

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

Name of foundation GRETCHEN V & SAMUEL M FELDMAN PRIVATE FOUNDATION INC		A Employer identification number 52-2034763	
Number and street (or P O box number if mail is not delivered to street address) 10045 RED RUN BOULEVARD NO 250		Room/suite	B Telephone number (see instructions) (410) 356-5900
City or town, state or province, country, and ZIP or foreign postal code OWINGS MILLS, MD 21117		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ 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) \$ 2,332,711		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	
J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis)			

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)	121,710			
	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 . . .	35,994	35,994		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	254,901			
	b Gross sales price for all assets on line 6a 1,820,651				
	7 Capital gain net income (from Part IV, line 2) . . .		254,901		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)	2,574	0		
	12 Total. Add lines 1 through 11	415,179	290,895		
	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)	2,226	2,226		0
	c Other professional fees (attach schedule)	43,751	43,751		0
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	1,161	483		0
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	6,890	6,890		0
	24 Total operating and administrative expenses. Add lines 13 through 23	54,028	53,350		0
	25 Contributions, gifts, grants paid	263,491			263,491
	26 Total expenses and disbursements. Add lines 24 and 25	317,519	53,350		263,491
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	97,660			
	b Net investment income (if negative, enter -0-)		237,545		
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 (c) Fair Market Value		
Assets	1	Cash—non-interest-bearing	20,538	13,076	13,076
	2	Savings and temporary cash investments			
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	2,014,231	2,119,353	2,319,635
	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)			
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
15	Other assets (describe ▶ _____)				
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	2,034,769	2,132,429	2,332,711	
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	2,034,769	2,132,429	
	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			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see instructions)	2,034,769	2,132,429	
31	Total liabilities and net assets/fund balances (see instructions) .	2,034,769	2,132,429		

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	2,034,769
2	Enter amount from Part I, line 27a	2	97,660
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	2,132,429
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	2,132,429

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 See Additional Data Table			
b			
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 See Additional Data Table			
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) 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 See Additional Data Table			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	254,901
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	208,613	4,994,124	0 041772
2015	243,303	6,039,455	0 040286
2014	165,504	4,016,555	0 041205
2013	218,226	2,084,031	0 104713
2012	186,073	2,171,529	0 085688
2 Total of line 1, column (d)			2 0 313664
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 062733
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5			4 4,106,623
5 Multiply line 4 by line 3			5 257,621
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 2,375
7 Add lines 5 and 6			7 259,996
8 Enter qualifying distributions from Part XII, line 4			8 263,491

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	2,375
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3	Add lines 1 and 2.	3	2,375
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	2,375
6	Credits/Payments		
a	2017 estimated tax payments and 2016 overpayment credited to 2017	6a	2,434
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	2,434
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	59
11	Enter the amount of line 10 to be Credited to 2018 estimated tax ▶ 59 Refunded ▶	11	0

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for 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	No
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) ▶ MD		
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	Yes

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	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? Website address N/A	13	Yes	
14	The books are in care of GORFINE SCHILLER GARDYN PA Telephone no (410) 356-5900			

Located at **10045 RED RUN BLVD STE 250 OWINGS MILLS MD** ZIP+4 **21117**

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ☐ and enter the amount of tax-exempt interest received or accrued during the year 15			
16	At any time during calendar year 2017, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See 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 ▶	16	Yes	No

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

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

1a	During the year did the foundation (either directly or indirectly)		Yes	No
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? ☐ Organizations relying on a current notice regarding disaster assistance check here. ☐	1b		
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____			
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			
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?				
	<i>If "Yes," attach the statement required by Regulations section 53.4945–5(d)</i>	☐ Yes	☐ No		
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			
	<i>If "Yes" to 6b, file Form 8870</i>				No
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	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
DENE E FELDMAN 10045 RED RUN BLVD STE 250 OWINGS MILLS, MD 21117	VP-TREASURER 1 00	0	0	0
LEIGH E FELDMAN 10045 RED RUN BLVD STE 250 OWINGS MILLS, MD 21117	VP-SECRETARY 1 00	0	0	0
SAMUEL M FELDMAN 10045 RED RUN BLVD STE 250 OWINGS MILLS, MD 21117	PRESIDENT 1 00	0	0	0
GRETCHEN FELDMAN 10045 RED RUN BLVD STE 250 OWINGS MILLS, MD 21117	HONORARY CHAIRPERSON 0 00	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	Title, and average hours per week (b) devoted to position	(c) Compensation	Contributions to employee benefit plans and deferred compensation (d)	Expense account, (e) 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	2,232,333
b	Average of monthly cash balances.	1b	16,827
c	Fair market value of all other assets (see instructions).	1c	1,920,000
d	Total (add lines 1a, b, and c).	1d	4,169,160
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	4,169,160
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	62,537
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	4,106,623
6	Minimum investment return. Enter 5% of line 5.	6	205,331

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	205,331
2a	Tax on investment income for 2017 from Part VI, line 5.	2a	2,375
b	Income tax for 2017 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	2,375
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	202,956
4	Recoveries of amounts treated as qualifying distributions.	4	2,574
5	Add lines 3 and 4.	5	205,530
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	205,530

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	263,491
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	263,491
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see instructions).	5	2,375
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	261,116

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				205,530
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.	79,205			
b From 2013.	116,416			
c From 2014.				
d From 2015.				
e From 2016.				
f Total of lines 3a through e.	195,621			
4 Qualifying distributions for 2017 from Part XII, line 4 ▶ \$ 263,491				
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.				205,530
e Remaining amount distributed out of corpus	57,961			
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	253,582			
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).	79,205			
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a	174,377			
10 Analysis of line 9				
a Excess from 2013.	116,416			
b Excess from 2014.				
c Excess from 2015.				
d Excess from 2016.				
e Excess from 2017.	57,961			

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)

2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

	Tax year	Prior 3 years			(e) Total
	(a) 2017	(b) 2016	(c) 2015	(d) 2014	
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))

SAMUEL M FELDMAN

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	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)				
a <i>Paid during the year</i> See Additional Data Table				
Total			3a	263,491
b <i>Approved for future payment</i>				
Total			3b	0

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount		
1 Program service revenue						
a _____						
b _____						
c _____						
d _____						
e _____						
f _____						
g Fees and contracts from government agencies						
2 Membership dues and assessments. . . .						
3 Interest on savings and temporary cash investments						
4 Dividends and interest from securities. . . .			14	35,994		
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.			14	2,574		
8 Gain or (loss) from sales of assets other than inventory			18	254,901		
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		293,469		0
13 Total. Add line 12, columns (b), (d), and (e).			13			293,469

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

Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

		Yes	No
--	--	-----	----

--	--	--

1a(1)		No
1a(2)		No

--	--	--

1b(1)	No
--------------	-----------

1b(2)		No
--------------	--	-----------

1b(3)		No
--------------	--	-----------

1b(4)		No
--------------	--	-----------

1b(5)		No
--------------	--	-----------

1b(6)		No
--------------	--	-----------

1c		No
-----------	--	-----------

value
ue

[illegible]

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.

* * * * *

2018-07-09

May the IRS discuss this return with the preparer shown below

(see instr)? ☒ Yes ☐ No

Signature of officer or trustee

Date _____

Title

**Paid
Preparer
Use Only**

Print/Type preparer's name MATTHEW Q KEEFER CPA	Preparer's Signature	Date	Check if self-employed ☐	PTIN P00852427
Firm's name ▶ GORFINE SCHILLER & GARDYN PA				Firm's EIN ▶ 52-1231901
Firm's address ▶ 10045 RED RUN BLVD SUITE 250 OWINGS MILLS, MD 21117				Phone no (410) 356-5900

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

List and describe the kind(s) of property sold (e g , real estate, (a) 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)
WELLS FARGO ST COVERED	P	2017-01-01	2017-12-31
WELLS FARGO ST NONCOVERED	P	2017-01-01	2017-12-31
WELLS FARGO LT COVERED	P	2016-01-01	2017-12-31
WELLS FARGO LT NONCOVERED	P	2016-01-01	2017-12-31
PNC ST COVERED	P	2017-01-01	2017-12-31
PNC LT COVERED	P	2016-01-01	2017-12-31
PNC LT NONCOVERED	P	2016-01-01	2017-12-31
THE ASSOCIATED	P	2016-01-01	2017-12-31
CAPITAL GAINS DIVIDENDS	P		

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
423,189		389,235	33,954
157,538		162,909	-5,371
366,195		351,912	14,283
131,417		113,539	17,878
167,798		160,000	7,798
339,000		313,313	25,687
207,517		74,842	132,675
10,785			10,785
17,212			17,212

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

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) 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	
			33,954
			-5,371
			14,283
			17,878
			7,798
			25,687
			132,675
			10,785
			17,212

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
ACE MV INC35 GREENWOOD AVE VINEYARD HAVEN, MA 02568	NONE	501(C)(3)	CHARITABLE	1,000
ACHILLES TRACK CLUB 42 WEST 38TH ST 4TH FLOOR NEW YORK, NY 10018	NONE	501(C)(3)	CHARITABLE	1,200
AMERICAN JEWISH COMMITTEE 165 E 56TH STREET NEW YORK, NY 10022	NONE	501(C)(3)	CHARITABLE	100
AMERICAN MUSEUM OF NATURAL HISTORY CENTRAL PARK WEST AT 79TH STREET NEW YORK, NY 100245192	NONE	501(C)(3)	CHARITABLE	400
BIG BROTHERS BIG SISTERS OF MV 684 MAIN ST HYANNIS, MA 02601	NONE	501(C)(3)	CHARITABLE	500
Total ► 3a				263,491

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
BODHI PATH21 LAURAND DRIVE VINEYARD HAVEN, MA 02568	NONE	501(C)(3)	CHARITABLE	500
BONE MARROW FOUNDATION 515 MADISON AVE SUITE 1130 NEW YORK, NY 10022	NONE	501(C)(3)	CHARITABLE	500
BROOKLYN PUBLIC LIBRARY 10 GRAND ARMY PLAZA BROOKLYN, NY 11238	NONE	501(C)(3)	CHARITABLE	5,000
CENTRAL PARK CONSERVANCY 14 EAST 60TH STREET 8TH FLOOR NEW YORK, NY 10022	NONE	501(C)(3)	CHARITABLE	2,500
CENTRAL SYNAGOGUE 123 EAST 55TH ST NEW YORK, NY 10022	NONE	501(C)(3)	CHARITABLE	950
Total ▶ 3a				263,491

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
CHILMARK VOLUNTEER FIREMAN'S ASSOC PO BOX 119 3 MENEMSHA CROSSROAD CHILMARK, MA 02535	NONE	501(C)(3)	CHARITABLE	500
CONGREGATION BETH EL 422 SHIRLEY AVE NORFOLK, VA 23517	NONE	501(C)(3)	CHARITABLE	15,500
COOPER HEWIT MUSEUM 2 EAST 91ST STREET NEW YORK, NY 10128	NONE	501(C)(3)	CHARITABLE	125
DANIEL'S MUSIC FOUNDATION 1641 3RD AVE 21A NEW YORK, NY 10128	NONE	501(C)(3)	CHARITABLE	500
FARM BASED EDUCATION ASSOCIATION 1611 HARBOR RD SHELBURNE, VT 05482	NONE	501(C)(3)	CHARITABLE	10,000
Total 				263,491
3a				

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
FARM INSTITUTE PO BOX 1868 EDGARTOWN, MA 02539	NONE	501(C)(3)	CHARITABLE	2,000
FEATHERSTONE PO BOX 1145 OAK BLUFFS, MA 02557	NONE	501(C)(3)	CHARITABLE	2,000
FRAME CENTER 455 STATE ROAD UNIT 20 VINEYARD HAVEN, MA 02568	NONE	501(C)(3)	CHARITABLE	453
FRIENDS OF FAMILY PLANNING PO BOX 909 VINEYARD HAVEN, MA 02568	NONE	501(C)(3)	CHARITABLE	250
FRIENDS OF MVY RADIO PO BOX 1148 VINEYARD HAVEN, MA 02568	NONE	501(C)(3)	CHARITABLE	1,000
Total 3a				263,491

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
FRIENDS OF THE CHILMARK LIBRARY PO BOX 434 CHILMARK, MA 02535	NONE	501(C)(3)	CHARITABLE	500
FRIENDS OF UP-ISLAND COUNCIL ON AGING PO BOX 3174 WEST TISBURY, MA 02575	NONE	501(C)(3)	CHARITABLE	600
PALM BEACH TABLE TENNIS CLUB 2105 CORPORATE DRIVE BOYNTON BEACH, FL 33426	NONE	501(C)(3)	CHARITABLE	200
ISLAND FOOD PANTRYPO BOX 1874 VINEYARD HAVEN, MA 02568	NONE	501(C)(3)	CHARITABLE	500
LIVE LIKE BLAINE FOUNDATION TWO BALA PLAZA SUITE 401 BALA CYNWYD, PA 19004	NONE	501(C)(3)	CHARITABLE	1,500
Total ► 3a				263,491

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
MARINE & PALEOBIOLOGICAL RESEARCH PO BOX 1016 VINEYARD HAVEN, MA 02568	NONE	501(C)(3)	CHARITABLE	300
MARTHA'S VINEYARD DONOR'S COLLABORATIVE PO BOX 326 CHILMARK, MA 02535	NONE	501(C)(3)	CHARITABLE	7,185
MASS AUDOBON 208 SOUTH GREAT ROAD LINCOLN, MA 01773	NONE	501(C)(3)	CHARITABLE	100
METROPOLITAN MUSEUM OF ART 1000 FIFTH AVENUE NEW YORK, NY 100280198	NONE	501(C)(3)	CHARITABLE	300
MUSEUM OF MODERN ARTSPO BOX 724 NEW YORK, NY 10102	NONE	501(C)(3)	CHARITABLE	360
Total 				263,491
3a				

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
MV CANCER SUPPORT GROUP INC PO BOX 2214 VINEYARD HAVEN, MA 02568	NONE	501(C)(3)	CHARITABLE	1,000
MV CEREBRAL PALSY CAMP INC PO BOX 1357 VINEYARD HAVEN, MA 02568	NONE	501(C)(3)	CHARITABLE	300
MV CHAMBER MUSIC SOCIETY PO BOX 4189 VINEYARD HAVEN, MA 02568	NONE	501(C)(3)	CHARITABLE	10,000
MV COMMUNITY SERVICES 111 EDGARTOWN RD VINEYARD HAVEN, MA 02568	NONE	501(C)(3)	CHARITABLE	1,600
MV NAACPPO BOX 1513 OAK BLUFFS, MA 02557	NONE	501(C)(3)	CHARITABLE	100
Total ▶ 3a				263,491

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
MV MEDITATION PROGRAMPO BOX 761 VINEYARD HAVEN, MA 02568	NONE	501(C)(3)	CHARITABLE	250
MV FILM SOCIETYPO BOX 4423 VINEYARD HAVEN, MA 02568	NONE	501(C)(3)	CHARITABLE	7,000
MV HEBREW CENTERPO BOX 692 VINEYARD HAVEN, MA 02568	NONE	501(C)(3)	CHARITABLE	2,190
MV PRESERVATION TRUSTPO BOX 5277 EDGARTOWN, MA 02539	NONE	501(C)(3)	CHARITABLE	500
MVICW7 EAST PATURE ROAD EDGARTOWN, MA 02539	NONE	501(C)(3)	CHARITABLE	1,600
Total ► 3a				263,491

Form 990PF Part XV Line 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)				
a Paid during the year				
NATIONAL TRUST FOR HISTORIC PRESERVATION PO BOX 5043 HAGERSTOWN, MD 217419823	NONE	501(C)(3)	CHARITABLE	300
NATIONAL WIDOWERS ORGANIZATION INC 14 EARL RD EAST SANDWICH, MA 02537	NONE	501(C)(3)	CHARITABLE	20,980
PALM BEACH FELLOWSHIP OF CHRISTIANJEWS PO BOX 507 PALM BEACH, FL 33480	NONE	501(C)(3)	CHARITABLE	750
PLANNED PARENTHOOD 434 WEST 33RD STREET NEW YORK, NY 10001	NONE	501(C)(3)	CHARITABLE	1,000
PERMANENT ENDOWMENT FOR MV PO BOX 243 WEST TISBURY, MA 02575	NONE	501(C)(3)	CHARITABLE	5,050
Total ▶ 3a				263,491

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
POLLY HILL ARBORETUMPO BOX 561 WEST TISBURY, MA 02575	NONE	501(C)(3)	CHARITABLE	10,000
SHERIFF'S MEADOW FOUNDATION 57 DAVID AVE VINEYARD HAVEN, MA 02568	NONE	501(C)(3)	CHARITABLE	1,250
SMITH CENTER FOR HEALING AND THE ARTS 1632 U ST NW WASHINGTON, DC 20009	NONE	501(C)(3)	CHARITABLE	30,000
SOLOMON R GUGGENHEIM FOUNDATION 1071 FIFTH AVENUE NEW YORK, NY 10128	NONE	501(C)(3)	CHARITABLE	140
SOUTH FLORIDA PBS 3401 S CONGRESS AVE BOYNTON BEACH, FL 33426	NONE	501(C)(3)	CHARITABLE	40
Total 				263,491
3a				

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
TEMPLE EMANUEL OF PALM BEACH 190 N COUNTY ROAD PALM BEACH, FL 33480	NONE	501(C)(3)	CHARITABLE	2,075
THE ARNOLD P GOLD FOUNDATION 619 PALISADE AVE ENGLEWOOD CLIFFS, NJ 07632	NONE	501(C)(3)	CHARITABLE	5,000
THE BONE MARROW FOUNDATION 515 MADISON AVE SUITE 1130 NEW YORK, NY 10022	NONE	501(C)(3)	CHARITABLE	300
THE JEWISH MUSEUM 1109 5TH AVE 92ND ST NEW YORK, NY 10128	NONE	501(C)(3)	CHARITABLE	65
THE SPENCE SCHOOL 22 EAST 91ST STREET NEW YORK, NY 10128	NONE	501(C)(3)	CHARITABLE	5,000
Total ▶ 3a				263,491

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
THE YARDPO BOX 405 CHILMARK, MA 02535	NONE	501(C)(3)	CHARITABLE	250
TISBURY PRINTER25 OSPREY LANE CHILMARK, MA 02535	NONE	501(C)(3)	CHARITABLE	712
TRUSTEES OF RESERVATIONS 572 ESSEX STREET BEVERLY, MA 01915	NONE	501(C)(3)	CHARITABLE	20,750
TRUSTEES OF THE UNIVERSITY OF PENNSYLVANIA 3535 MARKET ST SUITE 750 PHILADELPHIA, PA 19104	NONE	501(C)(3)	CHARITABLE	250
VINEYARD CONSERVATION SOCIETY PO BOX 2189 VINEYARD HAVEN, MA 02568	NONE	501(C)(3)	CHARITABLE	5,500
Total ▶ 3a				263,491

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
VINEYARD HOUSEPO BOX 4599 VINEYARD HAVEN, MA 02568	NONE	501(C)(3)	CHARITABLE	500
WE NEED DIVERSE BOOKS 10319 WESTLAKE DRIVE 104 BETHESDA, MD 20817	NONE	501(C)(3)	CHARITABLE	5,000
WCAIWNANPO BOX 8200 WOODS HOLE, MA 02543	NONE	501(C)(3)	CHARITABLE	655
WEST TISBURY LIBRARY FOUNDATION PO BOX 1238 WEST TISBURY, MA 02575	NONE	501(C)(3)	CHARITABLE	500
WGBHPO BOX 55875 BOSTON, MA 022055875	NONE	501(C)(3)	CHARITABLE	100
Total 3a				263,491

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
WHITNEY MUSEUM OF AMERICAN ART 945 MADISON AVENUE NEW YORK, NY 10021	NONE	501(C)(3)	CHARITABLE	250
WNYCPO BOX 1550 NEW YORK, NY 101161550	NONE	501(C)(3)	CHARITABLE	100
WXEL3401 S CONGRESS AVE BOYNTON BEACH, FL 33426	NONE	501(C)(3)	CHARITABLE	125
YMCA OF MARTHA'S VINEYARD 111R EDGARTOWN VINEYARD HAVEN ROAD VINEYARD HAVEN, MA 02568	NONE	501(C)(3)	CHARITABLE	11,350
ADAS YOSHURONPO BOX 1250 ROCKLAND, NY 10018	NONE	501(C)(3)	CHARITABLE	500
Total ► 3a				263,491

Form 990PF Part XV Line 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)				
a <i>Paid during the year</i>				
AFRICAN AQUATIC CONSERVATION FUND PO BOX 366 CHILMARK, MA 02535	NONE	501(C)(3)	CHARITABLE	500
BETH SHOLOM VILLAGE 6401 AUBURN DRIVE VIRGINIA BEACH, VA 23464	NONE	501(C)(3)	CHARITABLE	5,000
BOSTON MEDICAL CENTER 801 MASSACHUSETTS AVE 1ST FLOOR BOSTON, MA 02118	NONE	501(C)(3)	CHARITABLE	2,500
CARE FOR THE HOMELESS 30 E 33RD STREET NEW YORK, NY 10010	NONE	501(C)(3)	CHARITABLE	1,000
CHAMBER MUSIC SOCIETY OF PALM BEACH 190 VALENCIA RD WEST PALM BEACH, FL 33401	NONE	501(C)(3)	CHARITABLE	1,500
Total ► 3a				263,491

Form 990PF Part XV Line 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)				
a Paid during the year				
DAVID LYNCH FOUNDATION 228 E 45TH STREET 15TH FLOOR NEW YORK, NY 10017	NONE	501(C)(3)	CHARITABLE	1,000
DIR BIYABIRPO BOX 391532 MOUNTAIN VIEW, CA 94039	NONE	501(C)(3)	CHARITABLE	3,200
DOCTORS WITHOUT BORDERS PO BOX 5023 HAGERSTOWN, MD 21741	NONE	501(C)(3)	CHARITABLE	200
DRUM WORKSHOPPO BOX 3000 WEST TISBURY, MA 02575	NONE	501(C)(3)	CHARITABLE	3,000
EXODUS 1947 INSTITUTE 350 WEST 57TH STREET SUITE 6B NEW YORK, NY 10019	NONE	501(C)(3)	CHARITABLE	15,000
Total ▶ 3a				263,491

Form 990PF Part XV Line 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)				
a Paid during the year				
FREEDOM HOUSE 1850 M STREET FLOOR 11 WASHINGTON, DC 20036	NONE	501(C)(3)	CHARITABLE	5,000
IKAR5870 WEST OLYMPIC BLVD LOS ANGELES, CA 90019	NONE	501(C)(3)	CHARITABLE	1,631
ISLAND HOUSING TRUSTPO BOX 779 WEST TISBURY, MA 02575	NONE	501(C)(3)	CHARITABLE	12,500
JEWISH MUSEUM OF MARYLAND 15 LLOYD STREET BALTIMORE, MD 21202	NONE	501(C)(3)	CHARITABLE	35
PALM BEACH DRAMAWORKS 201 CLEMATIS STREET WEST PALM BEACH, FL 33401	NONE	501(C)(3)	CHARITABLE	300
Total ▶ 3a				263,491

Form 990PF Part XV Line 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)				
a Paid during the year				
ROSIE'S THEATER KIDS 445 W 45TH STREET NEW YORK, NY 10036	NONE	501(C)(3)	CHARITABLE	500
THEODORE ROOSEVELT ASSOCIATION PO BOX 719 OYSTER BAY, NY 11771	NONE	501(C)(3)	CHARITABLE	870
WATER FOR AWRA AMBA 130 CENTER STREET VINEYARD HAVEN, MA 02568	NONE	501(C)(3)	CHARITABLE	200
Total ▶ 3a				263,491

TY 2017 Accounting Fees Schedule

Name: GRETCHEN V & SAMUEL M FELDMAN PRIVATE
FOUNDATION INC

EIN: 52-2034763

Accounting Fees Schedule

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	1,785	1,785		0
OTHER PROFESSIONAL FEES	441	441		0

TY 2017 Investments Corporate Stock Schedule

Name: GRETCHEN V & SAMUEL M FELDMAN PRIVATE
FOUNDATION INC

EIN: 52-2034763

Name of Stock	End of Year Book Value	End of Year Fair Market Value
WACHOVIA #1467	1,169,572	1,303,718
THE ASSOCIATED	587,759	618,162
WACHOVIA #3300	362,022	397,755

TY 2017 Other Expenses Schedule

Name: GRETCHEN V & SAMUEL M FELDMAN PRIVATE
FOUNDATION INC

EIN: 52-2034763

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OFFICE EXPENSE	138	138		0
ART EXPENSES	6,752	6,752		0

TY 2017 Other Income Schedule

Name: GRETCHEN V & SAMUEL M FELDMAN PRIVATE
FOUNDATION INC

EIN: 52-2034763

Other Income Schedule

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
RECOVERY	2,574	0	2,574

TY 2017 Other Professional Fees Schedule

Name: GRETCHEN V & SAMUEL M FELDMAN PRIVATE
FOUNDATION INC

EIN: 52-2034763

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT FEES	43,751	43,751		0

**TY 2017 Substantial Contributors
Schedule**

Name: GRETCHEN V & SAMUEL M FELDMAN PRIVATE
FOUNDATION INC

EIN: 52-2034763

Name	Address
SAMUEL FELDMAN REVOCABLE TRUST	25 OSPREY LANE CHILMARK, MA 02535

TY 2017 Taxes Schedule

Name: GRETCHEN V & SAMUEL M FELDMAN PRIVATE
FOUNDATION INC

EIN: 52-2034763

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAX ON DIVIDEND INCOME	483	483		0
EXCISE TAXES	678	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 GRETCHEN V & SAMUEL M FELDMAN PRIVATE FOUNDATION INC	Employer identification number 52-2034763

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 33¹/₃% 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 GRETCHEN V & SAMUEL M FELDMAN PRIVATE FOUNDATION INC	Employer identification number 52-2034763
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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	SAMUEL FELDMAN	\$ 101,089	Person ☒
	25 OSPREY LANE		Payroll ☐
	CHILMARK, MA 02535		Noncash ☒ (Complete Part II for noncash contributions)
2	SAMUEL FELDMAN	\$ 50,000	Person ☒
	25 OSPREY LANE		Payroll ☐
	CHILMARK, ME 02535		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)
.		\$	Person ☐
			Payroll ☐
			Noncash ☐ (Complete Part II for noncash contributions)

Name of organization GRETCHEN V & SAMUEL M FELDMAN PRIVATE FOUNDATION INC	Employer identification number 52-2034763
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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	204 SHARES OF ISHARES CORE S&P SMALL-CAP E	\$ 15,761	2017-12-22
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	314 SHARES OF ISHARES CORE S&P SMALL CAP E	\$ 24,260	2017-12-22
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	120 SHARES OF ISHARES RUSSELL 1000 GROWTH ETF	\$ 16,226	2017-12-22
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	296 SHARES OF ISHARES RUSSELL 1000 GROWTH ETF	\$ 40,025	2017-12-22
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
1	18 SHARES OF SPDR S&P 500 ETF TRUST	\$ 4,817	2017-12-22
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (See instructions)	(d) Date received
		\$	

Name of organizationGRETCHEN V & SAMUEL M FELDMAN PRIVATE
FOUNDATION INC**Employer identification number**

52-2034763

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
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(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	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	_____	_____	_____
	_____	_____	_____
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	