

C&E  
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Form 990-PF

Department of the Treasury  
Internal Revenue Service

EXTENDED TO NOVEMBER 15, 2018

2949120201204 8

OMB No 1545-0052

2017

Open to Public Inspection

For calendar year 2017 or tax year beginning

, and ending

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

Name of foundation

NEIL JANE WILLIAM ESTELLE GOLUB FAMILY FOUNDATION, INC.

A Employer identification number

22-2809785

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

Room/suite

461 NOTT STREET

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

SCHENECTADY, NY 12308

C If exemption application is pending check here ► 

6

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

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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		668,879.	366,851.	366,851.
	2 Savings and temporary cash investments				
	3 Accounts receivable ►				
	Less allowance for doubtful accounts ►				
	4 Pledges receivable ►				
	Less allowance for doubtful accounts ►				
	5 Grants receivable				
	6 Receivables due from officers, directors, trustees, and other disqualified persons				
	7 Other notes and loans receivable ►				
	Less allowance for doubtful accounts ►				
	8 Inventories for sale or use				
	9 Prepaid expenses and deferred charges			3,311.	
	10a Investments - U S and state government obligations				
	b Investments - corporate stock	STMT 9	10,991,239.	11,702,657.	16,711,981.
	c Investments - corporate bonds				
	11 Investments - land, buildings, and equipment basis ►				
	Less accumulated depreciation ►				
	12 Investments - mortgage loans				
	13 Investments - other	STMT 10	790,190.	859,008.	1,065,655.
	14 Land, buildings, and equipment basis ►				
	Less accumulated depreciation ►				
	15 Other assets (describe ► INCOME RECEIVABLE )		1,659.	0.	0.
	16 Total assets (to be completed by all filers - see the instructions Also, see page 1, item I)		12,451,967.	12,931,827.	18,183,087.
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				
	22 Other liabilities (describe ► )				
	23 Total liabilities (add lines 17 through 22)		0.	0.	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ► <input type="checkbox"/>	and complete lines 24 through 26, and lines 30 and 31			
	24 Unrestricted				
	25 Temporarily restricted				
	26 Permanently restricted				
	Foundations that do not follow SFAS 117, check here ► <input checked="" type="checkbox"/>	and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds		12,451,967.	12,931,827.	
	28 Paid-in or capital surplus, or land, bldg , and equipment fund		0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds		0.	0.	
	30 Total net assets or fund balances		12,451,967.	12,931,827.	
	31 Total liabilities and net assets/fund balances		12,451,967.	12,931,827.	

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 12,451,967.
2 Enter amount from Part I, line 27a	2 479,860.
3 Other increases not included in line 2 (itemize) ►	3 0.
4 Add lines 1, 2, and 3	4 12,931,827.
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 12,931,827.

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**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					
b	SEE ATTACHED STATEMENTS				
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					
b					
c					
d					
e	6,268,701.	5,156,048.	1,112,653.		
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(I) 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					
b					
c					
d					
e					1,112,653.
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	1,112,653.	
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	1,381,388.	17,215,799.	.080240
2015	1,272,082.	18,748,412.	.067850
2014	1,459,692.	19,614,054.	.074421
2013	1,258,403.	20,244,078.	.062162
2012	1,402,477.	19,514,489.	.071868

2 Total of line 1, column (d)

2 .356541

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 .071308

4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5

4 19,065,992.

5 Multiply line 4 by line 3

5 1,359,558.

6 Enter 1% of net investment income (1% of Part I, line 27b)

6 13,754.

7 Add lines 5 and 6

7 1,373,312.

8 Enter qualifying distributions from Part XII, line 4

8 2,380,675.

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

3  
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**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)	1	13,754.
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ► <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		
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	13,754.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only, others, enter -0-)	4	0.
5	<b>Tax based on investment income.</b> Subtract line 4 from line 3 If zero or less, enter -0-	5	13,754.
6	<b>Credits/Payments</b>		
a	2017 estimated tax payments and 2016 overpayment credited to 2017	6a	12,094.
b	Exempt foreign organizations - tax withheld at source	6b	0.
c	Tax paid with application for extension of time to file (Form 8868)	6c	5,000.
d	Backup withholding erroneously withheld	6d	0.
7	Total credits and payments Add lines 6a through 6d	7	17,094.
8	Enter any <b>penalty</b> for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached	8	29.
9	Tax due If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b>	9	
10	<b>Overpayment</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b>	10	3,311.
11	Enter the amount of line 10 to be <b>Credited to 2018 estimated tax</b> ►	11	0.

**Part VII-A Statements Regarding Activities**

		Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	X
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities	1b	X
c	Did the foundation file <b>Form 1120-POL</b> for this year?	1c	X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation ► \$ <u>0.</u> (2) On foundation managers ► \$ <u>0.</u>		
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ► \$ <u>0.</u>		
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	X
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	X
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	X
b	If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year?	4b	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by <i>General Instruction T</i>	5	X
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	X
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	X
8a	Enter the states to which the foundation reports or with which it is registered. See instructions. ► <b>DE</b>	8a	
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 <i>General Instruction G</i> ? If "No," attach explanation	8b	X
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2017 or the tax year beginning in 2017? See the instructions for Part XIV. If "Yes," complete Part XIV	9	X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10	X

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**Part VII-A Statements Regarding Activities (continued)**

	<b>Yes</b>	<b>No</b>
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	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	12	X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <b>N/A</b>	13	X
14 The books are in care of ► <b>JENNIFER KENNEALLY</b> Located at ► <b>461 NOTT STREET, SCHENECTADY, NY</b>	Telephone no ► 5183791863 ZIP+4 ► 12308	
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	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 ►	16	X

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

	<b>Yes</b>	<b>No</b>
<b>File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.</b>		
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	X No
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes	X No
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes	X No
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes	X 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	X 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	X 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	N/A	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	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?	<input type="checkbox"/> Yes	X No
If "Yes," list the years ► _____, _____, _____, _____		
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	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 ► _____, _____, _____, _____		
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	X 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	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2017?	4b	X

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

5a During the year, did the foundation pay or incur any amount to	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	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>b</b> If any answer is "Yes" to 5a(1)-(5), did <b>any</b> 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	N/A		
Organizations relying on a current notice regarding disaster assistance, check here	► <input type="checkbox"/>		
<b>c</b> 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?	N/A	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If "Yes," attach the statement required by Regulations section 53.4945-5(d)			
<b>6a</b> 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>b</b> Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
If "Yes" to 6b, file Form 8870			
<b>7a</b> 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>b</b> If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	N/A		

**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
NEIL M. GOLUB 461 NOTT STREET SCHENECTADY, NY 12308	PRESIDENT - AS NEEDED 0.00	0.	0.	0.
JANE GOLUB 461 NOTT STREET SCHENECTADY, NY 12308	TRUSTEE - AS NEEDED 0.00	0.	0.	0.
MONA GOLUB 461 NOTT STREET SCHENECTADY, NY 12308	SECRETARY - AS NEEDED 0.00	0.	0.	0.

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
NONE				

Total number of other employees paid over \$50,000

► 0

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**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
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	
SEE STATEMENT 11	0.
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	
2	
3	
All other program-related investments See instructions	
4	
<b>Total. Add lines 1 through 3</b> ► 0.	

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**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	17,963,293.
b	Average of monthly cash balances	1b	408,321.
c	Fair market value of all other assets	1c	984,723.
d	<b>Total</b> (add lines 1a, b, and c)	1d	19,356,337.
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	19,356,337.
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	290,345.
5	<b>Net value of noncharitable-use assets</b> Subtract line 4 from line 3 Enter here and on Part V, line 4	5	19,065,992.
6	<b>Minimum investment return</b> Enter 5% of line 5	6	953,300.

**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	953,300.
2a	Tax on investment income for 2017 from Part VI, line 5	2a	13,754.
b	Income tax for 2017. (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	13,754.
3	Distributable amount before adjustments Subtract line 2c from line 1	3	939,546.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	939,546.
6	Deduction from distributable amount (see instructions)	6	0.
7	<b>Distributable amount as adjusted</b> Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	939,546.

**Part XII Qualifying Distributions** (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes*	1a	2,380,675.
a	Expenses, contributions, gifts, etc - total from Part I, column (d), line 26	1b	0.
b	Program-related investments - total from Part IX-B	2	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	3a	
3	Amounts set aside for specific charitable projects that satisfy the	3b	
a	Suitability test (prior IRS approval required)	4	2,380,675.
b	Cash distribution test (attach the required schedule)	5	13,754.
4	<b>Qualifying distributions</b> Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	6	2,366,921.
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		
6	<b>Adjusted qualifying distributions</b> Subtract line 5 from line 4		

**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

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**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				939,546.
2 Undistributed income, if any, as of the end of 2017			0.	
a Enter amount for 2016 only				
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2017.				
a From 2012	443,889.			
b From 2013	264,237.			
c From 2014	505,149.			
d From 2015	360,011.			
e From 2016	526,680.			
f Total of lines 3a through e	2,099,966.			
4 Qualifying distributions for 2017 from Part XII, line 4 ► \$	2,380,675.			
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				939,546.
e Remaining amount distributed out of corpus	1,441,129.			
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:	3,541,095.			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5			0.	
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) 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	443,889.			
9 Excess distributions carryover to 2018 Subtract lines 7 and 8 from line 6a	3,097,206.			
10 Analysis of line 9				
a Excess from 2013	264,237.			
b Excess from 2014	505,149.			
c Excess from 2015	360,011.			
d Excess from 2016	526,680.			
e Excess from 2017	1,441,129.			

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

N/A

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



4942(j)(3) or  4942(j)(5)

b Check box to indicate whether the foundation is a private operating foundation described in section

2 a 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)(ii)

(3) Largest amount of support from an exempt organization

(4) Gross investment income

**Part XV: Supplementary Information (Complete this part only if the foundation 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) )

NONE

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.

NONE

**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., 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

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**Part XV. Supplementary Information (continued)**

**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<i>a Paid during the year</i>				
15 LOVE - DENISE MCCOY LEGACY AWARD - WNA	N/A	PUBLIC	UNRESTRICTED	
ALBANY, NY				250.
ADIRONDACK LAND TRUST 2017 GIFT	N/A	PUBLIC	UNRESTRICTED	
KEENE, NY				500.
ADL/A WORLD OF DIFFERENCE INSTITUTE	N/A	PUBLIC	UNRESTRICTED	
ALBANY, NY				30,000.
ADL/A WORLD OF DIFFERENCE INSTITUTE	N/A	PUBLIC	UNRESTRICTED	
ALBANY, NY				30,000.
ADL/A WORLD OF DIFFERENCE INSTITUTE	N/A	PUBLIC	UNRESTRICTED	
ALBANY, NY				45,000.
<b>Total</b>	<b>SEE CONTINUATION SHEET(S)</b>			► 3a <b>2,380,675.</b>
<i>b Approved for future payment</i>				
NONE				
<b>Total</b>				► 3b <b>0.</b>

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**Part XVI-A Analysis of Income-Producing Activities**

Enter gross amounts unless otherwise indicated.

**1 Program service revenue**

a \_\_\_\_\_  
b \_\_\_\_\_  
c \_\_\_\_\_  
d \_\_\_\_\_  
e \_\_\_\_\_  
f \_\_\_\_\_

g Fees and contracts from government agencies

**2 Membership dues and assessments**

**3 Interest on savings and temporary cash investments**

14 1,170.

**4 Dividends and interest from securities**

14 414,798.

**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**

14 96.

**7 Other investment income**

18 1,112,653.

**8 Gain or (loss) from sales of assets other than inventory**

**9 Net income or (loss) from special events**

**10 Gross profit or (loss) from sales of inventory**

**11 Other revenue**

a \_\_\_\_\_  
b \_\_\_\_\_  
c \_\_\_\_\_  
d \_\_\_\_\_  
e \_\_\_\_\_

**12 Subtotal Add columns (b), (d), and (e)**

0. 1,528,717. 0.

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

13 1,528,717.

(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)

**N/A** **NONE APPLICABLE**

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

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

a Transfers from the reporting foundation to a noncharitable exempt organization of:

- (1) Cash
- (2) Other assets

- b** Other transactions:
  - (1) Sales of assets to a noncharitable exempt organization
  - (2) Purchases of assets from a noncharitable exempt organization
  - (3) Rental of facilities, equipment, or other assets
  - (4) Reimbursement arrangements
  - (5) Loans or loan guarantees
  - (6) Performance of services or membership or fundraising solicitations

c Sharing of facilities, equipment, mailing lists, other assets, or paid employees

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.

**2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (other than section 501(c)(3)) or in section 527?

Yes  No

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

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

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

Signature of officer or trustee

Date \_\_\_\_\_

on of which preparer has any know-  
**PRESIDENT &**

► **TREASURER**

May the IRS discuss this return with the preparer shown below? See instr.

Signature of filer or trustee		Date	File No.			
<b>Paid Preparer Use Only</b>	Print/Type preparer's name		Preparer's signature	Date	Check <input type="checkbox"/> if self-employed	PTIN
	CHRISTINE OLIVER		Christine Oliver	07/09/18	P01275316	
	Firm's name ► TEAL, BECKER & CHIARAMONTE CPAS PC				Firm's EIN ► 14-1624930	
	Firm's address ► 7 WASHINGTON SQUARE ALBANY, NY 12205				Phone no. 518-456-6663	

## Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse, or common stock, 200 shs. MLC Co		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr)	(d) Date sold (mo., day, yr)
1a KARPUS US BANK #9130 ST			VARIOUS	VARIOUS
b KARPUS US BANK #9130 LT			VARIOUS	VARIOUS
c GOLDMAN SACHS #6987-9 ST			VARIOUS	VARIOUS
d GOLDMAN SACHS #6987-9 LT			VARIOUS	VARIOUS
e GOLDMAN SACHS #6988-7 ST			VARIOUS	VARIOUS
f GOLDMAN SACHS #6988-7 LT			VARIOUS	VARIOUS
g GOLDMAN SACHS #6989-5 LT			VARIOUS	VARIOUS
h GOLDMAN SACHS #6990-3 ST			VARIOUS	VARIOUS
i GOLDMAN SACHS #6990-3 LT			VARIOUS	VARIOUS
j GOLDMAN SACHS #6928-1 ST			VARIOUS	VARIOUS
k GOLDMAN SACHS #6928-1 LT			VARIOUS	VARIOUS
l MERRILL LYNCH #4F93 ST			VARIOUS	VARIOUS
m MERRILL LYNCH #4F93 LT			VARIOUS	VARIOUS
n FENIMORE CHARLES SCHWAB #8668 LT			VARIOUS	VARIOUS
o WELLS FARGO #3478 ST			VARIOUS	VARIOUS
(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 34,719.			5,971.	28,748.
b 4,705,220.			4,054,668.	650,552.
c 3,618.			3,644.	-26.
d 234,079.			165,808.	68,271.
e 7,366.			6,628.	738.
f 38,851.			27,251.	11,600.
g 12,209.			12,836.	-627.
h 2,533.			1,944.	589.
i 95,230.			72,290.	22,940.
j 46,915.			47,292.	-377.
k 81,120.			60,819.	20,301.
l 93,985.			89,646.	4,339.
m 179,833.			151,994.	27,839.
n 245,673.			139,038.	106,635.
o 38,756.			32,655.	6,101.
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69		(I) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")		
(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		
a				28,748.
b				650,552.
c				-26.
d				68,271.
e				738.
f				11,600.
g				-627.
h				589.
i				22,940.
j				-377.
k				20,301.
l				4,339.
m				27,839.
n				106,635.
o				6,101.
2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }		2	
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) If (loss), enter "-0-" in Part I, line 8	}		3	

## Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr)	(d) Date sold (mo., day, yr)
1a	WELLS FARGO #3478 LT		VARIOUS	VARIOUS
b	WELLS FARGO #9623 ST		VARIOUS	VARIOUS
c	WELLS FARGO #9623 LT		VARIOUS	VARIOUS
d	DYNAMIC EQUITY MANAGERS PORT 2 K-1 ST		VARIOUS	VARIOUS
e	DYNAMIC EQUITY MANAGERS PORT 2 K-1 LT		VARIOUS	VARIOUS
f	CAPITAL GAINS DIVIDENDS			
g				
h				
i				
j				
k				
l				
m				
n				
o				
(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 187,205.		125,129.	62,076.	
b 78,601.		76,983.	1,618.	
c 100,934.		81,452.	19,482.	
d 1,050.			1,050.	
e 62,168.			62,168.	
f 18,636.			18,636.	
g				
h				
i				
j				
k				
l				
m				
n				
o				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")	
(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			62,076.	
b			1,618.	
c			19,482.	
d			1,050.	
e			62,168.	
f			18,636.	
g				
h				
i				
j				
k				
l				
m				
n				
o				
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	1,112,653.
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

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**Part XV | Supplementary Information**

**3 Grants and Contributions Paid During the Year (Continuation)**

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
ADL/A WORLD OF DIFFERENCE INSTITUTE ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	45,000.
ALBANY INSTITUTE OF HISTORY & ART - EXHIBIT SUPPORT ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	250.
ALBANY INSITUTE - EXHIBIT SUPPORT ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	300.
ALBANY INSTITUTE OF HISTORY & ART - GALA ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	1,000.
ALBANY INSTITUTE OF HISTORY & ART - PAINTING EXHIBITION ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	250.
ALBANY INSTITUTE OF HISTORY & ART - RENEWAL ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	500.
ALBANY INSTITUTE OF HISTORY AND ART ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	2,100.
ALBANY PRO MUSICA - SUPPORT AT THE FRIENDS LEVEL ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	250.
ALLIANCE FOR POSITIVE HEALTH - SUPPORT ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	300.
ALSAC - GALA - WNA ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	5,000.
<b>Total from continuation sheets</b>				<b>2,274,925.</b>

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**Part XV | Supplementary Information**

**3 Grants and Contributions Paid During the Year (Continuation)**

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
ALZHEIMER'S ASSOCIATION ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	5,000.
ALZHEIMER'S ASSOCIATION - CONTRIBUTION ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	500.
AMERICAN MEDITATION INSTITUTE - 21ST ANNIVERSARY AVERILL PARK, NY	N/A	PUBLIC	UNRESTRICTED	1,000.
AMERICAN CANCER SOCIETY - MISSION AUCTION ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	10,000.
AMERICAN DIABETES ASSOCIATION ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	1,000.
AMERICAN HEART ASSOCIATION - CIRCLE OF RED/RED TIE ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	1,000.
AMERICAN HEART ASSOCIATION - GO RED FOR WOMEN ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	5,000.
AMERICAN HEART ASSOCIATION - SPONSORSHIP ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	10,000.
AMERICAN ITALIAN HERITAGE ASSN. - PROGRAM SUPPORT ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	125.
AMERICAN ITALIAN HERITAGE ASSOCIATION - GIFT ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	225.
<b>Total from continuation sheets</b>				

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**Part XV | Supplementary Information**

**3 Grants and Contributions Paid During the Year (Continuation)**

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
ANIMAL PROTECTIVE FOUNDATION - TAILS BY TWILIGHT SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	300.
A RING OF HOPE BOXING CLUB - SUPPORT OF MOVING SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	500.
ARTHRITIS FOUNDATION - COMMITMENT TO A CURE ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	1,000.
B'NOS ISRAEL MIKVAH - ANNUAL CONTRIBUTION ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	180.
BACKSTRETCH EMPLOYEES SERVICES TEAM SARATOGA, NY	N/A	PUBLIC	UNRESTRICTED	10,000.
BERKSHIRE SOUTH REGIONAL COMMUNITY CENTER SUPPORT GREAT BARRINGTON, MA	N/A	PUBLIC	UNRESTRICTED	250.
BET SHRAGA HEBREW ACADEMY - SHOMRAY TORAH FUND ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	1,000.
BETHESDA HOUSE - FALL FUNDRAISER - WNA SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	200.
BETHESDA HOUSE - PROGRAM SUPPORT SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	500.
BIG BROTHERS, BIG SISTERS - WNA EVENT ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	300.
<b>Total from continuation sheets</b>				

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**Part XV | Supplementary Information**

**3 Grants and Contributions Paid During the Year (Continuation)**

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
BIG BROTHERS/BIG SISTERS - CHEF'S CHALLENGER WNA ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	
				300.
BIG BROTHERS/BIG SISTERS - MATCHING GIFT ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	
				15,000.
BOCA RIO FOUNDATION - 2017 GIFT BOCA RATON, FL	N/A	PUBLIC	UNRESTRICTED	
				2,500.
BOCA WEST CHILDREN FOUNDATION BOCA RATON, FL	N/A	PUBLIC	UNRESTRICTED	
				500.
BOWLING FOR PAWS/ALBANY DAMIAN CENTER ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	
				200.
BOYS & GIRLS CLUBS OF SCHENECTADY - GREAT FUTURES SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	
				1,200.
BOYS & GIRLS CLUBS OF SCHENECTADY - CONTRIBUTION SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	
				500.
BOYS AND GIRLS CLUB OF SCHENECTADY - BUS SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	
				15,000.
BOYS AND GIRLS CLUBS OF SCHENECTADY SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	
				100,000.
BRAIN INJURY ASSOCIATION - GIFT ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	
				250.
<b>Total from continuation sheets</b>				

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**Part XV Supplementary Information**

**3 Grants and Contributions Paid During the Year (Continuation)**

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
BREAST CANCER RESEARCH FOUNDATION NEW YORK, NY	N/A	PUBLIC	UNRESTRICTED	125,000.
BROOKSIDE MUSEUM - END OF YEAR GIFT SARATOGA, NY	N/A	PUBLIC	UNRESTRICTED	250.
BROOKSIDE MUSEUM - SPRING APPEAL SARATOGA, NY	N/A	PUBLIC	UNRESTRICTED	250.
BROOKSIDE MUSEUM - SUPPORT AT THE PATRON LEVEL SARATOGA, NY	N/A	PUBLIC	UNRESTRICTED	560.
BROTHERHOOD - CONGREGATION GATES OF HEAVEN SCHEECTADY, NY	N/A	PUBLIC	UNRESTRICTED	50.
CAMP GAN ISRAEL - SCHOLARSHIPS FOR CAMP PARKSVILLE, NY	N/A	PUBLIC	UNRESTRICTED	590.
CAPITAL REPERTORY THEATRE - CELEBRATION ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	1,000.
CAPITAL AREA COUNCIL OF CHURCHES - DINNER WNA ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	160.
CAPITAL DISTRICT WERC - STUDENT SPONSOR ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	250.
CAPITAL DISTRICT YMCA PRESIDENT'S AWARD ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	1,000.
<b>Total from continuation sheets</b>				

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**Part XV Supplementary Information**

**3 Grants and Contributions Paid During the Year (Continuation)**

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
CAPITAL REGION CHAMBER - DINNER ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	525.
CAPITAL REGION CHAMBER - WOMEN OF EXCELLENT ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	120.
CAPITAL REGION SPONSOR-A-SCHOLAR - HONORING G. GOLUB ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	300.
CAPITAL REPERTORY THEATRE - ON THE GROW - YEAR 2 ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	5,000.
CAPITAL ROOTS - AUTUMN EVENING WNA ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	450.
CAPITAL ROOTS - SUPPORTER ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	300.
CARTER'S CREW CORPORATION - WNA EVENT ALTAMONT, NY	N/A	PUBLIC	UNRESTRICTED	300.
CATHEDRAL OF ALL SAINTS - MATCHING GRANT ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	250.
CENTER FOR COMMUNITY JUSTICE - WNA EVENT SCHEECTADY, NY	N/A	PUBLIC	UNRESTRICTED	150.
CENTER FOR DISABILITY SERVICES - WNA EVENT ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	2,500.
<b>Total from continuation sheets</b>				

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**3 Grants and Contributions Paid During the Year (Continuation)**

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
CITY MISSION - 2016 AND 2017 GIFTS SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	1,000.
CLOWNS ON ROUNDS ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	5,625.
CLOWNS ON ROUNDS ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	5,625.
CLOWNS ON ROUNDS ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	5,625.
CLOWNS ON ROUNDS ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	5,625.
COLONIE SENIOR SERVICE CENTERS - DONATION COLONIE, NY	N/A	PUBLIC	UNRESTRICTED	250.
CONGREGATION BETH EMETH 180TH CAMPAIGN ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	5,000.
CONGREGATION GATES OF HEAVEN - BOOK OF MEMORY SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	100.
CONGREGATION GATES OF HEAVEN SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	100,000.
CONGREGATION GATES OF HEAVEN - GUARDIAN SOCIETY SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	3,000.
<b>Total from continuation sheets</b>				

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**3 Grants and Contributions Paid During the Year (Continuation)**

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
CONGREGATION GATES OF HEAVEN - TCSC APPEAL SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	
				250.
CROHN'S & COLITIS - MISSION MATCH NEW YORK, NY	N/A	PUBLIC	UNRESTRICTED	
				3,700.
CROHN'S & COLITIS FOUNDATION - SILVER SPONSOR NEW YORK, NY	N/A	PUBLIC	UNRESTRICTED	
				2,750.
CURTAIN CALL THEATRE - 2 CHAIRS LATHAM, NY	N/A	PUBLIC	UNRESTRICTED	
				766.
CWS/CROP WALK ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	
				100.
DAKE FOUNDATION FOR CHILDREN - CONTRIBUTION SARATOGA, NY	N/A	PUBLIC	UNRESTRICTED	
				250.
DAUGHTERS OF SARAH JEWISH FOUNDATION - SUPPORT ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	
				2,000.
DAUGHTERS OF SARAH JEWISH FOUNDATION - WNA ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	
				360.
DOANE STUART SCHOOL - IN HONOR OF IRA GOLUB RENSSELAER, NY	N/A	PUBLIC	UNRESTRICTED	
				500.
DOMINICAN RETREAT & CONFERENCE CENTER - TRUCK FUND NISKAYUNA, NY	N/A	PUBLIC	UNRESTRICTED	
				600.
<b>Total from continuation sheets</b>				

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**3 Grants and Contributions Paid During the Year (Continuation)**

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
DOMINICAN RETREAT - 2018 GIVING - SUPPORTER LEVEL	N/A	PUBLIC	UNRESTRICTED	
NISKAYUNA, NY				500.
DOUBLE H RANCH - FUNDRAISER	N/A	PUBLIC	UNRESTRICTED	
LAKE LUZERNE, NY				700.
DOUBLE H RANCH	N/A	PUBLIC	UNRESTRICTED	
LAKE LUZERNE, NY				250,000.
DOUBLE H RANCH	N/A	PUBLIC	UNRESTRICTED	
LAKE LUZERNE, NY				20,000.
DOUBLE H RANCH	N/A	PUBLIC	UNRESTRICTED	
LAKE LUZERNE, NY				25,000.
DOUBLE H RANCH	N/A	PUBLIC	UNRESTRICTED	
LAKE LUZERNE, NY				100,000.
DUDLEY OBSERVATORY - ANNUAL FUND APPEAL	N/A	PUBLIC	UNRESTRICTED	
SCHENECTADY, NY				500.
EMPIRE STATE YOUTH ORCHESTRAS	N/A	PUBLIC	UNRESTRICTED	
ALBANY, NY				500.
EQUINOX, INC. - THANKSGATHERING EVENT	N/A	PUBLIC	UNRESTRICTED	
ALBANY, NY				250.
FAMILIES IN NEED OF ASSISTANCE - SUPPORT	N/A	PUBLIC	UNRESTRICTED	
ALBANY, NY				250.
<b>Total from continuation sheets</b>				

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**3 Grants and Contributions Paid During the Year (Continuation)**

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
FAMILIES IN NEED OF ASSISTANCE ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	500.
FAMILY & CHILD SERVICE OF SCHENECTADY SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	250.
FOUNDATION FOR ELLIS HOSPITAL - GALA SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	1,200.
FOUNDATION FOR ELLIS MEDICINE SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	77,500.
FOUNDATION FOR MOHAWK VALLEY LIBRARIES - SUPPORT SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	650.
FOWLER CAMP & RETREAT CENTER - SUPPORT LAKE PLEASANT, NY	N/A	PUBLIC	UNRESTRICTED	250.
FRIENDS OF NISKAYUNA ROWING - EQUIPMENT FUND NISKAYUNA, NY	N/A	PUBLIC	UNRESTRICTED	250.
FRIENDS OF THE GREENHOUSE - VENTILATION PROJECT SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	200.
FRIENDS OF THE SCH. COUNTY PUB. LIBRARY - SUPPORT SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	200.
GIRLS INC. - EVENT SUPPORT - WNA SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	300.
<b>Total from continuation sheets</b>				

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**3 Grants and Contributions Paid During the Year (Continuation)**

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
GIRLS INC. - PLATINUM SUPPORTER SCHEECTADY, NY	N/A	PUBLIC	UNRESTRICTED	500.
GRAND BOULEVARD FIRE COMPANY - ANNUAL FUND SCHEECTADY, NY	N/A	PUBLIC	UNRESTRICTED	250.
GREATER CAPITAL REGION ENDOWMENT FUND ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	50.
HABITAT FOR HUMANITY - BUILD - A - BASH - WNA ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	225.
HADASSAH - KEEPER OF THE GATE NEW YORK, NY	N/A	PUBLIC	UNRESTRICTED	1,000.
HADASSAH - SPECIAL GIFT NEW YORK, NY	N/A	PUBLIC	UNRESTRICTED	36.
HAMILTON HILL ARTS CENTER - CONTRIBUTION SCHEECTADY, NY	N/A	PUBLIC	UNRESTRICTED	250.
HATAS OF THE CAPITAL DISTRICT - 2017 GIFT ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	250.
HELP YOURSELF FOUNDATION - 2017 CONTRIBUTION SCHEECTADY, NY	N/A	PUBLIC	UNRESTRICTED	10,000.
HOPE HOUSE FUNDING - ANNIVERSARY GALA - WNA ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	450.
<b>Total from continuation sheets</b>				

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**3 Grants and Contributions Paid During the Year (Continuation)**

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
HOUSEWARES CHARITY FOUNDATION - BCRF DONATION ROSEMONT, IL	N/A	PUBLIC	UNRESTRICTED	
				10,000.
INTERFAITH COMMUNITY OF SCHENECTADY - CONTRIBUTION SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	
				100.
INTERNATIONAL REFUGEE ASSISTANCE PROJECT - WEDDING NEW YORK, NY	N/A	PUBLIC	UNRESTRICTED	
				150.
JACK FALVO III FOUNDATUIN - PROGRAM SUPPORT SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	
				250.
JEWISH FAMILY SERVICES - PROGRAM SUPPORT ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	
				300.
JEWISH FAMILY SERVICES - SUPPORT ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	
				500.
JEWISH FEDERATION OF NORTHEASTERN NEW YORK ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	
				90,000.
JEWISH FEDERATION OF NORTHEASTERN NEW YORK ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	
				91,250.
JEWISH FEDERATION OF NORTHEASTERN NEW YORK ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	
				1,250.
JEWISH FEDERATION OF NORTHEASTERN NEW YORK ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	
				91,250.
<b>Total from continuation sheets</b>				

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**3 Grants and Contributions Paid During the Year (Continuation)**

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
JEWISH FEDERATION OF NORTHEASTERN NEW YORK ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	
JEWISH NATIONAL FUND - SPONSOR OF BREAKFAST NEW YORK, NY	N/A	PUBLIC	UNRESTRICTED	2,500.
JEWISH NATIONAL FUND - SUPPORT NEW YORK, NY	N/A	PUBLIC	UNRESTRICTED	2,500.
JUNIOR ACHIEVEMENT - YEAR 3 OF 5 ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	500.
JUNIOR ACHIEVEMENT OF NORTHEASTERN NEW YORK - GIFT ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	300.
JUVENILE DIABETES RESEARCH - CONTRIBUTION NEW YORK, NY	N/A	PUBLIC	UNRESTRICTED	1,000.
KAREN L. MOUSSEAU FUND - VISIONS OF STRENGTH ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	350.
KIDS' ART FESTIVAL SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	350.
LAKE GEORGE ASSOCIATION - 2017 CONTRIBUTION LAKE GEORGE, NY	N/A	PUBLIC	UNRESTRICTED	500.
LAKE GEORGE EMERGENCY SQUAD - 2017 ANNUAL FUND LAKE GEORGE, NY	N/A	PUBLIC	UNRESTRICTED	250.
<b>Total from continuation sheets</b>				

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**3 Grants and Contributions Paid During the Year (Continuation)**

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
LAKE GEORGE FIRE DEPARTMENT - ANNUAL GIFT	N/A	PUBLIC	UNRESTRICTED	
LAKE GEORGE, NY				500.
LEAGUE OF THE SCHENECTADY SYMPHONY ORCHESTRA	N/A	PUBLIC	UNRESTRICTED	
SCHENECTADY, NY				100.
LIVING RESOURCES FOUNDATION - SUPPORT	N/A	PUBLIC	UNRESTRICTED	
ALBANY, NY				500.
MASS MOCA - 2017 YEAR END GIFT	N/A	PUBLIC	UNRESTRICTED	
NORTH ADAMS, MA				500.
MAIMONIDES HEBREW DAY SCHOOL - SCIENCE GIFT	N/A	PUBLIC	UNRESTRICTED	
ALBANY, NY				360.
MAKE-A-WISH NORTHEAST NEW YORK - CONTRIBUTION	N/A	PUBLIC	UNRESTRICTED	
ALBANY, NY				500.
MEMORAL SLOAN KETTERING CANCER CENTER	N/A	PUBLIC	UNRESTRICTED	
NEW YORK, NY				500.
MICHIGAN HILLEL - SPONSOR LEVEL GIVING	N/A	PUBLIC	UNRESTRICTED	
ANN ARBOR, MI				500.
MISCI	N/A	PUBLIC	UNRESTRICTED	
SCHENECTADY, NY				100,000.
MISCI - 2017 TENTH ANNIVERSARY GALA SUPPORT	N/A	PUBLIC	UNRESTRICTED	
SCHENECTADY, NY				30,000.
<b>Total from continuation sheets</b>				

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**3 Grants and Contributions Paid During the Year (Continuation)**

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
MISCI - 2017 UNITED WAY BALANCE SCHEECTADY, NY	N/A	PUBLIC	UNRESTRICTED	806.
MISCI - ANNUAL FUND SCHEECTADY, NY	N/A	PUBLIC	UNRESTRICTED	3,500.
MISCI - MILKY WAY SPONSORSHIP SCHEECTADY, NY	N/A	PUBLIC	UNRESTRICTED	5,000.
MISCI - UNITED WAY DONATION SCHEECTADY, NY	N/A	PUBLIC	UNRESTRICTED	1,331.
MOHAWK HUDSON HUMANE SOCIETY ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	350.
MOHAWK HUDSON HUMANE SOCIETY - MISSION AUCTION ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	5,000.
MUSIC HAVEN - MATCHING CHAIR CHALLENGE SCHEECTADY, NY	N/A	PUBLIC	UNRESTRICTED	12,500.
MUSICIANS OF MA'ALWYCK - CONTRIBUTION SCOTIA, NY	N/A	PUBLIC	UNRESTRICTED	450.
N-CAP - GIFT TO SUPPORT THE WORK OF N-CAP ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	250.
NAT'L CENTER FOR MISSING & EXPLOITED CHILDREN - GIFT ALEXANDRIA, VA	N/A	PUBLIC	UNRESTRICTED	500.
<b>Total from continuation sheets</b>				

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**3 Grants and Contributions Paid During the Year (Continuation)**

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
NATIONAL MS SOCIETY - WOMEN AGAINST MS  NEW YORK, NY	N/A	PUBLIC	UNRESTRICTED	
				1,000.
NATIONAL MUSEUM OF AMERICAN JEWISH HISTORY #3 YEAR  PHILADELPHIA, PA	N/A	PUBLIC	UNRESTRICTED	
				1,800.
NATIONAL MUSEUM OF DANCE - MEMBERSHIP RENEWAL  SARATOGA, NY	N/A	PUBLIC	UNRESTRICTED	
				500.
NATIONAL MUSEUM OF RACING - SUPPORT  SARATOGA, NY	N/A	PUBLIC	UNRESTRICTED	
				1,500.
NENY CYSTIC FIBROSIS FOUNDATION  ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	
				250.
NISKAYUNA COMMUNITY FOUNDATION - 2017 GIFT  NISKAYUNA, NY	N/A	PUBLIC	UNRESTRICTED	
				2,500.
NISKAYUNA POLICE BENEVOLENT ASSOCIATION  NISKAYUNA, NY	N/A	PUBLIC	UNRESTRICTED	
				500.
NORMAN ROCKWELL MUSEUM  STOCKBRIDGE, MA	N/A	PUBLIC	UNRESTRICTED	
				2,500.
NORMAN ROCKWELL MUSEUM - CONTRIBUTION  STOCKBRIDGE, MA	N/A	PUBLIC	UNRESTRICTED	
				1,000.
NORMAN ROCKWELL MUSEUM - TOUR FUND SUPPORT  STOCKBRIDGE, MA	N/A	PUBLIC	UNRESTRICTED	
				250.
<b>Total from continuation sheets</b>				

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**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
NORTHEAST KIDNEY FOUNDATION - GIFT OF LIFE EVENT ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	350.
NORTHEAST KIDNEY FOUNDATION - MISSION AUCTION ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	5,000.
NORTHEAST KIDNEY FOUNDATION - SUPPORT ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	500.
NORTHEASTERN ASSOCIATION OF THE BLIND - 2017 SUPPORT ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	300.
NYS WOMEN, INC. - DUES ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	60.
OPERATION SANTA CLAUS ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	200.
PANCREATIC CANCER ACTION NETWORK - DONATION MANHATTAN BEACH, CA	N/A	PUBLIC	UNRESTRICTED	1,000.
PARK PLAYHOUSE, INC. - PRODUCER'S CIRCLE SUPPORT ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	1,000.
PETER G. YOUNG FOUNDATION ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	300.
PHI SIGMA SIGMA FOUNDATION - FOUNDER'S DAY ELKRIDGE, MD	N/A	PUBLIC	UNRESTRICTED	191.
<b>Total from continuation sheets</b>				

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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
PLANNED PARENTHOOD - ANNUAL GIFT ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	1,000.
PLAY FOR P.I.N.K. - BREAST CANCER RESEACH NEW YORK, NY	N/A	PUBLIC	UNRESTRICTED	1,500.
PRIDE CENTER OF THE CAPITAL REGIONS - WNA EVENT ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	400.
PROCTOR'S THEATRE SCHEECTADY, NY	N/A	PUBLIC	UNRESTRICTED	100,000.
PROCTOR'S THEATRE - 90TH ANNIVERSARY - WNA SCHEECTADY, NY	N/A	PUBLIC	UNRESTRICTED	1,200.
PROCTORS SCHEECTADY, NY	N/A	PUBLIC	UNRESTRICTED	12,500.
PROTECT THE ADIRONDACKS - LEGAL FUND LAKE GEORGE, NY	N/A	PUBLIC	UNRESTRICTED	250.
READING IS FUN PROGRAM - GIFT SCHEECTADY, NY	N/A	PUBLIC	UNRESTRICTED	500.
REGIONAL FOOD BANK - AUCTION GALA - WNA ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	400.
REGIONAL FOOD BANK - DINNER - WNA ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	400.
<b>Total from continuation sheets</b>				

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REGIONAL FOOD BANK OF NORTHEASTERN NY - CHALLENGE	N/A	PUBLIC	UNRESTRICTED	
ALBANY, NY				3,525.
RENSSELAER COUNTY HISTORICAL SOCIETY - GIFT	N/A	PUBLIC	UNRESTRICTED	
TROY, NY				250.
RENSSELAER PLATEAU ALLIANCE - PROGRAM SUPPORT	N/A	PUBLIC	UNRESTRICTED	
AVERILL PARK, NY				250.
ROMA INTANGIBLE LODGE - SUPPORT OF ANNIVERSARY	N/A	PUBLIC	UNRESTRICTED	
ALBANY, NY				170.
RONALD MCDONALD HOUSE CHARITIES - SUPPORT	N/A	PUBLIC	UNRESTRICTED	
ALBANY, NY				500.
ROSE GARDEN RESTORATION COMMITTEE	N/A	PUBLIC	UNRESTRICTED	
SCHENECTADY, NY				200.
RUN FOR SHELBY - SCHOLARSHIP CONTRIBUTION	N/A	PUBLIC	UNRESTRICTED	
ALBANY, NY				250.
SAFE INC. OF SCHENECTADY - GUARDIAN SUPPORT	N/A	PUBLIC	UNRESTRICTED	
SCHENECTADY, NY				300.
SALVATION ARMY - SCHENECTADY CORPS	N/A	PUBLIC	UNRESTRICTED	
SCHENECTADY, NY				500.
SAMARITAN COUNSELING CENTER - GIFT	N/A	PUBLIC	UNRESTRICTED	
SCHENECTADY, NY				300.
<b>Total from continuation sheets</b>				

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Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
SARATOGA BRIDGES FOUNDATION SARATOGA, NY	N/A	PUBLIC	UNRESTRICTED	500.
SARATOGA ARTS - SUPPORT 2017 SARATOGA, NY	N/A	PUBLIC	UNRESTRICTED	250.
SARATOGA ARTS -SUPPORT SARATOGA, NY	N/A	PUBLIC	UNRESTRICTED	250.
SARATOGA CENTER FOR THE FAMILY - EVENT - WNA SARATOGA, NY	N/A	PUBLIC	UNRESTRICTED	350.
SARATOGA CENTRAL CATHOLIC SCHOOL - GALA - WNA SARATOGA, NY	N/A	PUBLIC	UNRESTRICTED	250.
SARATOGA CHILDREN'S THEATRE - DONOR AT PRODUCER LEVEL SARATOGA, NY	N/A	PUBLIC	UNRESTRICTED	250.
SARATOGA CHILDREN'S THEATRE - PROGRQAM SUPPORT SARATOGA, NY	N/A	PUBLIC	UNRESTRICTED	300.
SARATOGA CITY BALLET - SUPPORT SARATOGA, NY	N/A	PUBLIC	UNRESTRICTED	250.
SARATOGA COUNTY ECONOMIC OPPORTUNITY COUNCIL SARATOGA, NY	N/A	PUBLIC	UNRESTRICTED	450.
SARATOGA COUNTY HISTORICAL SOCIETY - WNA EVENT SARATOGA, NY	N/A	PUBLIC	UNRESTRICTED	250.
<b>Total from continuation sheets</b>				

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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
SARATOGA PERFORMING ARTS CENTER SARATOGA, NY	N/A	PUBLIC	UNRESTRICTED	10,000.
SARATOGA ROWING ASSOCIATION - SPONSORSHIP SARATOGA, NY	N/A	PUBLIC	UNRESTRICTED	250.
SARATOGA SPRINGS HISTORY MUSEUM - APPEAL SARATOGA, NY	N/A	PUBLIC	UNRESTRICTED	250.
SARATOGA WARHORSE SARATOGA, NY	N/A	PUBLIC	UNRESTRICTED	1,000.
SARATOGA-SPONSOR-A-SCHOLAR - SUPPORT SARATOGA, NY	N/A	PUBLIC	UNRESTRICTED	1,000.
SCCC FOUNDATION - WNA EVENT SCHEECTADY, NY	N/A	PUBLIC	UNRESTRICTED	300.
SCCC FOUNDATION - FOOD FOR THOUGHT SCHEECTADY, NY	N/A	PUBLIC	UNRESTRICTED	300.
SCHENECTADY CITY SCHOOL DISTRICT FOUNDATION SCHEECTADY, NY	N/A	PUBLIC	UNRESTRICTED	250.
SCHENECTADY COMMUNITY HOME - WNA EVENT SCHEECTADY, NY	N/A	PUBLIC	UNRESTRICTED	600.
SCHENECTADY COUNTY HISTORICAL SOCIETY - RENEWAL SCHEECTADY, NY	N/A	PUBLIC	UNRESTRICTED	500.
<b>Total from continuation sheets</b>				

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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
SCHENECTADY COUNTY MEDICAL ALLIANCE - CONTRIBUUTION SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	
				500.
SCHENECTADY COUNTY PUBLIC LIBRARY SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	
				50,000.
SCHENECTADY DAY NURSERY SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	
				25,000.
SCHENECTADY DAY NURSERY - 2017 UNITED WAY BAL. SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	
				1,008.
SCHENECTADY DAY NURSERY - BBQ CHIX SUPPORT SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	
				250.
SCHENECTADY DAY NURSERY - PR FUND SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	
				5,000.
SCHENECTADY DAY NURSERY - PR FUND SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	
				5,000.
SCHENECTADY DAY NURSERY - PROGRAM SUPPORT SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	
				200.
SCHENECTADY DAY NURSERY - PUB. RELATIONS FUND SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	
				5,000.
SCHENECTADY DAY NURSERY - SPRING APPEAL SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	
				1,000.
<b>Total from continuation sheets</b>				

NEIL JANE WILLIAM ESTELLE GOLUB FAMILY  
FOUNDATION, INC.

22-2809785

**Part XV | Supplementary Information**

**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
SCHENECTADY DAY NURSERY - UNITED WAY DONATION	N/A	PUBLIC	UNRESTRICTED	
SCHENECTADY, NY				1,664.
SCHENECTADY HUMAN RIGHTS COMMISSION - MLK GIFT	N/A	PUBLIC	UNRESTRICTED	
SCHENECTADY, NY				150.
SCHENECTADY JCC - GALA	N/A	PUBLIC	UNRESTRICTED	
SCHENECTADY, NY				350.
SCHENECTADY JEWISH COMMUNITY CENTER - ART SUPPORT	N/A	PUBLIC	UNRESTRICTED	
SCHENECTADY, NY				180.
SCHENECTADY JEWISH COMMUNITY CENTER	N/A	PUBLIC	UNRESTRICTED	
SCHENECTADY, NY				30,000.
SCHENECTADY RING OF HOPE BOXING CLUB - SUPPORT	N/A	PUBLIC	UNRESTRICTED	
SCHENECTADY, NY				250.
SCHENECTADY DAY NURSERY - HC TABLE	N/A	PUBLIC	UNRESTRICTED	
SCHENECTADY, NY				1,000.
SENIOR SERVICES OF ALBANY - SUPPORT	N/A	PUBLIC	UNRESTRICTED	
ALBANY, NY				190.
SENIOR SERVICES OF ALBANY - TRAVERS EVENT	N/A	PUBLIC	UNRESTRICTED	
ALBANY, NY				325.
SIDNEY ALBERT ALBANY JCC - PILLARS AWARD EVENT	N/A	PUBLIC	UNRESTRICTED	
ALBANY, NY				300.
<b>Total from continuation sheets</b>				

NEIL JANE WILLIAM ESTELLE GOLUB FAMILY  
FOUNDATION, INC.

22-2809785

**Part XV Supplementary Information**

**3 Grants and Contributions Paid During the Year (Continuation)**

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
SISTERHOOD, CONG. GATES OF HEAVEN - CONTRIBUTION	N/A	PUBLIC	UNRESTRICTED	
SCHEECTADY, NY				250.
SOROPTIMIST INTERNATIONAL OF SCHEECTADY - SUPPORT	N/A	PUBLIC	UNRESTRICTED	
SCHEECTADY, NY				100.
SOROPTIMIST INT. OF SCHEECTADY - PROGRAM SUPPORT	N/A	PUBLIC	UNRESTRICTED	
SCHEECTADY, NY				110.
SOROPTIMIST INTERNATIONAL - SUPPORT OF SWEET DREAMS	N/A	PUBLIC	UNRESTRICTED	
SCHEECTADY, NY				250.
SOROPTIMIST INTERNATIONAL OF SCHEECTADY - GARDEN	N/A	PUBLIC	UNRESTRICTED	
SCHEECTADY, NY				150.
ST. JUDE CHILDREN'S RESEARCH HOSPITAL - BRICK	N/A	PUBLIC	UNRESTRICTED	
ALBANY, NY				2,000.
SUNNYVIEW HOSPITAL AUXILIARY - SUPPORT	N/A	PUBLIC	UNRESTRICTED	
SCHEECTADY, NY				100.
SWINGING ON A STAR - MISSION AUCTION	N/A	PUBLIC	UNRESTRICTED	
ALBANY, NY				15,000.
THE GLOVE PERFORMING ARTS CENTER - CONTRIBUTION	N/A	PUBLIC	UNRESTRICTED	
GLOVERSVILLE, NY				250.
THE ALBANY DAMIEN CENTER - ONE APARTMENT	N/A	PUBLIC	UNRESTRICTED	
ALBANY, NY				2,500.
<b>Total from continuation sheets</b>				

NEIL JANE WILLIAM ESTELLE GOLUB FAMILY  
FOUNDATION, INC.

22-2809785

**Part XV Supplementary Information**

**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
THE ARTS CENTER OF THE CAPITAL REGION - SUPPORT	N/A	PUBLIC	UNRESTRICTED	
ALBANY, NY				400.
THE CITY OF SCHENECTADY - MUSIC HAVEN SOCIAL	N/A	PUBLIC	UNRESTRICTED	
SCHENECTADY, NY				250.
THE COLONIE-GUILDERLAND ROTARY - PET FAIR	N/A	PUBLIC	UNRESTRICTED	
COLONIE, NY				500.
THE COMMUNITY FOUNDATION - CELEBRATION OF PHILAN.	N/A	PUBLIC	UNRESTRICTED	
ALBANY, NY				1,000.
THE CULINARY INSTITUTE OF AMERICA - FELLOWS RENEWAL	N/A	PUBLIC	UNRESTRICTED	
HYDE PARK, NY				4,500.
THE DOANE STUART SCHOOL - FUND THE CAUSE	N/A	PUBLIC	UNRESTRICTED	
RENSSELAER, NY				3,150.
THE EGG	N/A	PUBLIC	UNRESTRICTED	
ALBANY, NY				500.
THE FOUNDATION FOR ELLIS MEDICINE	N/A	PUBLIC	UNRESTRICTED	
SCHENECTADY, NY				40,000.
THE FOUNDATION FOR ELLIS MEDICINE	N/A	PUBLIC	UNRESTRICTED	
SCHENECTADY, NY				30,000.
THE FOUNDATION FOR ELLIS MEDICINE - CHAMPION LEVEL	N/A	PUBLIC	UNRESTRICTED	
SCHENECTADY, NY				1,200.
<b>Total from continuation sheets</b>				

NEIL JANE WILLIAM ESTELLE GOLUB FAMILY  
FOUNDATION, INC.

22-2809785

**Part XV | Supplementary Information**

**3 Grants and Contributions Paid During the Year (Continuation)**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
THE FOUNDATION FOR ELLIS MEDICINE - SUPPORT SMART FUND SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	
				250.
THE FOUNDATION FOR MOHAWK VALLEY LIBRARIES SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	
				500.
THE FUND FOR LAKE GEORGE LAKE GEORGE, NY	N/A	PUBLIC	UNRESTRICTED	
				25,000.
THE GAZETTE NEWSPAPERS - NEWSPAPER IN EDUCATION SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	
				250.
THE NEW YORK STATE TROOPER FOUNDATION ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	
				100.
THE SALVATION ARMY - GIFT ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	
				500.
THE SCHENECTADY CIVIC PLAYERS - YEAR #2 SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	
				5,000.
THE SHELLSTRONG FOUNDATION - CONTRIBUTION BURNT HILLS, NY	N/A	PUBLIC	UNRESTRICTED	
				250.
THE UNIV. OF ALBANY FOUND. - CITIZEN LAUREATE WNA ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	
				500.
TO LIFE! - GIFT ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	
				200.
<b>Total from continuation sheets</b>				

NEIL JANE WILLIAM ESTELLE GOLUB FAMILY  
FOUNDATION, INC.

22-2809785

**Part XV | Supplementary Information**

**3 Grants and Contributions Paid During the Year (Continuation)**

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
TO LIFE! - PINK BALL - WNA ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	450.
TO LOVE A CHILD, INC. - DONATION - USE WHERE NEEDED CLIFTON PARK, NY	N/A	PUBLIC	UNRESTRICTED	250.
TOWN OF GLENVILLE - SUPPORT OF YATES MANSION GLENVILLE, NY	N/A	PUBLIC	UNRESTRICTED	300.
TWIN RIVERS COUNCIL - BOY SCOUTS OF AMERICA - GIFT ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	500.
TWIN RIVERS COUNCIL - DINNER WNA ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	500.
TWO TOGETHER - COOKS FOR KIDS CONTRIBUTION ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	250.
U OF M - ALBANY SCHOLARSHIP FUND ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	250.
UNION COLLEGE SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	25,000.
UNION COLLEGE SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	200,000.
UNION COLLEGE GOLF PROGRAM - SUPPORT SCHENECTADY, NY	N/A	PUBLIC	UNRESTRICTED	100.
<b>Total from continuation sheets</b>				

NEIL JANE WILLIAM ESTELLE GOLUB FAMILY  
FOUNDATION, INC.

22-2809785

**Part XV | Supplementary Information**

**3 Grants and Contributions Paid During the Year (Continuation)**

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
UNITED STATES GOLF ASSOCIATION LIBERTY CORNER, NJ	N/A	PUBLIC	UNRESTRICTED	65.
UNITED WAY - 2017 BALANCE ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	202.
UNITED WAY OF THE GREATER CAPITAL REGION ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	25,000.
UNITED WAY OF THE GREATER CAPITAL REGION ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	333.
UNITY HOUSE TROY, NY	N/A	PUBLIC	UNRESTRICTED	500.
UNIVERSAL PRESERVATION HALL - YEAR 1 OF 5 YEAR PLEDGE SARATOGA, NY	N/A	PUBLIC	UNRESTRICTED	1,000.
VANDERHEYDEN - 185TH ANNIVERSARY TROY, NY	N/A	PUBLIC	UNRESTRICTED	1,833.
WERC - STUDENT SPONSOR ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	250.
WHISKERS - 2017 GIFT ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	250.
WHISKERS ANIMAL BENEVOLENT LEAGUE - GIFT ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	250.
Total from continuation sheets				

NEIL JANE WILLIAM ESTELLE GOLUB FAMILY  
FOUNDATION, INC.

22-2809785

**Part XV Supplementary Information**

**3 Grants and Contributions Paid During the Year (Continuation)**

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
WILDWOOD FOUNDATION SCHEECTADY, NY	N/A	PUBLIC	UNRESTRICTED	25,000.
WILDWOOD FOUNDATION - 50TH ANNIVERSARY GALA SCHEECTADY, NY	N/A	PUBLIC	UNRESTRICTED	450.
WOMEN'S FUND OF THE CAPITAL REGION - SUPPORT ALBANY, NY	N/A	PUBLIC	UNRESTRICTED	500.
YWCA - WOMEN OF ACHIEVEMENT CELEBRATION TROY, NY	N/A	PUBLIC	UNRESTRICTED	150.
YWCA NORTHEASTERN NEW YORK - APPEAL TROY, NY	N/A	PUBLIC	UNRESTRICTED	250.
YWCA NORTHEASTERN NEW YORK - NEW ROOF FUND TROY, NY	N/A	PUBLIC	UNRESTRICTED	5,000.
YWCA OF THE GREATER CAPITAL REGION - SUPPORT TROY, NY	N/A	PUBLIC	UNRESTRICTED	200.
YWCA OF THE GREATER CAPITAL REGION - SUPPORT TROY, NY	N/A	PUBLIC	UNRESTRICTED	500.
ZONTA CLUB OF SCHEECTADY - CONTRIBUTION SCHEECTADY, NY	N/A	PUBLIC	UNRESTRICTED	500.
<b>Total from continuation sheets</b>				

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

- Attach to Form 990, Form 990-EZ, or Form 990-PF.
- Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for the latest information.

OMB No. 1545-0047

**2017****Name of the organization**NEIL JANE WILLIAM ESTELLE GOLUB FAMILY  
FOUNDATION, INC.**Employer identification number**

22-2809785

**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 foundationCheck 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 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 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

LHA For Paperwork Reduction Act Notice, see the instructions for Form 990, 990-EZ, or 990-PF. Schedule B (Form 990, 990-EZ, or 990-PF) (2017)

Name of organization

NEIL JANE WILLIAM ESTELLE GOLUB FAMILY  
FOUNDATION, INC.

Employer identification number

22-2809785

**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	NEIL M. GOLUB TRUST 461 NOTT STREET SCHENECTADY, NY 12308	\$ 1,487,385.	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II for noncash contributions)

Name of organization

NEIL JANE WILLIAM ESTELLE GOLUB FAMILY  
FOUNDATION, INC.

Employer identification number

22-2809785

**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	VARIOUS SHARES OF STOCK	\$ 1,487,385.	01/17/17
		\$ _____	_____
		\$ _____	_____
	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$ _____	_____
	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$ _____	_____
	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$ _____	_____
	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions.)	(d) Date received
		\$ _____	_____

Name of organization

**Employer identification number**

NEIL JANE WILLIAM ESTELLE GOLUB FAMILY  
FOUNDATION, INC.

22-2809785

**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 info once) ► \$ \_\_\_\_\_  
Use duplicate copies of Part III if additional space is needed

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
1	TO SUPPORT, BY	TO SUPPORT, BY	THE GIFT IS HELD UNDER US
	CONTRIBUTIONS, OTHER	CONTRIBUTIONS,	BANK ACCT #9130 MANAGED
	CHARITABLE	OTHER CHARITABLE	BY KARPUS INVESTMENT
	ORGANIZATIONS.	ORGANIZATIONS.	MANAGEMENT.
		(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
(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

## FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	(A) REVENUE PER BOOKS	NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME
GOLDMAN SACHS #6928-1	24.	24.	
GOLDMAN SACHS #6987-9	691.	691.	
GOLDMAN SACHS #6988-7	18.	18.	
GOLDMAN SACHS #6989-5	8.	8.	
GOLDMAN SACHS #6990-3	425.	425.	
WELLS FARGO ADVISORS #9543	4.	4.	
<b>TOTAL TO PART I, LINE 3</b>	<b>1,170.</b>	<b>1,170.</b>	

## FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
DYNAMIC EQUITY MANAGERS PORT 2					
K-1	13,791.	0.	13,791.	13,791.	
FENIMORE CHARLES SCHWAB #8668	26,303.	1,250.	25,053.	25,053.	
GOLDMAN SACHS #6928-1	661.	10.	651.	651.	
GOLDMAN SACHS #6987-9	7,878.	0.	7,878.	7,878.	
GOLDMAN SACHS #6988-7	1,334.	0.	1,334.	1,334.	
GOLDMAN SACHS #6989-5	787.	18.	769.	769.	
GOLDMAN SACHS #6990-3	5,253.	0.	5,253.	5,253.	
GOLDMAN SACHS #9079-3	41,049.	17,358.	23,691.	23,691.	
GOLUB CORPORATION PREFERRED	50,314.	0.	50,314.	50,314.	
KARPUS US BANK #9130	278,917.	0.	278,917.	278,917.	
MERRILL LYNCH #4F93	2,535.	0.	2,535.	2,535.	
PY ACCRUED INCOME FROM INVESTMENTS	-1,659.	0.	-1,659.	-1,659.	
WELLS FARGO #3478	2,839.	0.	2,839.	2,839.	
WELLS FARGO #9623	3,432.	0.	3,432.	3,432.	
<b>TO PART I, LINE 4</b>	<b>433,434.</b>	<b>18,636.</b>	<b>414,798.</b>	<b>414,798.</b>	

FORM 990-PF

OTHER INCOME

STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
DYNAMIC EQUITY MANAGERS PORT 2 K-1			
NET IRC 988 LOSS	-20.	-20.	
MISCELLANEOUS INCOME	39.	39.	
NONDIVIDEND DISTRIBUTIONS	77.	77.	
TOTAL TO FORM 990-PF, PART I, LINE 11	96.	96.	

FORM 990-PF

LEGAL FEES

STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	356.	356.		0.
TO FM 990-PF, PG 1, LN 16A	356.	356.		0.

FORM 990-PF

ACCOUNTING FEES

STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	11,000.	11,000.		0.
TO FORM 990-PF, PG 1, LN 16B	11,000.	11,000.		0.

FORM 990-PF

OTHER PROFESSIONAL FEES

STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT ADVISORY FEES	130,701.	130,701.		0.
CONSULTING FEES	9,400.	9,400.		0.
TO FORM 990-PF, PG 1, LN 16C	140,101.	140,101.		0.

FORM 990-PF

TAXES

STATEMENT 7

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAXES PAID	1,174.	1,174.		0.
FEDERAL TAXES PAID	2,189.	0.		0.
TO FORM 990-PF, PG 1, LN 18	3,363.	1,174.		0.

FORM 990-PF

OTHER EXPENSES

STATEMENT 8

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BANK FEES	-65.	-65.		0.
STATE FILING FEES	775.	775.		0.
NONDEDUCTIBLE PASS THROUGH ITEMS FROM K-1	37.	0.		0.
TO FORM 990-PF, PG 1, LN 23	747.	710.		0.

FORM 990-PF

CORPORATE STOCK

STATEMENT 9

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
GOLDMAN SACHS #9079-3	1,872,250.	1,875,899.
GOLDMAN SACHS #6987-9	262,593.	335,932.
GOLDMAN SACHS #6988-7	136,104.	195,296.
GOLDMAN SACHS #6990-3	354,831.	428,986.
GOLDMAN SACHS #6928-1	108,025.	116,725.
FENIMORE CHARLES SCHWAB #8868	1,312,992.	2,876,627.
KARPUS US BANK #9130	6,842,403.	7,442,107.
WELLS FARGO #3478	103,501.	136,575.
WELLS FARGO #9623	66,768.	82,135.
GOLUB CORP \$57,173 SHS	643,190.	3,221,699.
TOTAL TO FORM 990-PF, PART II, LINE 10B	11,702,657.	16,711,981.

FORM 990-PF

OTHER INVESTMENTS

STATEMENT 10

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
DYNAMIC EQUITY MANAGERS PORT 2	COST	859,008.	1,065,655.
TOTAL TO FORM 990-PF, PART II, LINE 13		859,008.	1,065,655.

FORM 990-PF

SUMMARY OF DIRECT CHARITABLE ACTIVITIES

STATEMENT 11

ACTIVITY ONE

PLEASE NOTE, THE FOUNDATION IS NOT INVOLVED IN ANY DIRECT CHARITABLE ACTIVITIES. ITS PRIMARY PURPOSE IS TO SUPPORT, BY CONTRIBUTIONS, OTHER CHARITABLE ORGANIZATIONS EXEMPT UNDER INTERNAL REVENUE CODE SECTION 501(C)(3).

TO FORM 990-PF, PART IX-A, LINE 1

EXPENSES

0.