Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

OMB No 1545-0052

2017

Open to Public Inspection

For calendar year 2017, or tax year beginning 01-01-2017 , and ending 12-31-2017

Name of foundation
ROBERT & DALE ROSEN CHARITABLE FOUNDATION TR U/A 8/05/92

A Employer identification number
13-6997530

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

Room/suite

B Telephone number (see instructions)
(203) 625-3162

City or town, state or province, country, and ZIP or foreign postal code
GREENWICH, CT 06831

C If exemption application is pending, check here ▶ ☐

G Check all that apply ☐ Initial return ☐ Initial return of a former public charity
☐ Final return ☐ Amended return
☐ Address change ☐ Name change

D 1. Foreign organizations, check here ▶ ☐
2 Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

H Check type of organization ☑ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

E If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐

I Fair market value of all assets at end of year *(from Part II, col (c), line 16)*▶$ 124,862

J Accounting method ☑ Cash ☐ Accrual
☐ Other (specify) ________
(Part I, column (d) must be on cash basis)

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

Part I **Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))*

			(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1	Contributions, gifts, grants, etc , received (attach schedule)	133,159			
	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	1,014	1,014		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	8,919			
	b	Gross sales price for all assets on line 6a 149,976				
	7	Capital gain net income (from Part IV, line 2)		127,257		
	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	143,092	128,271		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	0	0		0
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)	3,250	3,250		0
	c	Other professional fees (attach schedule)				
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	900	0		0
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)	871	871		0
	24	**Total operating and administrative expenses.** Add lines 13 through 23	5,021	4,121		0
	25	Contributions, gifts, grants paid	111,064			111,064
	26	**Total expenses and disbursements.** Add lines 24 and 25	116,085	4,121		111,064
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	27,007			
	b	**Net investment income** (if negative, enter -0-)		124,150		
	c	**Adjusted net income**(if negative, enter -0-)				

Part II Balance Sheets

		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
Assets	1	Cash—non-interest-bearing	1,999	6,035	6,035
	2	Savings and temporary cash investments	6,893	47,867	47,867
	3	Accounts receivable ▶ Less allowance for doubtful accounts ▶			
	4	Pledges receivable ▶ Less allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ Less allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)			
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	61,952	49,949	70,960
	14	Land, buildings, and equipment basis ▶ Less accumulated depreciation (attach schedule) ▶			
	15	Other assets (describe ▶)	6,000	0	0
	16	**Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	76,844	103,851	124,862
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	**Total liabilities**(add lines 17 through 22)	0	0	
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.**			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☑ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds	0	0	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	76,844	103,851	
	30	**Total net assets or fund balances** (see instructions)	76,844	103,851	
	31	**Total liabilities and net assets/fund balances** (see instructions)	76,844	103,851	

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	76,844
2	Enter amount from Part I, line 27a	2	27,007
3	Other increases not included in line 2 (itemize) ▶	3	0
4	Add lines 1, 2, and 3	4	103,851
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	103,851

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1 a	15 SH EOG RES INC		2012-09-19	2017-05-11
b	850 SH ENTERPRISE PRODUCTS PARTNERS LP		2014-11-19	2017-12-31
c	800 SH AMERICAN EXPRESS CO		1994-09-02	2017-12-31
d	595 SH RECKITT BENCKISER GROUP		2003-03-07	2017-11-29
e	30 SH JOHNSON & JOHNSON		2007-04-16	2017-12-31

	(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	1,411		119	1,292
b	23,171		4,736	18,435
c	69,932		6,902	63,030
d	51,704		9,073	42,631
e	3,758		1,889	1,869

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

	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
a				1,292
b				18,435
c				63,030
d				42,631
e				1,869

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	127,257
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☑ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2016	102,996	109,030	0 944657
2015	164,760	117,638	1 400568
2014	106,976	182,355	0 586636
2013	70,058	220,299	0 318013
2012	61,388	148,558	0 413226

2	**Total** of line 1, column (d)	2	3 663100
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 732620
4	Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	4	101,089
5	Multiply line 4 by line 3	5	74,060
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	1,242
7	Add lines 5 and 6	7	75,302
8	Enter qualifying distributions from Part XII, line 4	8	111,064

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 ▶ ☐ 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	1,242
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	1,242
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	1,242
6	Credits/Payments				
a	2017 estimated tax payments and 2016 overpayment credited to 2017	6a	1,241		
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	0		
7	Total credits and payments Add lines 6a through 6d.			7	2,841
8	Enter any **penalty** for underpayment of estimated tax Check here ☐ 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	1,599
11	Enter the amount of line 10 to be **Credited to 2018 estimated tax** ▶ 1,599	**Refunded** ▶		11	0

Part VII-A Statements Regarding Activities

		Line	Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		No
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)?	1b		No
	*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?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year **(1)** On the foundation ▶ $ 0 **(2)** On foundation managers ▶ $ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ $ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities*	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*	3		No
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on **Form 990-T** for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If "Yes," attach the statement required by General Instruction T*	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If "Yes," complete Part II, col (c), and Part XV*	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ CT			
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*	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2017 or the taxable year beginning in 2017 (see instructions for Part XIV)? *If "Yes," complete Part XIV*	9		No
10	Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses*	10		No

Part VII-A Statements Regarding Activities (continued)

		Line	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)	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	

Website address ▶N/A

14 The books are in care of ▶TAXPAYER Telephone no ▶(203) 625-3162

Located at ▶67 PECKSLAND ROAD GREENWICH CT ZIP+4 ▶06831

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

		Line	Yes	No
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?	16		No
	See instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country ▶			

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? ☐ 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

		Line	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)?	1b		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
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		No

2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))

a At the end of tax year 2017, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2017? ☐ Yes ☑ No
If "Yes," list the years ▶ 20____ , 20____ , 20____ , 20____

		Line	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		

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

		Line	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		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2017?	4b		No

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

5a	During the year did the foundation pay or incur any amount to				
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ 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		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐				
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	☐ 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		No
	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, 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
ROBERT L ROSEN 67 PECKSLAND ROAD GREENWICH, CT 06831	TRUSTEE 0 50	0	0	0
DALE A ROSEN 67 PECKSLAND ROAD GREENWICH, CT 06831	TRUSTEE 0 50	0	0	0

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

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

Total number of other employees paid over $50,000. . . . . ▶ 0

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

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over $50,000 for professional services. . . . . ▶ 0

Part IX-A Summary of Direct Charitable Activities

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

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

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	89,556
b	Average of monthly cash balances.	1b	13,072
c	Fair market value of all other assets (see instructions).	1c	0
d	**Total** (add lines 1a, b, and c).	1d	102,628
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	102,628
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	1,539
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	101,089
6	**Minimum investment return.** Enter 5% of line 5.	6	5,054

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	5,054
2a	Tax on investment income for 2017 from Part VI, line 5. 2a 1,242		
b	Income tax for 2017 (This does not include the tax from Part VI). 2b		
c	Add lines 2a and 2b.	2c	1,242
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	3,812
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	3,812
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	3,812

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	111,064
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	111,064
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	1,242
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4.	6	109,822

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					3,812
2 Undistributed income, if any, as of the end of 2017					
a Enter amount for 2016 only.				0	
b Total for prior years 20___ , 20___ , 20___			0		
3 Excess distributions carryover, if any, to 2017					
a From 2012.	55,017				
b From 2013.	59,508				
c From 2014.	99,636				
d From 2015.	161,482				
e From 2016.	99,806				
f **Total** of lines 3a through e.		475,449			
4 Qualifying distributions for 2017 from Part XII, line 4 ▶ $ 111,064					
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.					3,812
e Remaining amount distributed out of corpus		107,252			
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		582,701			
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 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)		0			
8 Excess distributions carryover from 2012 not applied on line 5 or line 7 (see instructions) . . .		55,017			
9 **Excess distributions carryover to 2018.** Subtract lines 7 and 8 from line 6a		527,684			
10 Analysis of line 9					
a Excess from 2013. . . .	59,508				
b Excess from 2014. . . .	99,636				
c Excess from 2015. . . .	161,482				
d Excess from 2016. . . .	99,806				
e Excess from 2017. . . .	107,252				

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

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

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

	Tax year	Prior 3 years			(e) Total
	(a) 2017	**(b)** 2016	**(c)** 2015	**(d)** 2014	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon **a** "Assets" alternative test—enter **(1)** Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test—enter **(1)** Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 Information Regarding Foundation Managers:

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

See Additional Data Table

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

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

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

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

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

c Any submission deadlines

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

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 Additional Data Table				
Total . . . . ▶ **3a**				111,064
b *Approved for future payment*				
Total . . . . ▶ **3b**				0

Part XVI-A Analysis of Income-Producing Activities

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. . . .			14	1,014	
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			18	8,919	
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		9,933	0

13 Total. Add line 12, columns (b), (d), and (e). **13** 9,933

(See worksheet in line 13 instructions to verify calculations)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)

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

		Yes	No
1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501 (c) of the Code (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(1)		No
(2) Other assets.	1a(2)		No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization.	1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization.	1b(2)		No
(3) Rental of facilities, equipment, or other assets.	1b(3)		No
(4) Reimbursement arrangements.	1b(4)		No
(5) Loans or loan guarantees.	1b(5)		No
(6) Performance of services or membership or fundraising solicitations.	1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c		No

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

(a) Line No	**(b)** Amount involved	**(c)** Name of noncharitable exempt organization	**(d)** Description of transfers, transactions, and sharing arrangements

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

b If "Yes," complete the following schedule

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

Sign Here

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, correct, and complete Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge

******	2018-06-25	******
Signature of officer or trustee	Date	Title

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

Paid Preparer Use Only

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ▶ ☐	PTIN
ALAN G BADEY CPA				P00666263
Firm's name ▶ CITRIN COOPERMAN & COMPANY LLP				Firm's EIN ▶22-2428965
Firm's address ▶ 709 WESTCHESTER AVENUE WHITE PLAINS, NY 10604				Phone no (914) 949-2990

Form 990PF Part XV Line 1a - List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than $5,000).

ROBERT L ROSEN
DALE A ROSEN

Form 990PF Part XV Line 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*				
ADL605 THIRD AVE NEW YORK, NY 10158	NONE	PC	TO STOP DEFAMATION OF THE JEWISH PEOPLE	8,300
ALZHEIMER FOUNDATION 322 EIGHTH AVE 7TH FLOOR NEW YORK, NY 10001	NONE	PUBLIC	TO PROVIDE OPTIMAL CARE AND SERVICES TO INDIVIDUALS CONFRONTING DEMENTIA AND ALSO TO THEIR CAREGIVERS AND FAMILIES	100
AMERICAN CANCER SOCIETY NEW ENGLAND DIVISION INC / LOWER FAIRFIELD UNIT PO BOX 907 WALLINGFORD, CT 06492	NONE	PC	TO SUPPORT THE MISSION TO ELIMINATE CANCER	200
AMERICAN HEART ASSOCIATION 205 E 42ND STREET NEW YORK, NY 10017	NONE	PUBLIC	TO FIGHT CARDIOVASCULAR DISEASES AND STROKE	250
ARF (ANIMAL RESCUE FOUNDATION) PO BOX 30215 WALNUT CREEK, CA 94598	NONE	PUBLIC	RESCUING AND ADOPTING ANIMALS	200
Total . . . . ▶ **3a**				111,064

Form 990PF Part XV Line 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*				
BREAST CANCER ALLIANCE 48 MAPLE AVENUE GREENWICH, CT 06830	NONE	PC	BREAST CANCER RESEARCH	500
CHILTON MEMORIAL HOSPITAL 97 WEST PKWY POMPTON PLAINS, NJ 07444	NONE	PUBLIC	TO ASSIST WITH THE MISSION OF DESIGNING AND DELIVERING HIGH QUALITY, INNOVATIVE AND PERSONALIZED HEALTH CARE, TO BUILD HEALTHIER COMMUNITIES AND IMPROVE LIVES FOR PATIENTS, CONSUMERS, AND CAREGIVERS	100
CONGREGATION BETH-EL593 PARK AVE NEW YORK, NY 10065	NONE	PUBLIC	TO SUPPORT A CONSERVATIVE, EGALITARIAN, SPIRITUAL COMMUNITY THAT CHALLENGES ITSELF TO SANCTIFY EACH DAY THROUGH PRAYER, ACTION, STUDY, AND MITZVOT	1,000
COUNCIL ON FOREIGN RELATIONS INC 58 EAST 68TH STREET NEW YORK, NY 10065	NONE	PC	TO ASSIST WITH EFFORTS TO RAISE THE LEVEL OF FOREIGN AWARENESS	8,900
CROHN'S & COLITIS FOUNDATION 733 THIRD AVENUE SUITE 510 NEW YORK, NY 10017	NONE	PC	TO CURE CROHN'S DISEASE AND ULCERATIVE COLITIS, AND TO IMPROVE THE QUALITY OF LIFE OF CHILDREN AND ADULTS AFFECTED BY THESE DISEASES	1,000
Total . . . . ▶ **3a**				111,064

Form 990PF Part XV Line 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*				
CYCLE FOR SURVIVAL885 2ND AVENUE NEW YORK, NY 10017	NONE	PUBLIC	TO SUPPORT THE MOVEMENT TO BEAT RARE CANCERS THROUGH A TEAM EVENT OF INDOOR CYCLING EVENTS THE TEAM CYCLING EVENTS PROVIDE A WAY TO FIGHT BACK AS 100% OF ALL MONEY RAISED DIRECTLY FUNDS LIFESAVING RARE CANCER RESEARCH	250
FAMILY EQUALITY COUNCIL 475 PARK AVE 2 2100 NEW YORK, NY 10016	NONE	PUBLIC	TO SUPPORT THE COUNCIL WHICH CONNECTS, SUPPORTS, AND REPRESENTS THE THREE MILLION PARENTS WHO ARE LESBIAN, GAY, BISEXUAL, TRANSGENDER AND QUEER IN THIS COUNTRY AND THEIR SIX MILLION CHILDREN	500
GREENWICH LIBRARY 101 WEST PUTNAM AVENUE GREENWICH, CT 06830	NONE	PUBLIC	TO SUPPORT THE TOWN LIBRARY WITH FUNDS	100
HOSPITAL FOR SPECIAL SURGERY 535 E 70TH STREE NEW YORK, NY 10021	NONE	PC	SUPPORTING DR FARMER'S RESEARCH IN ORTHOPEDIC SPINE CONDITIONS	1,000
HUMAN RIGHTS FIRST 333 SEVENTH AVENUE 13TH FLOOR NEW YORK, NY 10001	NONE	PC	INDEPENDENT ADVOCACY AND ACTION ORGANIZATION THAT CHALLENGES AMERICA TO LIVE UP TO ITS IDEALS	250
Total . . . . ▶ **3a**				111,064

Form 990PF Part XV Line 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				
ISGAP165 E 56TH STREET 2ND FLOOR MANHATTAN, NY 10022	NONE	PUBLIC	TO SUPPORT THE SCHOLARLY RESEARCH OF THE ORGANIZATION INTO THE ORIGINS, PROCESSES, AND MANIFESTATIONS OF GLOBAL ANTISEMITISM AND OF OTHER FORMS OF PREJUDICE, INCLUDING VARIOUS FORMS OF RACISM, AS THEY RELATE TO POLICY IN AN AGE OF GLOBALIZATION	5,000
JEWISH FEDERATION OF GREENWICH ONE HOLLY HILL LANE GREENWICH, CT 06830	NONE	PUBLIC	TO SUPPORT AND STRENGTHEN THE JEWISH COMMUNITY HERE	3,380
JUMPSTART FOR YOUNG CHILDREN 308 CONGRESS STREET 6TH FLOOR BOSTON, MA 02210	NONE	PC	HELP CHILDREN DEVELOP LANGUAGE AND LITERACY SKILLS	1,000
MANHATTAN SCHOOL OF MUSIC 120 CLAREMONT AVE NEW YORK, NY 10027	NONE	PUBLIC	UNRESTRICTED	250
MSKCC1275 YORK AVENUE NEW YORK, NY 10065	NONE	PUBLIC	TO PROVIDE EXCEPTIONAL PATIENT CARE, INNOVATIVE RESEARCH, AND OUTSTANDING EDUCATIONAL PROGRAM IN THE FIGHT AGAINST CANCER	500
Total . . . . ▶ **3a**				111,064

Form 990PF Part XV Line 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*				
MT SINAI MEDICAL CENTER FOUNDATION 4300 ALTON ROAD MIAMI BEACH, FL 33140	NONE	PC	TO SUPPORT A NOT-FOR-PROFIT HOSPITAL WHERE JEWISH PHYSICIANS CAN PRACTICE MEDICINE AND ALL PERSONS REGARDLESS OF "RACE, CREED OR COLOR" COULD RECEIVE HIGH QUALITY MEDICAL CARE TO MEET THE PUBLIC'S EXPECTATION FOR QUALITY MEDICINE, REGARDLESS OF A PATIENT'S ABILITY TO PAY, MOUNT SINAI MEDICAL CENTER FOUNDATION PRESERVES THE HOSPITAL'S RICH TRADITION OF PHILANTHROPY AND COMMUNITY SUPPORT	5,000
MUSIC CONSERVATORY OF WESTCHESTER 216 CENTRAL AVENUE WHITE PLAINS, NY 10601	NONE	PUBLIC	TO SUPPORT THE LARGEST MUSIC ORGANIZATION IN THE WESTCHESTER, NY REGION, SERVING 2,500 STUDENTS EACH YEAR 800 WHO ATTEND LESSONS AND CLASSES AND 1,700 WHO PARTICIPATE IN OUTREACH PROGRAMS	250
NEW YORK CITY BALLET 20 LINCOLN CENTER FOR THE PERFORMIN ARTS NEW YORK, NY 10023	NONE	PUBLIC	TO HELP SUPPORT THE COMPANY'S EXCELLENCE, LAUNCH NEW WORKS, AND KEEP PERFORMANCES AFFORDABLE AND ACCESSIBLE FOR NEW AUDIENCES	250
NEW YORK PHILHARMONIC AVERY FISHER HALL 10 LINCOLN CENTER PLAZA NEW YORK, NY 10023	NONE	PC	TO SUPPORT EDUCATIONAL PROGRAMS	5,000
NEW YORK UNIVERSITY 25 WEST FOURTH STREET 4TH FLOOR NEW YORK, NY 10012	NONE	PUBLIC	TO RAISE MONEY FOR SCHOLARSHIPS FOR DESERVING STUDENTS, TO PROVIDE FACULTY WITH THE RESOURCES NEEDED TO PERFORM CRITICAL RESEARCH, TO PROVIDE MEDICAL AND NURSING STUDENTS WITH ACCESS TO THE MOST UP TO DATE EQUIPMENT AND TECHNOLOGY	25,000
Total . . . . ▶ 3a				111,064

Form 990PF Part XV Line 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*				
NYU LANGONE MEDICAL CENTER 1 PARK AVENUE 17TH FLOOR NEW YORK, NY 10016	NONE	PUBLIC	TO ENHANCE CLINICAL AND SUPPORTIVE CARE FOR CHILDREN AND FAMILIES, FUND RESEARCH INTO CHILDHOOD ILLNESSES, AND PROMOTE A NURTURING ENVIRONMENT THAT ENABLES CHILDREN TO BE CHILDREN	1,500
PAN MASS CHALLENGE77 4TH AVENUE NEEDHAM, MA 02494	NONE	PC	TO RAISE MONEY FOR LIFE-SAVING CANCER RESEARCH AND TREATMENT AT DANA-FARBER CANCER INSTITUTE THROUGH AN ANNUAL BIKE-A-THON THAT CROSSES THE COMMONWEALTH OF MASSACHUSETTS	250
PLANNED PARENTHOOD 123 WILLIAM ST 10TH FLOOR NEW YORK, NY 10038	NONE	PUBLIC	TO SUPPORT THE MISSION WHICH IS TO PROVIDE COMPREHENSIVE REPRODUCTIVE AND COMPLEMENTARY HEALTH CARE SERVICES IN SETTINGS WHICH PRESERVE AND PROTECT THE ESSENTIAL PRIVACY AND RIGHTS OF EACH INDIVIDUAL,TO ADVOCATE PUBLIC POLICIES WHICH GUARANTEE THESE RIGHTS AND ENSURE ACCESS TO SUCH SERVICES, TO PROVIDE EDUCATIONAL PROGRAMS WHICH ENHANCE UNDERSTANDING OF INDIVIDUAL AND SOCIETAL IMPLICATIONS OF HUMAN SEXUALITY, ANDTO PROMOTE RESEARCH AND THE ADVANCEMENT OF TECHNOLOGY IN REPRODUCTIVE HEALTH CARE AND ENCOURAGE UNDERSTANDING OF THEIR INHERENT BIOETHICAL, BEHAVIORAL, AND SOCIAL IMPLICATIONS	250
RIVERDALE YMCA5625 ARLINGTON AVE BRONX, NY 10471	NONE	PUBLIC	TO SUPPORT THEIR PROGRAMS WHICH ENRICHES THE LIVES OF EVERYONE IN RIVERDALE WITH EDUCATIONAL, RECREATIONAL, CULTURAL, AND WELLNESS PROGRAMS, THROUGH THE LENS OF UNIVERSALLY-SHARED VALUES CENTRAL TO JEWISH LIFE	100
TEACHERS COLLEGE FUND BOX 306 525 W 120TH STREET NEW YORK, NY 10027	NONE	PC	TO PROVIDE SUPPORT FOR SCHOLARSHIPS FOR DESERVING STUDENTS, FACULTY DEVELOPMENT AND RESEARCH, FACULTY RECRUITMENT, TECHNOLOGICAL INNOVATIONS AND EDUCATION PROGRAMS	10,000
Total . . . . ▶ **3a**				111,064

Form 990PF Part XV Line 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*				
TEMPLE SHOLOM 300 EAST PUTNAM AVENUE GREENWICH, CT 06830	NONE	PC	SUPPORT THE TEMPLE AND ITS PROGRAMS	23,534
THE INSTITUTE FOR MYELOMA & BONE CANCER RESEARCH 9201 SUNSET BLVD SUITE 300 WEST HOLLYWOOD, CA 90069	NONE	PUBLIC	TO SUPPORT THE NON-PROFIT CANCER RESEARCH INSTITUTE THAT IS DEDICATED TO MORE EFFECTIVE TREATMENT, AND ULTIMATELY A CURE, FOR MYELOMA AND BONE CANCER TO SUPPORT THEIR INNOVATIVE RESEARCH WHICH PROVIDES CANCER PATIENTS WITH GREATER LONGEVITY AND AN IMPROVED QUALITY OF LIFE	100
THE JEWISH FEDERATION 25 BROADWAY 17TH FLOOR NEW YORK, NY 10004	NONE	PUBLIC	TO SUPPORT THEIR PROGRAMS WHICH IDENTIFY AND MEET THE NEEDS OF NEW YORKERS AND JEWS THROUGH THE POWER OF COLLECTIVE ACTION TOGETHER, THEY CARE FOR PEOPLE IN NEED, RESPOND TO CRISES CLOSE TO HOME AND FAR AWAY, AND SHAPE THE JEWISH FUTURE	250
WORLD OF CHILDREN 6200 STONERIDGE MALL ROAD 3RD FLOOR PLEASANTON, CA 94588	NONE	PC	PROVIDES FUNDING AND RECOGNITION TO SUPPORT LIFE-CHANGING WORK FOR CHILDREN	1,000
YWCA OF GREENWICH 259 EAST PUTNAM AVENUE GREENWICH, CT 06830	NONE	PUBLIC	TO ENHANCE THE LIVES OF WOMEN, MEN, AND CHILDREN WITH A VARIETY OF PROGRAMS	5,800
Total . . . . ▶ **3a**				111,064

TY 2017 Accounting Fees Schedule

Name: ROBERT & DALE ROSEN CHARITABLE FOUNDATION TR U/A 8/05/92

EIN: 13-6997530

Accounting Fees Schedule

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PROFESSIONAL FEES	3,250	3,250		0

TY 2017 Investments - Other Schedule

Name: ROBERT & DALE ROSEN CHARITABLE FOUNDATION TR U/A 8/05/92

EIN: 13-6997530

Investments Other Schedule 2

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
55 JOHNSON & JOHNSON	AT COST	4,031	7,685
20 REGENERON PHARMACEUTICALS	AT COST	3,101	7,519
85 EOG RESOURCES INC	AT COST	4,872	9,172
45 GILEAD SCIENCES INC	AT COST	4,583	3,224
350 ENTERPRISE PRODUCTS PARTNERS LP	AT COST	7,252	9,279
100 BRISTOL MYERS SQUIBB	AT COST	7,244	6,128
75 LIONS GATE ENTERTAINMENT CORP NON-VOTING CL B	AT COST	1,566	2,380
75 LIONS GATE ENTERTAINMENT CORP VOTING CL A	AT COST	1,620	2,536
150 DISCOVERY COMMUNICATIONS INC SER C	AT COST	0	3,175
200 AMERICAN EXPRESS CO	AT COST	15,680	19,862

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TY 2017 Other Assets Schedule

Name: ROBERT & DALE ROSEN CHARITABLE FOUNDATION TR U/A 8/05/92

EIN: 13-6997530

Other Assets Schedule

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
MISCELLANEOUS RECEIVABLE	6,000	0	0

TY 2017 Other Expenses Schedule

Name: ROBERT & DALE ROSEN CHARITABLE FOUNDATION TR U/A 8/05/92

EIN: 13-6997530

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT FEES	871	871		0

TY 2017 Taxes Schedule

Name: ROBERT & DALE ROSEN CHARITABLE FOUNDATION TR U/A 8/05/92

EIN: 13-6997530

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL TAX	900	0		0

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

Schedule of Contributors

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

OMB No 1545-0047

2017

Name of the organization	Employer identification number
ROBERT & DALE ROSEN CHARITABLE FOUNDATION TR U/A 8/05/92	13-6997530

Organization type (check one)

Filers of: **Section:**

Form 990 or 990-EZ
- ☐ 501(c)( ) (enter number) organization
- ☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
- ☐ 527 political organization

Form 990-PF
- ☑ 501(c)(3) exempt private foundation
- ☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
- ☐ 501(c)(3) taxable private foundation

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

General Rule

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

Special Rules

☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than $1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals Complete Parts I, II, and III

☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc , purposes, but no such contributions totaled more than $1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc , contributions totaling $5,000 or more during the year . . . . ▶ $ ____________

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

Name of organization
ROBERT & DALE ROSEN CHARITABLE
FOUNDATION TR U/A 8/05/92

Employer identification number
13-6997530

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	ROBERT L ROSEN AND DALE ATKINS ROSEN 67 PECKSLAND RD GREENWICH, CT06831	$ 78,400	Person ☐ Payroll ☐ Noncash ☑ (Complete Part II for noncash contributions)
2	RLR CAPITAL PARTNERS LP 245 PARK AVENUE NEW YORK, NY10167	$ 3,250	Person ☑ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
3	ROBERT L ROSEN AND DALE ATKINS ROSEN 67 PECKSLAND RD GREENWICH, CT06831	$ 51,509	Person ☐ Payroll ☐ Noncash ☑ (Complete Part II for noncash contributions)
-		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
-		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Name of organization	Employer identification number
ROBERT & DALE ROSEN CHARITABLE FOUNDATION TR U/A 8/05/92	13-6997530

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

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	1000 SHARES OF AMERICAN EXPRESS COMPANY	$ 78,400	2017-05-10

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
3	595 SHARES OF RECKITT BENCKISER GROUP	$ 51,509	2017-11-24

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		$	

Name of organization	Employer identification number
ROBERT & DALE ROSEN CHARITABLE FOUNDATION TR U/A 8/05/92	13-6997530

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

Use duplicate copies of Part III if additional space is needed

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

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

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

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