMEE SIMON BLOOM C/O WILLIAM E SIMON & SONS, LLC 310 SOUTH STREET, PO BOX 1913 MORRISTOWN, NJ 07962-1913	VICE PRESIDENT/ SECRETARY DIRECTOR AS REQUIRED	0	0	0
JULIE SIMON MUNRO C/O WILLIAM E. SIMON & SONS, LLC 310 SOUTH STREET, PO BOX 1913 MORRISTOWN, NJ 07962-1913	DIRECTOR AS REQUIRED	0	0	0
JOHANNA K SIMON C/O WILLIAM E SIMON & SONS, LLC 310 SOUTH STREET, PO BOX 1913 MORRISTOWN, NJ 07962-1913	DIRECTOR AS REQUIRED	0	0	0
DANIEL MOSLEY C/O WILLIAM E SIMON & SONS, LLC 310 SOUTH STREET, PO BOX 1913 MORRISTOWN, NJ 07962-1913	DIRECTOR AS REQUIRED	0	0	0
JAMES PIERESON C/O WILLIAM E SIMON FOUNDATION 140 E 45TH STREET NEW YORK, NY 10017	PRESIDENT/ DIRECTOR 40 HOURS	57,020	0	243,253
WILLIAM WACHENFELD C/O WILLIAM E SIMON & SONS, LLC 310 SOUTH STREET, PO BOX 1913 MORRISTOWN, NJ 07962-1913	DIRECTOR AS REQUIRED	0	0	0
MICHAEL OLIVERI C/O WILLIAM E SIMON & SONS, LLC 310 SOUTH STREET, PO BOX 1913 MORRISTOWN, NJ 07962-1913	ASSISTANT TREASURER AS REQUIRED	0	0	0
TOTAL		\$ 57,020	\$ -	\$ 243,253

WILLIAM E SIMON FOUNDATION

EIN 13-6217788

PART VIII, LINE 2 (A) NAME AND ADDRESS	(B) TITLE AND AVG HOURS WORKED PER WEEK	(C) CONTRIBUTIONS TO EMPLOYEE BENEFIT PLANS	(D) EXPENSE ACCT OTHER ALLOWANCES	(E) COMPENSATION
SARA SNIDER C/O WILLIAM E. SIMON FOUNDATION 140 E. 45TH STREET NEW YORK, NY 10017	40 HOURS	\$ 38,713	\$ -	\$ 178,037
AMY ALLRED C/O WILLIAM E SIMON FOUNDATION 140 E. 45TH STREET NEW YORK, NY 10017	40 HOURS	\$ 30,785	\$ -	\$ 99,762
KAREN PARLOCK C/O WILLIAM E SIMON FOUNDATION 140 E. 45TH STREET NEW YORK, NY 10017	40 HOURS	\$ 25,811	\$ -	\$ 95,984
JANICE RIDDELL C/O WILLIAM E SIMON FOUNDATION 140 E. 45TH STREET NEW YORK, NY 10017	40 HOURS	\$ 13,857	\$ -	\$ 136,000
TOTAL		\$ 109,166	\$ -	\$ 509,783

WILLIAM E SIMON FOUNDATION

EIN 13-6217788

2017 FORM 990-PF

Payment Date	Payee Organization	Amount	Program Area
1/5/2017	Central Park Conservancy 14 East 60th Street New York, New York 10022	\$5,000 00	Others
1/9/2017	First Presbyterian Church of New Vernon PO Box 218 New Vernon, New Jersey 07976	\$10,000 00	Faith
1/9/2017	First Presbyterian Church of New Vernon PO Box 218 New Vernon, New Jersey 07976	\$5,000 00	Faith
1/9/2017	P G Chambers School 15 Halko Drive Cedar Knolls, New Jersey 07927	\$5,000 00	Education
1/9/2017	Canal Alliance 91 Larkspur Street San Rafael, California 94901	\$5,000 00	Family
1/9/2017	Little Sisters of the Poor 140 Shepherd Lane Totowa, New Jersey 07512-2170	\$100 00	Faith
1/9/2017	Richard Nixon Foundation 18001 Yorba Linda Boulevard Yorba Linda, California 92886	\$250,000 00	— Others
1/9/2017	UCLA Foundation 10920 Wilshire Blvd, 11th Floor Los Angeles, California 90024	\$25,000 00	Education
1/9/2017	Diocese of Bridgeport Catholic Center 238 Jewett Avenue Bridgeport, Connecticut 06606-2892	\$100 00	Faith
1/9/2017	International Dominican Foundation 141 East 65th Street New York, New York 10065	\$5,000 00	Faith
1/9/2017	Donors Trust 1800 Diagonal Road Suite 280 Alexandria, Virginia 22314	\$125,000 00	Others

WILLIAM E SIMON FOUNDATION			
EIN. 13-6217788			
2017 FORM 990-PF			
1/9/2017	Georgetown University 3307 M Street Suite 200 Washington, District of Columbia 20057	\$75 00	Education\Scholarship / Tuition Asst
1/9/2017	Sound Body Sound Mind 11100 Santa Monica Blvd Suite 1910 Los Angeles, California 90025	\$75,000 00	Others .
1/9/2017	National Leadership Roundtable on Church Management 415 Michigan Ave N E. Suite 275 Washington, District of Columbia 20017	\$2,500 00	Faith
1/9/2017	Berklee College of Music 1140 Boylston Street MS-1140 DEV Boston, Massachusetts 02215-3693	\$25,000 00	Education
1/9/2017	Friends of the Children New York P O Box 1649 New York, New York 10026	\$100 00	Family
1/9/2017	Donaldson Adoption Institute, Inc 120 E 38th Street New York, New York 10016	\$5,000.00	Family
1/9/2017	Goucher College 1021 Dulaney Valley Road Baltimore, Maryland 21204	\$500 00	Education
1/9/2017	Wake Forest University 1834 Wake Forest Road Winston-Salem, North Carolina 27106	\$25,000.00	Education
1/9/2017	Project EPIC P.O. Box 510 New York, New York 10163-0510	\$5,000 00	Others
1/9/2017	Hill House 10 Riverside Avenue Riverside, Connecticut 06878	\$100.00	Others

WILLIAM E SIMON FOUNDATION			
EIN. 13-6217788			
2017 FORM 990-PF			
1/9/2017	Baptist Health System Foundation 841 Prudential Drive Suite 1300 Jacksonville, Florida 32207	\$50 00	Others
1/9/2017	Thanks USA 1390 Chain Bridge Road Suite 260 McLean, Virginia 22101	\$50 00	Education\Scholarship / Tuition Asst.
1/9/2017	Church of the Epiphany 239 East 21st Street New York, New York 10010	\$40 00	Faith
1/9/2017	This Child Here 245 Seaview Avenue Daytona Beach, Florida 32118	\$5,000 00	Family
1/9/2017	Foundation for Morristown Medical Center 475 South Street, First Floor Morristown, New Jersey 07960	\$250,000 00	Family
1/9/2017	Foundation for Morristown Medical Center 475 South Street, First Floor Morristown, New Jersey 07960	\$10,000 00	Others
1/9/2017	Foundation for Morristown Medical Center 475 South Street, First Floor Morristown, New Jersey 07960	\$10,000 00	Others
1/9/2017	Foundation for Morristown Medical Center 475 South Street, First Floor Morristown, New Jersey 07960	\$10,000 00	Others
1/9/2017	Foundation for Morristown Medical Center 475 South Street, First Floor Morristown, New Jersey 07960	\$10,000 00	Others
1/9/2017	Morristown-Beard School 70 Whippany Road Morristown, New Jersey 07960	\$15,000.00	Education

WILLIAM E SIMON FOUNDATION			
EIN 13-6217788			
2017 FORM 990-PF			
1/9/2017	Newark Academy 91 South Orange Avenue Livingston, New Jersey 07039	\$25,000 00	Education
1/9/2017	Red Oaks School 21 Cutler Street Morristown, New Jersey 07960	\$25,000 00	Education
1/9/2017	Red Oaks School 21 Cutler Street Morristown, New Jersey 07960	\$10,000 00	Education
1/18/2017	Students 2 Science 66 Deforest Avenue East Hanover, New Jersey 07936	\$5,000 00	Education
1/18/2017	Foundation for Morristown Medical Center 475 South Street, First Floor Morristown, New Jersey 07960	\$10,000 00	Others
1/18/2017	Dominican Foundation 141 E 65th Street New York, New York 10065	\$1,000 00	Faith
1/18/2017	Dominican Foundation 141 E 65th Street New York, New York 10065	\$50 00	Faith
1/18/2017	Boston Winter Ball c/o KMC Productions, Inc 150 Wood Road, Suite 300 Braintree, Massachusetts 02184	\$5,000 00	Others
1/18/2017	Meals-on-Wheels, Inc 89 Maple Avenue Greenwich, Connecticut 06830	\$100 00	Others
1/18/2017	Court Appointed Special Advocates of Morris and Sussex Counties, Inc 18 Cattano Avenue Morristown, New Jersey 07963-0264	\$10,000 00	Family
1/18/2017	World Vision, Inc P O Box 9716 Federal Way, Washington 98063	\$468 00	Others

WILLIAM E SIMON FOUNDATION			
EIN 13-6217788			
2017 FORM 990-PF			
1/18/2017	Our Lady of Good Counsel Church 155 West Parkway P O Box 218 Pompton Plains, New Jersey 07444	\$200 00	Faith
1/23/2017	Massachusetts Audubon Society 208 South Great Road Lincoln, Massachusetts 01773	\$12,500.00	Others
1/23/2017	Harwich Conservation Trust PO Box 101 South Harwich, Massachusetts 02661	\$12,500 00	Others
1/23/2017	Saint Joseph Church 216 Comly Road Lincoln Park, New Jersey 07035	\$80 00	Faith
1/23/2017	Boston Winter Ball c/o KMC Productions, Inc 150 Wood Road, Suite 300 Braintree, Massachusetts 02184	\$8,800 00	Others
1/23/2017	Foundation for Morristown Medical Center 475 South Street, First Floor Morristown, New Jersey 07960	\$2,500 00	Others
1/30/2017	American Heart Association 7272 Greenville Avenue Dallas, Texas 75231-4596	\$25 00	Others
1/30/2017	Saint Agnes Church 143 East 43rd Street New York, New York 10017	\$520 00	Faith
2/6/2017	Richard Nixon Foundation 18001 Yorba Linda Boulevard Yorba Linda, California 92886	\$15,000 00	Others
2/6/2017	Manhattan Institute for Policy Research 52 Vanderbilt Avenue New York, New York 10017	\$250,000 00	WES Prizes\Social Entrepreneurship
2/6/2017	World Vision, Inc P O Box 9716 Federal Way, Washington 98063	\$385 00	Others

WILLIAM E SIMON FOUNDATION			
EIN 13-6217788			
2017 FORM 990-PF			
2/6/2017	Archdiocese of Newark 171 Clifton Avenue P O Box 9500 Newark, New Jersey 07104-9500	\$147,105 00	Education\Academic Enhancement
2/6/2017	Saint Peter - Saint Denis Church 91 Ludlow Street Yonkers, New York 10705	\$4,000 00	Faith
2/14/2017	Building One Community 75 Selleck Street Stamford, Connecticut 06905	\$125 00	Family
2/14/2017	New York Botanical Garden 2900 Southern Blvd Bronx, New York 10458	\$135 00	Others
2/14/2017	World Vision, Inc P O Box 9716 Federal Way, Washington 98063	\$38 00	Others
2/14/2017	Susan G Komen Breast Cancer Foundation North Jersey Affiliate 44 Middle Ave Summit, New Jersey 07901	\$5,000 00	Others
2/14/2017	Manhattan Institute for Policy Research 52 Vanderbilt Avenue New York, New York 10017	\$5,000 00	Family
2/14/2017	Parish Catalyst 11100 Santa Monica Blvd Suite 1910 Los Angeles, California 90025	\$250,000 00	Faith
2/21/2017	Educators for Excellence 80 Pine Street, 28th Floor New York, New York 10005	\$30,000 00	Education
2/21/2017	South Bronx United 594 Grand Concourse, Suite 2 Bronx, New York 10451	\$15,000 00	Family

WILLIAM E SIMON FOUNDATION			
EIN: 13-6217788			
2017 FORM 990-PF			
2/21/2017	Student Partner Alliance 561 Springfield Avenue Summit, New Jersey 07901	\$10,000 00	Education\Scholarship / Tuition Asst
2/21/2017	Ramapo for Children 49 West 38th Street 5th Floor New York, New York 10018	\$10,000 00	Family
2/21/2017	Ramapo for Children 49 West 38th Street 5th Floor New York, New York 10018	\$10,000 00	Family
2/21/2017	Assumption College for Sisters 200 A Morris Avenue Denville, New Jersey 07834	\$5,000 00	Education
2/21/2017	Saint Peter's University 2641 Kennedy Blvd Jersey City, New Jersey 07306	\$20,000 00	Faith
2/21/2017	Thomas B Fordham Institute 1016 16th Street, NW 8th Floor Washington, District of Columbia 20036	\$25,000 00	Education
2/21/2017	Good Counsel 411 Clinton Street P O Box 6068 Hoboken, New Jersey 07030-2780	\$10,000 00	Family
2/21/2017	New Jersey SEEDS 494 Broad Street, Suite 105 Newark, New Jersey 07102	\$15,000 00	Education\Scholarship / Tuition Asst
2/21/2017	Morris Educational Foundation P O Box 1224 Morristown, New Jersey 07962-1224	\$300 00	Education
2/27/2017	Cornerstone Family Programs 62 Elm Street Morristown, New Jersey 07960	\$250 00	Family
2/27/2017	Mendham Borough HSA 12 Hilltop Road Mendham, New Jersey 07945	\$500 00	Education

WILLIAM E SIMON FOUNDATION

EIN: 13-6217788

2017 FORM 990-PF

2/27/2017	Novak Family Foundation c/o Mr Richard Novak 2618 Rogers Circle San Antonio, Texas 78258	\$5,000 00	Education
2/27/2017	Part of the Solution 2759 Webster Avenue Bronx, New York 10458- 3708	\$15,000 00	Others
2/27/2017	Institute for Justice 901 N Glebe Road Suite 900 Arlington, Virginia 22203	\$20,000.00	Education
2/27/2017	Villanova University Development Office 800 Lancaster Avenue Villanova, Pennsylvania 19085-1673	\$2,500 00	Education
2/27/2017	Church of Christ the King P O Box 368 Blue Mill Road New Vernon, New Jersey 07976	\$500 00	Faith
2/27/2017	Washington Association of New Jersey P O Box 1473 Morristown, New Jersey 07962	\$5,000 00	Others
2/27/2017	Yogi Berra Museum and Learning Center 8 Yogi Berra Drive Little Falls, New Jersey 07424	\$10,000 00	Others
2/27/2017	Educational Broadcasting Corp 825 Eighth Avenue New York, New York 10019	\$250 00	Others
2/27/2017	Squash and Education Alliance 555 Eighth Avenue Suite 1102 New York, New York 10018	\$25,000 00	Family
2/27/2017	Mendham Borough Library 10 Hilltop Road Mendham, New Jersey 07945	\$500 00	Others

WILLIAM E SIMON FOUNDATION			
EIN 13-6217788			
2017 FORM 990-PF			
2/27/2017	Dollies Making A Difference 440 Toyopa Drive Pacific Palisades, California 90272	\$500 00	Others
3/6/2017	Family Life Academy Charter School 296 East 140th Street Bronx, New York 10454	\$10,000 00	Family
3/6/2017	Mayo Performing Arts Center 100 South Street Morristown, New Jersey 07960	\$1,500 00	Education\Academic Enhancement
3/6/2017	Loyola School 980 Park Avenue New York, New York 10028	\$1,500 00	Education
3/6/2017	Dominican Academy 44 East 68th Street New York, New York 10021	\$35 00	Education
3/6/2017	Adaptive Sports Foundation, Inc c/o Windham Mountain CD Lane Road Windham, New York 12496	\$500 00	Others
3/6/2017	Special Olympics New Jersey 1 Eunice Kennedy Shriver Way Lawrenceville, New Jersey 08648	\$40 00	Others
3/8/2017	Women for Women International 2000 M Street, NW Suite 200 Washington, District of Columbia 20036	\$8,650 00	Others
3/13/2017	American-Scandinavian Foundation 58 Park Avenue New York, New York 10016	\$94 00	Others
3/13/2017	Spring Street Community Development Corp 65 Spring St Morristown, New Jersey 07960	\$4,000 00	Education
3/13/2017	Frost Valley YMCA 2000 Frost Valley Road Claryville, New York 12725	\$25,000 00	Others

WILLIAM E SIMON FOUNDATION			
EIN. 13-6217788			
2017 FORM 990-PF			
3/13/2017	Massachusetts Audubon Society 208 South Great Road Lincoln, Massachusetts 01773	\$25,000 00	Others
3/13/2017	Assumption College for Sisters 200 A Morris Avenue Denville, New Jersey 07834	\$10,000 00	Education
3/13/2017	Andrew McDonough B Positive Foundation 101 Rockland Circle Wilmington, Delaware 19803	\$50.00	Others
3/13/2017	Newark Academy 91 South Orange Avenue Livingston, New Jersey 07039	\$25,000 00	Education
3/20/2017	National Eating Disorders Association 165 West 46th Street, Suite 1211 New York, New York 10036	\$500 00	Others
3/27/2017	Cristo Rey Newark 239 Woodside Avenue Newark, New Jersey 07104-3113	\$10,000 00	Education
3/27/2017	Sacred Heart School 183 Bayview Avenue Jersey City, New Jersey 07305	\$20,000 00	Education\Capital Improvements
3/27/2017	Foundation for Cultural Review, Inc 900 Broadway New York, New York 10003	\$2,500 00	Education
3/27/2017	National Alliance for Public Charter Schools 1101 15th Street NW Suite 1010 Washington, District of Columbia 20005	\$40,000 00	Education
3/27/2017	Donaldson Adoption Institute, Inc. 120 E 38th Street New York, New York 10016	\$8,000 00	Family
3/27/2017	Boys and Girls Clubs of Hudson County 225 Morris Blvd Jersey City, New Jersey 07302	\$30,000 00	Family

WILLIAM E SIMON FOUNDATION			
EIN 13-6217788			
2017 FORM 990-PF			
3/27/2017	Georgetown University 3307 M Street Suite 200 Washington, District of Columbia 20057	\$40,000 00	Faith
3/27/2017	United States Olympic Museum P.O. Box 681 Colorado Springs, Colorado 80901	\$25,000 00	Others
3/27/2017	50CAN 1625 K Street NW Suite 400 Washington, District of Columbia 20006	\$25,000 00	Education
4/3/2017	Drexel Fund 606 E Juneau Ave, #51063S Milwaukee, Wisconsin 53203	\$25,000 00	Education
4/3/2017	Chatham Food Pantry 625 Main Street Chatham, Massachusetts 02633	\$10,000.00	Others
4/3/2017	Cape Cod Symphony Orchestra 1060 Falmouth Road, Suite A Hyannis, Massachusetts 02601	\$25,000 00	Others
4/3/2017	Stanford Law School Crown Quadrangle 559 Nathan Abbott Way Stanford, California 94305	\$40,000 00	Faith
4/3/2017	Harwich Conservation Trust PO Box 101 South Harwich, Massachusetts 02661	\$15,000 00	Others
4/3/2017	Ethical Community Charter School 95 Broadway Jersey City, New Jersey 07306-6304	\$50,000 00	Education
4/3/2017	Roots and Wings Foundation 75 Bloomfield Avenue Suite 303 Denville, New Jersey 07834	\$13,000 00	Family
4/11/2017	Franciscan Missionaries of the Eternal Word 5821 Old Leeds Road Irondale, Alabama 35210-2164	\$125 00	Faith

WILLIAM E SIMON FOUNDATION			
EIN 13-6217788			
2017 FORM 990-PF			
4/11/2017	Stanwich Congregational Church 202 Taconic Road Greenwich, Connecticut 06831	\$10,000 00	Faith
4/11/2017	Summer Search 90 Broad Street Suite 701 New York, New York 10004	\$20,000 00	Family
4/11/2017	Little Sisters of the Poor 140 Shepherd Lane Totowa, New Jersey 07512-2170	\$100 00	Faith
4/11/2017	Greenwich Town Party P O Box 59 Old Greenwich, Connecticut 06870	\$5,000 00	Others
4/11/2017	University of Oxford North American Office 500 Fifth Avenue, 32nd Floor New York, New York 10110	\$25,000 00	Education
4/11/2017	New Jersey City University Foundation 2039 Kennedy Boulevard Hepburn Hall #315 Jersey City, New Jersey 07305	\$1,500 00	Education
4/11/2017	University of Alabama P O. Box 870101 Tusaloosa, Alabama 35487	\$100 00	Education
4/11/2017	New England College 7 Main Street Henniker, New Hampshire 03242-3293	\$25,000 00	Education
4/11/2017	Fibrolamellar Cancer Foundation 20 Horseneck Lane, 2nd Floor Greenwich, Connecticut 06830	\$5,000 00	Others
4/18/2017	National Council for Adoption 225 North Washington Street Alexandria, Virginia 22314-2520	\$75,000 00	Family

WILLIAM E SIMON FOUNDATION			
EIN 13-6217788			
2017 FORM 990-PF			
4/18/2017	Manhattan Institute for Policy Research 52 Vanderbilt Avenue New York, New York 10017	\$75,000 00	Family
4/18/2017	Girls Educational and Mentoring Services, Inc 201 West 148th Street, Ground Fl New York, New York 10039	\$2,000 00	Family
4/18/2017	Good Grief 38 Elm Street Morristown, New Jersey 07960	\$50,000 00	Family
4/18/2017	Big Brothers Big Sisters of Essex, Hudson, and Union Counties 500 Broad St , 2nd Floor Newark, New Jersey 07102	\$100,000 00	Family
4/24/2017	Heritage Foundation 214 Massachusetts Avenue, N E Washington, District of Columbia 20002-4999	\$75,000 00	Faith
4/24/2017	Seton Education Partners 7765 Orien Avenue La Mesa, California 91941	\$75,000 00	Education
4/24/2017	Good Grief 38 Elm Street Morristown, New Jersey 07960	\$1,500 00	Family
4/24/2017	First Choice Women's Resource Centers 82 Speedwell Avenue Morristown, New Jersey 07960	\$22,500 00	Family
4/24/2017	First Choice Women's Resource Centers 82 Speedwell Avenue Morristown, New Jersey 07960	\$22,500 00	Family
4/24/2017	Future Five 135 Atlantic Street Stamford, Connecticut 06901	\$5,000 00	Family

WILLIAM E SIMON FOUNDATION			
EIN 13-6217788			
2017 FORM 990-PF			
4/24/2017	Partnership for Inner-City Education 1011 First Avenue 18th Floor New York, New York 10022	\$75,000 00	Education
4/24/2017	Success Academy Charter Schools 95 Pine Street, 6th Floor New York, New York 10005	\$200,000 00	Education
4/24/2017	National Council on Teacher Quality 1120 G Street NW, Suite 800 Washington, District of Columbia 20005	\$5,000 00	Education
4/24/2017	Jersey Battered Women's Services P O Box 1437 Morristown, New Jersey 07962	\$50,000 00	Family
4/24/2017	American Cancer Society 7 Ridgedale Avenue, Suite 103 Cedar Knolls, New Jersey 07927	\$500 00	Others
4/24/2017	Our Lady of Good Counsel Church 155 West Parkway P.O. Box 218 Pompton Plains, New Jersey 07444	\$150 00	Faith
4/24/2017	American Federation for Children Growth Fund 1020 19th Street, NW Suite 675 Washington, District of Columbia 20036	\$150,000 00	Education
4/24/2017	Summer Search 90 Broad Street Suite 701 New York, New York 10004	\$50,000 00	Family
4/24/2017	Summer Search 90 Broad Street Suite 701 New York, New York 10004	\$10,000 00	Family
4/24/2017	Tri-County Scholarship Fund 4 Century Drive 1st Floor Parsippany, New Jersey 07054	\$40,000 00	Education\Scholarship / Tuition Asst

WILLIAM E SIMON FOUNDATION			
EIN. 13-6217788			
2017 FORM 990-PF			
4/24/2017	Ethics and Public Policy Center 1730 M Street, NW Suite 910 Washington, District of Columbia 20036	\$200,000.00	Faith
4/24/2017	Shakespeare Theatre of New Jersey, Inc. 36 Madison Avenue Madison, New Jersey 07940	\$750 00	Education
4/24/2017	Paper Mill Playhouse 22 Brookside Drive Millburn, New Jersey 07041	\$500 00	Others
4/24/2017	Fiver Children's Foundation 519 Eighth Avenue Floor 24 New York, New York 10018	\$1,000 00	Family
4/24/2017	Acton Institute for the Study of Religion and Liberty 98 Fulton Street E Grand Rapids, Michigan 49503	\$55,000 00	Faith
5/1/2017	Covenant House New Jersey 330 Washington Street Newark, New Jersey 07102	\$50,000 00	Family
5/1/2017	Saint Joseph Church 216 Comly Road Lincoln Park, New Jersey 07035	\$25 00	Faith
5/9/2017	Harvard University John F Kennedy School of Government 79 JF Kennedy Street, Taubman 304 Cambridge, Massachusetts 02138	\$35,000 00	Education
5/9/2017	Soaring Heights Charter School 1 Romar Avenue Jersey City, New Jersey 07305	\$65,000 00	Education
5/9/2017	Brilla College Preparatory Charter Schools 413 E 144th Street Bronx, New York 10454	\$50,000.00	Education

WILLIAM E SIMON FOUNDATION			
EIN 13-6217788			
2017 FORM 990-PF			
5/9/2017	Covenant House New Jersey 330 Washington Street Newark, New Jersey 07102	\$75,000 00	Family
5/9/2017	Covenant House New Jersey 330 Washington Street Newark, New Jersey 07102	\$1,000 00	Family
5/9/2017	Saint Peter's Episcopal Church 70 Maple Avenue Morristown, New Jersey 07960	\$20,000 00	Faith
5/9/2017	Cornelia Connelly Center 220 East 4th Street New York, New York 10009	\$5,000 00	Education
5/9/2017	Saint Dominic Academy 2572 Kennedy Blvd Jersey City, New Jersey 07304	\$15,000 00	Education
5/9/2017	Freedom Institute 515 Madison Avenue New York, New York 10022	\$2,500 00	Others
5/15/2017	Tri-County Scholarship Fund 4 Century Drive 1st Floor Parsippany, New Jersey 07054	\$50,000 00	Education\Scholarship / Tuition Asst
5/15/2017	Homeless Solutions, Inc 6 Dumont Place, 3rd Floor Morristown, New Jersey 07960	\$150,000 00	Others
5/15/2017	Foundation for Morristown Medical Center 475 South Street, First Floor Morristown, New Jersey 07960	\$10,000 00	Others
5/22/2017	Green Dot Public Schools National 1149 S Hill Street, Suite 600 Los Angeles, California 90015	\$5,000 00	Education
5/22/2017	Witherspoon Institute 16 Stockton Street Princeton, New Jersey 08540	\$125,000.00	Faith

WILLIAM E SIMON FOUNDATION			
EIN 13-6217788			
2017 FORM 990-PF			
5/22/2017	Catholic Schools Foundation 67 Batterymarch Street 6th Floor Boston, Massachusetts 02110	\$10,000 00	Education\Scholarship / Tuition Asst
5/22/2017	Seton Education Partners 7765 Orien Avenue La Mesa, California 91941	\$25,000 00	Education
5/22/2017	Church of the Holy Spirit 318 Newark-Pompton Turnpike Pequannock, New Jersey 07440	\$75 00	Faith
5/30/2017	Vroom Street Church 155 Vroom Street Jersey City, New Jersey 07306	\$40,000 00	Faith
5/30/2017	Saint Mary Abbey 230 Mendham Road Morristown, New Jersey 07960	\$10,000 00	Education
5/30/2017	Tudor City Greens 5 Tudor City Place Box #1-E New York, New York 10017	\$750 00	Others
5/30/2017	Homeless Solutions, Inc. 6 Dumont Place, 3rd Floor Morristown, New Jersey 07960	\$15,000 00	Others
5/30/2017	Avail NYC 115 West 45th Street, 4th Floor New York, New York 10036	\$5,000 00	Family
6/6/2017	Morristown-Beard School 70 Whippany Road Morristown, New Jersey 07960	\$83,334 00	Education
6/6/2017	Tudor City Greens 5 Tudor City Place Box #1-E New York, New York 10017	\$50 00	Others
6/6/2017	Catholic Education Partners Sagamore Institute 2902 N Meridian Street Indianapolis, Indiana 46208	\$50,000 00	Education

WILLIAM E SIMON FOUNDATION			
EIN 13-6217788			
2017 FORM 990-PF			
6/6/2017	Elon University Johnston Hall 213 2300 Campus Box Elon, North Carolina 27244	\$16,666 00	Education
6/6/2017	Random Acts of Flowers 3500 Workman Road #101A Knoxville, Tennessee 37921	\$25,000 00	Others
6/6/2017	Boys and Girls Clubs of Newark 1 Avon Avenue Newark, New Jersey 07108	\$500.00	Family
6/6/2017	Vassar College 124 Raymond Avenue Poughkeepsie, New York 12604	\$10,000 00	Education
6/6/2017	Vassar College 124 Raymond Avenue Poughkeepsie, New York 12604	\$10,000 00	Education
6/6/2017	Seton Hall University 400 South Orange Avenue South Orange, New Jersey 07079	\$20,000 00	Faith
6/6/2017	Girls Educational and Mentoring Services, Inc 201 West 148th Street, Ground Fl New York, New York 10039	\$25,000 00	Family
6/6/2017	Boys and Girls Clubs of Hudson County 225 Morris Blvd Jersey City, New Jersey 07302	\$20,000 00	Family
6/6/2017	National Review Institute 19 W. 44th Street Suite 1701 New York, New York 10036	\$10,000 00	Faith
6/6/2017	Classical Charter Schools 977 Fox Street Bronx, New York 10459	\$35,000 00	Education
6/6/2017	Daytop New Jersey P O. Box 310 80 West Main Street Mendham, New Jersey 07945	\$250 00	Others

WILLIAM E SIMON FOUNDATION

EIN 13-6217788

2017 FORM 990-PF

6/6/2017	Intérfaith Food Pantry 2 Executive Drive Morris Plains, New Jersey 07950	\$10,000.00	Others
6/12/2017	Community Soup Kitchen 36 South Street Morristown, New Jersey 07960	\$10,000 00	Others
6/19/2017	South Bronx United 594 Grand Concourse, Suite 2 Bronx, New York 10451	\$10,000 00	Family
6/19/2017	Kent Place School 42 Norwood Avenue Summit, New Jersey 07902-0308	\$1,000 00	Education
6/19/2017	AmeriCares 88 Hamilton Avenue Stamford, Connecticut 06902	\$5,000 00	Others
6/26/2017	Jersey Battered Women's Services P O Box 1437 Morristown, New Jersey 07962	\$750 00	Family
6/26/2017	Ethical Community Charter School 95 Broadway Jersey City, New Jersey 07306-6304	\$50,000 00	Education
6/26/2017	Buoniconti Fund to Cure Paralysis, Inc 1095 NW 14th Terrace Miami, Florida 33136	\$1,500 00	Others
6/26/2017	Stepping Stones Museum for Children 303 West Avenue Norwalk, Connecticut 06850	\$90 00	Others
6/26/2017	Saint Agnes Church 143 East 43rd Street New York, New York 10017	\$500.00	Faith
6/26/2017	Darien Library 1441 Post Road Darien, Connecticut 06820	\$500 00	Others
6/26/2017	Foundation for Morristown Medical Center 475 South Street, First Floor Morristown, New Jersey 07960	\$2,500 00	Others

WILLIAM E SIMON FOUNDATION			
EIN 13-6217788			
2017 FORM 990-PF			
7/5/2017	Shatterproof 950 Sixth Ave 10th Floor New York, New York 10001	\$1,000.00	Others
7/5/2017	Saint Sebastian Sports Project PO Box 1711 Manhattan Beach, California 90267	\$5,000 00	Others
7/5/2017	Dominican Academy 44 East 68th Street New York, New York 10021	\$500 00	Education
7/5/2017	Autism Society 4340 East-West Hwy Suite 350 Bethesda, Maryland 20814	\$500 00	Others
7/5/2017	Partnership for Inner- City Education 1011 First Avenue 18th Floor New York, New York 10022	\$25,000 00	Education
7/7/2017	Squash and Education Alliance 555 Eighth Avenue Suite 1102 New York, New York 10018	\$25,000 00	Family
7/7/2017	Colgate University 13 Oak Drive Hamilton, New York 13346	\$25 00	Education
7/7/2017	Corpus Christi Parish 880 Toyopa Drive Pacific Palisades, California 90272	\$7,000 00	Faith
7/7/2017	Caring House 2625 Pickett Road Durham, North Carolina 27705	\$2,500.00	Others
7/17/2017	Saint John Church 1986 Post Road Darien, Connecticut 06820	\$275 00	Faith
7/17/2017	Future Five 135 Atlantic Street Stamford, Connecticut 06901	\$25,000 00	Family
7/24/2017	Great Swamp Watershed Association P O Box 300 New Vernon, New Jersey 07976	\$3,000 00	Others
7/24/2017	Saint Ignatius School 740 Manida Street Bronx, New York 10474	\$20,000 00	Education

WILLIAM E. SIMON FOUNDATION			
EIN. 13-6217788			
2017 FORM 990-PF			
7/24/2017	University of Rochester WES Graduate School of Business Administration RC Box 270100 Rochester, New York 14627	\$50,000 00	Education\Scholarship / Tuition Asst
7/24/2017	Boy Scouts of America Greater New York Councils The Empire State Building 350 Fifth Avenue Suite 7820 New York, New York 10118-0199	\$5,000 00	Family
7/24/2017	Morris Museum 6 Normandy Heights Road Morristown, New Jersey 07960	\$1,000 00	Education
7/24/2017	Pepperdine University 24255 Pacific Coast Highway Malibu, California 90263-4443	\$100,000.00	Education
8/1/2017	Philanthropy Roundtable 1120 20th Street NW Suite 550 South Washington, District of Columbia 20036	\$35,000 00	Education
8/1/2017	Pan Mass Challenge 77 Fourth Avenue Needham, Massachusetts 02194	\$1,000 00	Others
8/1/2017	Order of Malta Clinic of Northern California 2121 Harrison Street #110 Oakland, California 94612	\$5,000 00	Others
8/1/2017	Children's Scholarship Fund 8 West 38th Street, 9th Floor New York, New York 10018-6229	\$230,625 00	Education\Scholarship / Tuition Asst.
8/1/2017	Children's Scholarship Fund 8 West 38th Street, 9th Floor New York, New York 10018-6229	\$250,000 00	Education\Scholarship / Tuition Asst
8/1/2017	Pivot Ministries 485 Jane Street Bridgeport, Connecticut 06608	\$5,000 00	Others

WILLIAM E SIMON FOUNDATION

EIN 13-6217788

2017 FORM 990-PF

8/1/2017	Brilla College Preparatory Charter Schools 413 E 144th Street Bronx, New York 10454	\$25,000 00	Education
8/1/2017	Saint Labre Indian School P.O Box 216 Ashland, Montana 59003	\$25.00	Education
8/7/2017	Pivot Ministries 485 Jane Street Bridgeport, Connecticut 06608	\$5,000 00	Others
8/7/2017	Court Appointed Special Advocates of Morris and Sussex Counties, Inc 18 Cattano Avenue Morristown, New Jersey 07963-0264	\$15,000 00	Family
8/7/2017	New City Kids 240 Fairmount Avenue Jersey City, New Jersey 07306	\$65,000 00	Faith
8/7/2017	Deirdre's House 8 Court Street Morristown, New Jersey 07930	\$50,000 00	Family
8/14/2017	Rising Tide Capital 384 Martin Luther King Drive Jersey City, New Jersey 07305	\$2,500 00	Others
8/14/2017	Parents for Educational Freedom in North Carolina 434 Fayetteville St , Suite 1620 Raleigh, North Carolina 27601	\$5,000 00	Education
8/22/2017	Children's Aid College Prep Charter School 1919 Prospect Avenue 3rd Floor Bronx, New York 10457	\$20,000 00	Education
8/22/2017	Court Appointed Special Advocates for Children of Essex County, Inc 212 Washington Street Room 912 Newark, New Jersey 07102	\$2,500 00	Family

WILLIAM E SIMON FOUNDATION			
EIN 13-6217788			
2017 FORM 990-PF			
8/22/2017	Princeton University Department of Politics 244 Corwin Hall Princeton, New Jersey 08544-1013	\$120,000 00	Faith
8/22/2017	National Right to Work Legal Defense Foundation 8001 Braddock Road Springfield, Virginia 22160	\$20,000 00	Education
8/28/2017	Team Walker 373 Communipaw Avenue Jersey City, New Jersey 07304	\$25,000 00	Education
8/28/2017	GuideStar 4801 Courthouse Street Suite 220 Williamsburg, Virginia 23188	\$1,000 00	Others
8/28/2017	Preschool Advantage 25 Lindsley Drive Suite 307 Morristown, New Jersey 07960	\$7,500 00	Education
9/5/2017	Elon University Johnston Hall 213 2300 Campus Box Elon, North Carolina 27244	\$50,000 00	Education\Scholarship / Tuition Asst
9/5/2017	Elon University Johnston Hall 213 2300 Campus Box Elon, North Carolina 27244	\$50,000 00	Education\Scholarship / Tuition Asst
9/5/2017	First Choice Women's Resource Centers 82 Speedwell Avenue Morristown, New Jersey 07960	\$7,500 00	Family
9/5/2017	First Choice Women's Resource Centers 82 Speedwell Avenue Morristown, New Jersey 07960	\$7,500 00	Family
9/5/2017	Taproot Foundation 40 Worth Street, Suite 601 New York, New York 10013	\$5,000 00	Others

WILLIAM E SIMON FOUNDATION			
EIN. 13-6217788			
2017 FORM 990-PF			
9/5/2017	Sisters of Saint Francis of Peace 20 Ridge Street Haverstraw, New York 10927-1198	\$25.00	Faith
9/5/2017	Semper Fi Fund 825 College Blvd Suite 102, PMB 609 Oceanside, California 92057	\$25,000.00	Family
9/11/2017	Good Grief 38 Elm Street Morristown, New Jersey 07960	\$25,000 00	Family
9/11/2017	Church of the Holy Spirit 318 Newark-Pompton Turnpike Pequannock, New Jersey 07440	\$200.00	Faith
9/11/2017	Preschool Advantage 25 Lindsley Drive Suite 307 Morristown, New Jersey 07960	\$5,000 00	Education
9/18/2017	Catholic Extension 150 South Wacker Drive Suite 2000 Chicago, Illinois 60606	\$500.00	Faith
9/18/2017	Good Grief 38 Elm Street Morristown, New Jersey 07960	\$25,000 00	Family
9/18/2017	Little Sisters of the Poor 140 Shepherd Lane Totowa, New Jersey 07512-2170	\$500 00	Faith
9/25/2017	Madison Square Boys and Girls Club 733 Third Avenue Floor 2 New York, New York 10017	\$5,000 00	Family
9/25/2017	National Pancreas Foundation 3 Bethesda Metro Center Suite 700 Bethesda, Maryland 20814	\$1,000 00	Others
9/25/2017	Community Foundation of New Jersey P O Box 338 35 Knox Hill Road Morristown, New Jersey 07963-0317	\$32,950 50	Education\Scholarship / Tuition Asst

WILLIAM E SIMON FOUNDATION			
EIN 13-6217788			
2017 FORM 990-PF			
9/25/2017	BlinkNow Foundation P O Box 453 Mendham, New Jersey 07945	\$1,000 00	Others
9/25/2017	Cardinal Glennon Children's Foundation 3800 Park Avenue Saint Louis, Missouri 63101	\$500 00	Others
9/25/2017	Marine Corps Scholarship Foundation 909 N. Washington Street, Suite 400 Alexandria, Virginia 22314	\$500 00	Education
10/2/2017	Philanthropy Roundtable 1120 20th Street NW Suite 550 South Washington, District of Columbia 20036	\$10,000 00	Others
10/2/2017	Newark Academy 91 South Orange Avenue Livingston, New Jersey 07039	\$20,000.00	Education
10/2/2017	Connie Dwyer Breast Cancer Foundation P O Box 85 Short Hills, New Jersey 07078	\$2,500 00	Others
10/2/2017	BlinkNow Foundation P.O Box 453 Mendham, New Jersey 07945	\$10,000 00	Others
10/2/2017	Community Foundation of New Jersey P.O Box 338 35 Knox Hill Road Morristown, New Jersey 07963-0317	\$5,000 00	Others
10/2/2017	Tri-County Scholarship Fund 4 Century Drive 1st Floor Parsippany, New Jersey 07054	\$5,000 00	Education
10/10/2017	Washington Association of New Jersey P O Box 1473 Morristown, New Jersey 07962	\$10,000 00	Others

WILLIAM E SIMON FOUNDATION			
EIN 13-6217788			
2017 FORM 990-PF			
10/10/2017	Federalist Society for Law & Public Policy Studies 1776 I Street NW Suite # 300 Washington, District of Columbia 20006	\$40,000.00	Faith
10/10/2017	Gladney Center for Adoption 6300 John Ryan Drive Fort Worth, Texas 76132-4122	\$5,000 00	Family
10/10/2017	Saint Ignatius School 740 Manida Street Bronx, New York 10474	\$30,000 00	Education\Academic Enhancement
10/10/2017	Catholic Information Center 1501 K Street, NW Washington, District of Columbia 20005	\$2,500 00	Faith
10/10/2017	Connie Dwyer Breast Cancer Foundation P O Box 85 Short Hills, New Jersey 07078	\$2,500 00	Others
10/10/2017	New York City Ballet New York State Theater 20 Lincoln Center New York, New York 10023	\$2,500 00	Others
10/10/2017	Morris Arts 14 Maple Avenue, Suite 301 Morristown, New Jersey 07960	\$5,000 00	Family
10/16/2017	Grace Church Van Vorst 39 Erie Street Jersey City, New Jersey 07302	\$20,000 00	Faith
10/16/2017	Institute on Religion and Public Life 35 East 21st Street 6th Floor New York, New York 10010	\$50,000 00	Faith
10/16/2017	Children's Health Fund 215 West 125th Street Suite 301 New York, New York 10027	\$10,000 00	Family
10/16/2017	UCLA Foundation 10920 Wilshire Blvd, 11th Floor Los Angeles, California 90024	\$20,000 00	Education

WILLIAM E SIMON FOUNDATION			
EIN 13-6217788			
2017 FORM 990-PF			
10/16/2017	Intercollegiate Studies Institute 3901 Centerville Road Wilmington, Delaware 19807-1431	\$30,000 00	Faith
10/16/2017	All Hallows High School 111 East 164th Street Bronx, New York 10452	\$25,000 00	Education\Scholarship / Tuition Asst
10/24/2017	Washington Association of New Jersey P O Box 1473 Morristown, New Jersey 07962	\$2,500 00	Others
10/24/2017	South Bronx Educational Foundation Inc 843 Crotona Park North Bronx, New York 10460	\$750.00	Family
10/24/2017	Prison Fellowship 44180 Riverside Parkway Lansdowne, Virginia 20176	\$5,000 00	Faith
10/24/2017	Providence College Providence, Rhode Island 02918-0001	\$1,500 00	Education\Academic Enhancement
10/24/2017	Cancer Hope Network 2 North Road Suite A Chester, New Jersey 07930-2308	\$2,500 00	Others
10/24/2017	Girls Educational and Mentoring Services, Inc 201 West 148th Street, Ground Fl New York, New York 10039	\$500.00	Family
10/24/2017	Good Counsel 411 Clinton Street P O Box 6068 Hoboken, New Jersey 07030-2780	\$500 00	Family
10/24/2017	New City Kids 240 Fairmount Avenue Jersey City, New Jersey 07306	\$500.00	Family
10/24/2017	Fellowship of Catholic University Students, Inc P O Box 18710 Golden, Colorado 80402	\$500 00	Faith

WILLIAM E. SIMON FOUNDATION			
EIN. 13-6217788			
2017 FORM 990-PF			
10/24/2017	National Review Institute 19 W. 44th Street Suite 1701 New York, New York 10036	\$1,000 00	Faith
10/24/2017	First Choice Women's Resource Centers 82 Speedwell Avenue Morristown, New Jersey 07960	\$500 00	Family
10/24/2017	LAMP Ministries 2704 Schurz Avenue Bronx, New York 10465- 3173	\$500 00	Faith
10/24/2017	Good Grief 38 Elm Street Morristown, New Jersey 07960	\$1,000 00	Family
10/24/2017	Collegiate Cultural Foundation 218 West State Street Media, Pennsylvania 19063	\$500 00	Family
10/24/2017	Cornerstone Family Programs 62 Elm Street Morristown, New Jersey 07960	\$100 00	Family
10/24/2017	Cornerstone Family Programs 62 Elm Street Morristown, New Jersey 07960	\$50 00	Family
10/24/2017	Our Lady of Lourdes Church One Eagle Rock Avenue West Orange, New Jersey 07052	\$6,419 00	Faith
10/24/2017	Center Nursery School 11 Center Street Manchester, Connecticut 06040	\$750 00	Education
10/24/2017	Epiphany School Foundation 234 East 22nd Street New York, New York 10010	\$27 00	Education
10/27/2017	Cornerstone Family Programs 62 Elm Street Morristown, New Jersey 07960	\$2,000 00	Family

WILLIAM E SIMON FOUNDATION			
EIN 13-6217788			
2017 FORM 990-PF			
11/6/2017	Cornerstone Family Programs 62 Elm Street Morristown, New Jersey 07960	\$100 00	Family
11/6/2017	Cornerstone Family Programs 62 Elm Street Morristown, New Jersey 07960	\$25 00	Family
11/6/2017	Philanthropy Roundtable 1120 20th Street NW Suite 550 South Washington, District of Columbia 20036	\$5,000 00	Others
11/6/2017	DonorsChoose 134 W 37th Street 11th Floor New York, New York 10018	\$40 00	Education
11/6/2017	Boy Scouts of America Greenwich Council 63 Mason Street Greenwich, Connecticut 06830	\$25,000 00	Family
11/6/2017	George Washington's Mount Vernon P.O Box 110 Mount Vernon, Virginia 22121	\$1,000 00	Education
11/6/2017	Columbia University Medical Center Office of Development 100 Haven Avenue, Suite 29D New York, New York 10032	\$25.00	Others
11/6/2017	Collegiate Cultural Foundation 218 West State Street Media, Pennsylvania 19063	\$2,500 00	Family
11/6/2017	Big Brothers Big Sisters of Essex, Hudson, and Union Counties 500 Broad St , 2nd Floor Newark, New Jersey 07102	\$25,000 00	Family
11/6/2017	Good Grief 38 Elm Street Morristown, New Jersey 07960	\$10,000 00	Family

WILLIAM E. SIMON FOUNDATION			
EIN 13-6217788			
2017 FORM 990-PF			
11/6/2017	Greenwich Hospital Association 5 Perryridge Road Greenwich, Connecticut 06830-4697	\$5,000 00	Others
11/6/2017	Deerfield Academy 7 Boyden Lane PO Box 87 Deerfield, Massachusetts 01342	\$50,000 00	Education
11/6/2017	Golden Door Charter School 3040 Kennedy Blvd. Jersey City, New Jersey 07302	\$20,000 00	Education
11/6/2017	Kent Place School 42 Norwood Avenue Summit, New Jersey 07902-0308	\$1,500 00	Education
11/6/2017	New Leaders 30 West 26th Street New York, New York 10010	\$2,500 00	Education
11/6/2017	University of Southern California Sol Price School of Public Policy 650 Childs Way, RGL 312 Los Angeles, California 90089-0626	\$10,000 00	Education
11/6/2017	USA Swimming Foundation 1 Olympic Plaza Colorado Springs, Colorado 80909-5770	\$50 00	Others
11/6/2017	Mayo Performing Arts Center 100 South Street Morristown, New Jersey 07960	\$250 00	Education
11/6/2017	Madison Square Boys and Girls Club 733 Third Avenue Floor 2 New York, New York 10017	\$35,000 00	Family
11/6/2017	Greenwich Country Day School P.O Box 623 Greenwich, Connecticut 06836	\$10,000 00	Education
11/6/2017	Vassar College 124 Raymond Avenue Poughkeepsie, New York 12604	\$10,000 00	Education

WILLIAM E SIMON FOUNDATION			
EIN 13-6217788			
2017 FORM 990-PF			
11/7/2017	Boston College More Hall 140 Commonwealth Avenue Chestnut Hill, Massachusetts 02167- 3819	\$10,000 00	Education
11/7/2017	Boston College More Hall 140 Commonwealth Avenue Chestnut Hill, Massachusetts 02167- 3819	\$10,000 00	Education
11/14/2017	Blair Academy 2 Park Street P O Box 600 Blairstown, New Jersey 07825	\$15,000 00	Education
11/14/2017	Loyola School 980 Park Avenue New York, New York 10028	\$2,000 00	Education
11/14/2017	Fordham University Rose Hill Campus Bronx, New York 10458	\$1,000 00	Education
11/14/2017	Sovereign Military Order of Malta Western Association 610 16th Street, Suite 410 Oakland, California 94612	\$5,000 00	Faith
11/14/2017	Michael J Fox Foundation for Parkinson's Research Grand Central Station P O Box 4777 New York, New York 10163	\$50 00	Others
11/14/2017	Saint Vincent de Paul Society - San Rafael 820 B Street PO Box 150527 San Rafael, California 94915	\$25,000 00	Faith
11/14/2017	Church of Christ the King P O. Box 368 Blue Mill Road New Vernon, New Jersey 07976	\$300.00	Faith
11/14/2017	Sisters of Saint Joseph of Springfield 34 Lower Westfield Road Holyoke, Massachusetts 01040	\$1,000 00	Faith

WILLIAM E. SIMON FOUNDATION			
EIN. 13-6217788			
2017 FORM 990-PF			
11/14/2017	American Special Children's Pilgrimage Group P O Box 633 Bergenfield, New Jersey 07621	\$500 00	Faith
11/14/2017	Pediatric Brain Tumor Foundation 302 Ridgefield Court Asheville, North Carolina 28806	\$40 00	Others
11/14/2017	New City Kids 240 Fairmount Avenue Jersey City, New Jersey 07306	\$65,000 00	Family
11/14/2017	New City Kids 240 Fairmount Avenue Jersey City, New Jersey 07306	\$500 00	Family
11/14/2017	Gunston Hall 10709 Gunston Road Mason Neck, Virginia 22079	\$500 00	Others
11/14/2017	City Gardens Club of New York City 755 Park Avenue New York, New York 10021	\$500 00	Others
11/14/2017	Saint Anne's Home Little Sisters of the Poor 300 Lake Street San Francisco, California 94118	\$5,000.00	Others
11/14/2017	Vermont Children's Trust Foundation 95 St Paul St , Suite 330 Burlington, Vermont 05401	\$5,000 00	Family
11/14/2017	UMS-Wright Preparatory School 65 Mobile Street Mobile, Alabama 36607	\$500 00	Education
11/14/2017	Epiphany School Foundation 234 East 22nd Street New York, New York 10010	\$500 00	Education
11/14/2017	Cornerstone Family Programs 62 Elm Street Morristown, New Jersey 07960	\$100 00	Family

WILLIAM E SIMON FOUNDATION			
EIN 13-6217788			
2017 FORM 990-PF			
11/14/2017	EdChoice 111 Monument Circle Suite 2650 Indianapolis, Indiana 46250	\$5,000 00	Education
11/20/2017	Rocking the Boat 812 Edgewater Road Bronx, New York 10474	\$15,000 00	Family
11/20/2017	Sacred Heart School 183 Bayview Avenue Jersey City, New Jersey 07305	\$10,000.00	Education
11/20/2017	Hunts Point Alliance for Children P O Box 740190 Bronx, New York 10474	\$75,000 00	Family
11/20/2017	Charter School Growth Fund 10901 W 120th Ave Suite 450 Broomfield, Colorado 80021	\$50,000 00	Education
11/20/2017	Charter School Growth Fund 10901 W 120th Ave Suite 450 Broomfield, Colorado 80021	\$175,000 00	Education
11/20/2017	Hamilton Partnership for Paterson 72 McBride Avenue 2rd Floor Paterson, New Jersey 07501	\$1,000 00	Others
11/20/2017	Golden Door Charter School 3040 Kennedy Blvd Jersey City, New Jersey 07302	\$5,000 00	Education
11/20/2017	Church of Christ the King P.O Box 368 Blue Mill Road New Vernon, New Jersey 07976	\$300 00	Faith
11/20/2017	Parents Television Council 707 Wilshire Boulevard Suite 2075 Los Angeles, California 90017	\$35,000 00	Family
11/20/2017	Gladney Center for Adoption 6300 John Ryan Drive Fort Worth, Texas 76132-4122	\$5,000 00	Family

WILLIAM E SIMON FOUNDATION

EIN 13-6217788

2017 FORM 990-PF

11/20/2017	American Federation for Children Growth Fund 1020 19th Street, NW Suite 675 Washington, District of Columbia 20036	\$5,000 00	Education
11/20/2017	University of Vermont Grasse Mount 411 Main Street Burlington, Vermont 05401-3470	\$10,000 00	Education
11/20/2017	University of Vermont Grasse Mount 411 Main Street Burlington, Vermont 05401-3470	\$10,000 00	Education
11/27/2017	Villanova University Development Office 800 Lancaster Avenue Villanova, Pennsylvania 19085-1673	\$2,500 00	Education
11/27/2017	Church of Christ the King P O. Box 368 Blue Mill Road New Vernon, New Jersey 07976	\$500 00	Faith
11/27/2017	Church of Christ the King P O Box 368 Blue Mill Road New Vernon, New Jersey 07976	\$300 00	Faith
11/27/2017	BlinkNow Foundation P O Box 453 Mendham, New Jersey 07945	\$500 00	Others
11/27/2017	Saint Hilary School 765 Hilary Drive Tiburon, California 94920	\$6,000 00	Education
11/27/2017	JMT Advance 184 S Livingston Ave Suite 9, #238 Livingston, New Jersey 07039	\$1,000 00	Others
11/27/2017	Newark Academy 91 South Orange Avenue Livingston, New Jersey 07039	\$11,550 00	Education

WILLIAM E SIMON FOUNDATION			
EIN 13-6217788			
2017 FORM 990-PF			
12/4/2017	Newark Academy 91 South Orange Avenue Livingston, New Jersey 07039	\$20,000 00	Education
12/4/2017	Archdiocese of New York 1011 First Avenue New York, New York 10022-4134	\$25,000 00	Faith
12/4/2017	Riverview School 551 Route 6A East Sandwich, Massachusetts 02537	\$4,500 00	Education
12/4/2017	Indiana University P O Box 500 Bloomington, Indiana 47402	\$15,000 00	Education
12/5/2017	Leadership Network 12700 Park Central Drive Suite 500 Dallas, Texas 75251	\$20,000 00	Faith
12/5/2017	Spring Street Community Development Corp 65 Spring St Morristown, New Jersey 07960	\$6,000 00	Family
12/5/2017	Foundation for Excellence in Education P.O Box 10691 Tallahassee, Florida 32302	\$25,000 00	Education
12/5/2017	Saint Nicholas School 118 Ferry Street Jersey City, New Jersey 07307	\$25,000 00	Education
12/5/2017	Family Life Academy Charter School 296 East 140th Street Bronx, New York 10454	\$10,000 00	Family
12/5/2017	Church of Christ the King P O Box 368 Blue Mill Road New Vernon, New Jersey 07976	\$300 00	Faith
12/5/2017	Church of Christ the King P O Box 368 Blue Mill Road New Vernon, New Jersey 07976	\$50 00	Faith

WILLIAM E SIMON FOUNDATION			
EIN. 13-6217788			
2017 FORM 990-PF			
12/5/2017	Pacific Research Institute for Public Policy 101 Montgomery Street Suite 1300 San Francisco, California 94104	\$60,000 00	Education
12/5/2017	Civic Builders 304 Hudson Street, 3rd Floor New York, New York 10013	\$250,000 00	Education\Capital Improvements
12/5/2017	Civic Builders 304 Hudson Street, 3rd Floor New York, New York 10013	\$50,000 00	Education\Capital Improvements
12/5/2017	YMCA of Greater New York 2 Castle Hill Road Bronx, New York 10473	\$7,500 00	Family
12/5/2017	Manhattan Institute for Policy Research 52 Vanderbilt Avenue New York, New York 10017	\$70,000 00	WES Prizes\Social Entrepreneurship
12/5/2017	Student Sponsor Partners 424 Madison Avenue, Ste. 1002 New York, New York 10017	\$75,000 00	Education\Scholarship / Tuition Asst
12/5/2017	Big Brothers Big Sisters of New York City 40 Rector Street 11th Floor New York, New York 10006	\$50,000 00	Family
12/5/2017	South Bronx Educational Foundation Inc 843 Crotona Park North Bronx, New York 10460	\$30,000 00	Family
12/5/2017	Homeless Solutions, Inc. 6 Dumont Place, 3rd Floor Morristown, New Jersey 07960	\$10,000 00	Others
12/5/2017	Heridas Pero No Vencidas 514 E 163rd Street, Apt. 7B Bronx, New York 10451	\$5,000 00	Faith

WILLIAM E SIMON FOUNDATION			
EIN 13-6217788			
2017 FORM 990-PF			
12/5/2017	Garden State Initiative P O Box 9180 Morristown, New Jersey 07963	\$25,000 00	Others
12/5/2017	Saint John Church 1986 Post Road Darren, Connecticut 06820	\$500 00	Education
12/11/2017	Saint Hilary School 765 Hilary Drive Tiburon, California 94920	\$4,000 00	Education
12/11/2017	ViviendasLeon 1585 Folsom Street San Francisco, California 94013	\$5,000 00	Others
12/11/2017	DREAM 333 East 100th Street New York, New York 10029	\$7,500 00	Family
12/11/2017	JerseyCAN 11 Commerce Drive, Suite 310 Cranford, New Jersey 07016	\$5,000 00	Education
12/11/2017	Boston Winter Ball c/o KMC Productions, Inc 150 Wood Road, Suite 300 Braintree, Massachusetts 02184	\$5,000 00	Others
12/11/2017	Hayneville Baptist Church PO Box 367 Hayneville, Alabama 36040	\$100 00	Faith
12/11/2017	Follow Your Dream Foundation PO BOX 91 Ross, California 94957	\$1,000 00	Others
12/11/2017	Ladies Village Improvement Society of East Hampton, Inc 95 Main Street East Hampton, New York 11937	\$5,000 00	Others
12/11/2017	Raphael House 1065 Sutter Street San Francisco, California 94109	\$5,000 00	Others
12/11/2017	Becket Fund for Religious Liberty 1200 New Hampshire Avenue, NW Suite 700 Washington, District of Columbia 20036	\$25,000 00	Faith

WILLIAM E SIMON FOUNDATION

EIN 13-6217788

2017 FORM 990-PF

12/11/2017	Mercy Center 377 East 145th Street Bronx, New York 10454	\$25,000 00	Family
12/11/2017	Canal Alliance 91 Larkspur Street San Rafael, California 94901	\$5,000 00	Family
12/11/2017	P G Chambers School 15 Halko Drive Cedar Knolls, New Jersey 07927	\$2,500 00	Education
12/11/2017	Capital Research Center 1513 16th Street N W Washington, District of Columbia 20036-1401	\$5,000 00	Others
12/11/2017	Georgetown University 3307 M Street Suite 200 Washington, District of Columbia 20057	\$500 00	Education
12/11/2017	Church of Christ the King P.O. Box 368 Blue Mill Road New Vernon, New Jersey 07976	\$300 00	Faith
12/11/2017	Church of Christ the King P O Box 368 Blue Mill Road New Vernon, New Jersey 07976	\$300 00	Faith
12/11/2017	Church of Christ the King P O Box 368 Blue Mill Road New Vernon, New Jersey 07976	\$300 00	Faith
12/11/2017	Church of Christ the King P.O Box 368 Blue Mill Road New Vernon, New Jersey 07976	\$50 00	Faith
12/11/2017	Church of Christ the King P O Box 368 Blue Mill Road New Vernon, New Jersey 07976	\$300.00	Faith
12/11/2017	LAMP Ministries 2704 Schurz Avenue Bronx, New York 10465- 3173	\$7,500 00	Faith

WILLIAM E SIMON FOUNDATION			
EIN 13-6217788			
2017 FORM 990-PF			
12/11/2017	Good Grief 38 Elm Street Morristown, New Jersey 07960	\$5,000 00	Family
12/11/2017	Hyde Leadership Charter School 730 Bryant Avenue Bronx, New York 10474	\$7,500 00	Education
12/11/2017	Covenant House California 1325 North Western Avenue Hollywood, California 90027	\$5,000 00	Family
12/11/2017	OLC School 248 Luis Marin Blvd Jersey City, New Jersey 07302	\$12,500 00	Education
12/11/2017	Saint Joseph School 509 Pavonia Avenue Jersey City, New Jersey 07306	\$35,200 00	Education\Academic Enhancement
12/11/2017	Women for Women International 2000 M Street, NW Suite 200 Washington, District of Columbia 20036	\$8,581 00	Others
12/11/2017	Grace Church Van Vorst 39 Erie Street Jersey City, New Jersey 07302	\$15,000 00	Faith
12/11/2017	Mendham Borough Library 10 Hilltop Road Mendham, New Jersey 07945	\$250 00	Others
12/11/2017	Friends of the Children New York P O Box 1649 New York, New York 10026	\$15,000 00	Family
12/11/2017	Friends of Learning Community Charter School 2495 Kennedy Boulevard Jersey City, New Jersey 07304	\$40,000 00	Education
12/11/2017	Dollies Making A Difference 440 Toyopa Drive Pacific Palisades, California 90272	\$5,000 00	Others
12/11/2017	Dollies Making A Difference 440 Toyopa Drive Pacific Palisades, California 90272	\$250 00	Others

WILLIAM E SIMON FOUNDATION			
EIN 13-6217788			
2017 FORM 990-PF			
		\$8,571,862 50	

STATEMENT 12

William E. Simon Foundation
EIN 13-6217788
Grants Payable
12/31/2017

	<u>Totals</u>
Children's Scholarship Fund /	729,376
Community Foundation of New Jersey	127,237
Foundation for Morristown Medical Center	200,000
Manhattan Institute	35,000
Philanthropy Roundtable	540,000
Richard Nixon Foundation	500,000
Sound Body Sound Mind	165,000
Student Sponsor Partners	75,000
Tri-County Scholarship Fund	40,000
UCLA Foundation	20,000
Witherspoon Institute	<u>100,000</u>
Subtotal	2,531,613
Discounted Payable	<u>(44,677)</u>
Total Grants Payable	<u><u>2,486,936</u></u>